THE GATE
SCHOOL

THE GATE SCHOOL

AMENDED CHARTER SCHOOL CREATION APPLICATION
SUBMITTED TO METRO NASHVILLE PUBLIC SCHOOLS

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Application Cover Sheet

GENERAL INFORMATION

Name of Proposed Charter School	The Gate School		
Sponsor/Sponsoring Entity	The Gate School (nonprofit)		
Proposed Authorizer	Metropolitan Nashville Public Schools		
Academic Focus of Proposed School	Harkness Method and AI Enhanced Learning		
Grade Structure (e.g., K-5, 6-8, 9-12)	**Year 1**	**Year 5**	**At Capacity**
	6th	6th-8th	6th-8th
Projected Enrollment	**Year 1**	**Year 5**	**At Capacity**
	120	360	360
Neighborhood and/or Community in which the school plans to locate	Davidson County		
Projected Opening School Year	2027		

Primary Point of Contact for this Application

In the table below, identify the primary point of contact (PPOC) for this application. The PPOC will handle all communications, scheduling, and notices related to the application. The PPOC is responsible to ensure timely dissemination of information to all involved parties. The PPOC's name will be public information.

Name	Burrus Cox
Role in Proposed School	Executive Partner
Mailing Address	816 Gwynn Drive
Mailing Address Line 2	
City, State, Zip Code	Nashville, TN, 37216
Primary Telephone	615-330-8495
Alternate Telephone	615-496-5077
Email Address	burrus@thegateschool.org

Applicant Team

In the table below, identify all individuals who supported the development of this application, their current job and employer, and the role they played in drafting the content included here. Add rows as needed.

Name	Current Job Title and Employer	Role in Drafting this Charter School Application
Burrus Cox	Proposed, Executive Partner | Fellow at Nashville Incubator	Co-Founder; Lead author and primary designer of the academic, staffing, culture, and instructional model; responsible for drafting and integrating all sections of the application.
Jim Leckrone	Proposed, Operations Partner | Fellow at Nashville	Co-founder; Co-author of operational, financial, staffing, and facilities sections;

	Incubator| Founder and Executive Director at East End Prep	led feasibility analysis and implementation planning.
Todd Dickson	Founder and Executive Director of Valor Collegiate Academies	Board member; Provided strategic guidance and governance-level feedback on the charter application.
Demetria Giles	Director of Curriculum at Nashville Teacher Residency	Board Member; Provided strategic guidance and governance-level feedback on the charter application.
Viva Price	Executive Director at Youth Encouragement Services	Board Chair, Provided strategic guidance and governance-level feedback on the charter application.
Andrea Kinzer	Director of Operations at Teach For America Nashville	Board Member; Provided strategic guidance and governance-level feedback on the charter application.
John Webb	Vice President at Pinnacle Asset Management	Board Member; Provided strategic guidance and governance-level feedback on the charter application.
Brittany Monda	Director of Strategy at Nashville Incubator	Supported strategic alignment, theory of action development, and review of academic and organizational design.
Lisa Stone	Director of Fellows at Nashville Incubator	Provided coaching, structured feedback, and quality control across application drafts and timelines.
Shelby Goodfriend	Director of Facilities at Nashville Incubator	Advised on facilities planning, site feasibility, and facilities-related application components.
Rafiq Kalam Id-Din II	Founder and Managing Partner at Ember Charter Schools	Served as consultant and thought partner on the Teaching Firm staffing model and leadership design.
Christine Yang	School Finance Manager, Vertex Education (formerly EdTec)	Budget development
Ben Crowe	Senior School Finance Manager, Vertex Education (formerly EdTec)	Budget development
Cate Elcan Fair	*Entrepreneur and Community Leader*	Board Member; Provided strategic guidance and governance-level feedback on the charter application.
Holt Madden	Senior Associate at Boyle Investment Group	Board Member; Provided strategic guidance and governance-level feedback on the charter application.

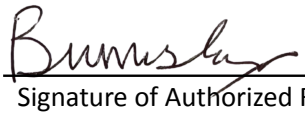
STATEMENT OF ASSURANCES

As the authorized representative of the sponsor applying to open a charter school in Tennessee, I hereby certify that the information submitted in this application 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 must comply with all assurances within this section, and all applicable state and federal laws and regulations related to public charter schools. Furthermore, the governing body of the proposed charter school hereby assures that it accepts full legal and financial responsibility for the operation of the school.

I affirm that the public charter school will:

1. Be operated by a not-for-profit organization that is exempt from federal taxation under § 501(c)(3) of the Internal Revenue Code (26 U.S.C. § 501(c)(3));
2. Operate as a public, nonsectarian, non-religious public school, with control of instruction vested in the governing body of the school under the general supervision of the authorizer and in compliance with the charter agreement and the Tennessee Public Charter Schools Act;
3. Follow all federal, state, and local laws and regulations pertaining to the operation of a public charter school, unless waived according to T.C.A. § 49-13-111(p);
4. Provide special education services for students with disabilities as provided in T.C.A. Title 49, Chapter 10, Part B of the Individuals with Disabilities Education Act, Title II of the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973;
5. Adhere to applicable state and 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;
6. Offer curriculum, textbook, and instructional materials that meet state and federal requirements, including that they are aligned to state academic standards (T.C.A. § 49-6-2202), do not include or promote prohibited concepts (T.C.A. § 49-6-1019), were not created to align exclusively to the Common Core State Standards, and are not marketed as Common Core textbooks or materials (T.C.A. § 49-6-2202);
7. 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;
8. Follow non-discriminatory admission policies pursuant to T.C.A. § 49-13-107, and processes for conducting an enrollment lottery, if applicable, in alignment with T.C.A. § 49-13-106 & 113 and State Board Rule 0520-14-01-.04;
9. Maintain a school term of no less than two hundred (200) days, including one hundred eighty (180) days for classroom instruction, pursuant to T.C.A. § 49-6-3004;
10. Ensure each instructional day consists of the minimum requirements, pursuant to T.C.A. § 49-6-3004, T.C.A. § 49-6-201, and State Board Rule 0520-01-02-.31(1);
11. Utilize this application as a contract with the authorizer, if no other agreement is signed, pursuant to Tennessee Attorney General Opinion No. 10-45;

12. Exclusively employ teachers who hold an active teaching license and any appropriate endorsement(s) to teach in a public school in Tennessee;
13. Comply with Open Meetings and Open Records laws (T.C.A. §§ 8-44-101 et seq.; 10-7-503, 504);
14. Not charge tuition, except for students transferring from another district to the school pursuant to the local board's out-of-district enrollment policy and T.C.A. § 49-6-3003;
15. Not charge registration fees or enrollment fees, except as authorized by T.C.A. § 49-13-106;
16. Follow state financial (budgeting and audit) procedures and reporting requirements according to T.C.A. §§ 49-13-111, 120, and 127;
17. Require governing body members, employees, officers, and other authorized persons who receives funds for the charter school, has access to the charter schools' funds, or has authority to make expenditures from the charter schools' funds, to give a surety bond in the form prescribed by T.C.A. § 8-19-101; and
18. Maintain all necessary and appropriate insurance coverage;
19. Notify its authorizer immediately of any change in circumstances that may have a significant impact on the school's ability to fulfill its goals as stated in its charter agreement; and
20. Submit to its authorizer a request to amend its charter agreement for any material modifications as defined by the charter agreement and TN Public Charter Commission rules.



Signature of Authorized Representative

1/24/2026
Date

Burrus Cox
Printed Name of Authorized Representative

Executive Partner
Title of Authorized Representative

WAIVERS (OPTIONAL)

Pursuant to T.C.A. § 49-13-111, a sponsor of a proposed charter school may apply to either the authorizer or to the Commissioner of Education for a waiver of any State Board Rule or statute that inhibits or hinders the proposed charter school's ability to meet its goals or comply with its mission statement.

Waivers may not be granted for requirements related to:

- Federal and state civil rights;
- Federal, state, and local health and safety;
- Federal and state public records;
- Immunizations;
- Possession of weapons on school grounds;
- Background checks and fingerprinting of personnel;
- Federal and state special education services;
- Student due process;
- Parental rights;
- Federal and state student assessment and accountability;
- Open meetings; and
- At least the same equivalent time of instruction as required in regular public schools.

Authorizers and the Commissioner of Education have discretion to approve or deny a waiver request. While approval decisions may vary among authorizers, the list below includes commonly requested waivers by charter school sponsors and operators. Statute references are current as of the publication of this document and are subject to change.

- Contracts and Employment Termination (T.C.A. § 49-5-rr8-409)
- Duty Free Lunch (T.C.A. § 49-1-302(e))
- Leave (T.C.A. § 49-5-702-716 and T.C.A. § 49-5-801-816)
- Library Information Center (State Board Rule 0520-01-03-.07)
- Licensed Personnel Salaries (T.C.A. § 49-3-306(a), State Board Rule 0520-01-02-.02 and State Board Policy 5.600)
- Teacher Assignment (T.C.A. § 49-5-401)
- Tenure (T.C.A. § 49-5-501-513)
- Use of Unapproved Textbooks and Instructional Materials (T.C.A. § 49-6-2206-2207)

Proposed Waiver Requests

Sponsors planning to apply for one or more waivers must complete the following table, adding rows as needed. Note that the information included in this table is for the purposes of contextualizing the sponsor's charter school application only and does not constitute a formal waiver request. There is no guarantee that authorizers or the Commissioner of Education will approve the waivers included here, and approval of this application does not indicate or constitute approval of waiver requests.

Waiver requests will be finalized during the contracting process and must be included in an approved charter agreement pursuant to T.C.A. § 49-13-110. Additionally, charter school operators may request a waiver at any time during the school's operation.

While this section is not a scored component of the application and will not be used as a determining factor in an authorizer's decision to approve or deny a sponsor's application to operate a charter school, authorizers may choose to discuss waiver requests during the capacity interview.

Proposed Waiver Requests		
Identify the statute or State Board rule for which the sponsor plans to submit a waiver.	Describe the statute or rule the sponsor wants to waive.	Explain how the statute or rule inhibits or hinders the sponsor's ability to meet its goals or comply with its mission.
T.C.A. § 49-6-2206	Use of unapproved textbooks and instructional materials.	As written, the statute requires exclusive use of state-approved instructional materials as the primary instructional vehicle, which limits The Gate School's instructional model in service of its mission to provide rigorous, engaging, and meaningful learning experiences for all students. The Gate School's approach emphasizes strong literacy development, discussion based learning, authentic learning tasks, and deep student engagement, which are central to achieving its academic and instructional goals. Reliance solely on currently approved instructional materials constrains the school's ability to deliver instruction in a manner fully aligned to this model.

EDUCATIONAL PROGRAM DESIGN & CAPACITY

School Overview

Question 1: In 2-3 paragraphs, describe the overall vision for the proposed school. Include relevant details such as the academic focus, the students it will serve, and what success will look like.

The Gate School, serving middle school students in Nashville, is built on two convictions: (1) every student is capable of academic excellence; (2) nothing inside a school unlocks that potential more consistently than excellent teaching. Decades of research[1] confirm what our founding team has seen firsthand: teacher effectiveness is the single most significant in-school factor influencing student outcomes. Our vision is to make excellent teaching the standard every student experiences, every day.

That vision requires more than layering programs onto a traditional model; it requires redesigning how schools organize adults. The foundation of The Gate School is the Teaching Firm, a staffing structure in which every instructional leader teaches students daily while sharing responsibility for leadership and operations. In traditional schools, strong teachers are promoted out of the classroom and leadership becomes disconnected from instruction. The Teaching Firm reverses that dynamic: our most experienced educators remain with students, decisions stay grounded in the classroom, and teachers can grow in responsibility, leadership, and pay — 20–30% above neighboring schools — without leaving the classroom. The result is a different distribution of talent, where excellent teaching is concentrated and extended so that every student consistently experiences high-quality instruction.

On our foundation, classrooms are designed to make student thinking visible and rigorous through daily discussion-based learning. Using a Harkness model, students engage in structured academic conversations where they explain their reasoning, challenge ideas, and revise their thinking based on evidence and feedback. Success is defined not by participation or compliance, but by the quality of thinking students make visible each day. Too often, the experiences that drive this kind of growth — rigorous discussion and access to accelerated coursework such as Algebra I and Computer Science Foundations in middle school — are reserved for a select few rather than made the standard for all. The Gate School is designed to make them the standard for every student. To support and accelerate this work, The Gate School integrates artificial intelligence as a tool for feedback and personalization. It is not a replacement for teaching, but instead increasing the speed, precision, and frequency of feedback so students engage in more cycles of revision and deeper thinking within each lesson.

Success at The Gate School will be evident in classrooms where students make their thinking visible, challenge ideas, and improve their reasoning each day. Students will leave prepared not just to succeed in high school, but to think critically, communicate clearly, and engage with complex ideas at a high level. This will be made possible by a school deliberately designed around excellent teaching, where exceptional educators remain at the center of the work and their impact is extended to every student. At The Gate School, high-quality teaching is not left to chance or assignment. It is the standard every student experiences, every day.

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[1] An effective teacher for every student

School Mission and Model

Question 2: Provide the mission statement for the proposed charter school.

Mission

The Gate School cultivates student independence, effective communication, and academic excellence in the middle grades through outstanding teaching and purposeful use of technology, preparing every student for success in high school and beyond.

Living the Mission

We hold ourselves accountable through clear, measurable outcomes that ensure students are not just engaged, but growing across all aspects of our mission. A detailed set of aligned metrics and targets are outlined in Question 3.

Question 3: Describe any mission-specific short- and/or long-term educational goals and targets that the school will have and how internal and external stakeholders, including the public, will know the extent to which the school is achieving its mission.

Mission Alignment	Goal	Data	Target
Student Independence	8th graders present capstone projects to a variety of stakeholders.	Presentation	100%
	Families agree or strongly agree to the survey prompt: *My child is becoming more academically independent (e.g., managing assignments, seeking help appropriately, and taking ownership of learning).*	Semester parent survey	85%
	Students take ownership of their learning by attending school consistently.	SIS / TDOE Report Card	ADA ≥ 95%
	Students are present to learn consistently at high levels.	SIS / TDOE Report Card	Chronic absenteeism < 10%
Effective Communication	Student performance on Harkness Discussion Rubric (**Question 27**).	Gradebook	80%
Academic Excellence	Highly Rated School	TDOE Report Card	A/B Grade
	Students meet or exceed expectations in ELA/Math	TCAP	50%
	Students will meet or exceed their individualized NWEA MAP growth targets in both math and ELA annually.	NWEA MAP	70%
	Students earn HS credit in at least two courses by the end of 8th grade.	SIS/ Transcripts	80%
	Level 4-5 growth for highest needs students (based on the TDOE Report Card Metrics).	TDOE Report Card	Level 5

<table>
<tr><td rowspan="3">Outstanding Teaching</td><td colspan="2">Level 4-5 Yearly Growth</td><td>TVAAS</td><td>70%</td></tr>
<tr><td colspan="2">Level 3 on TEAM</td><td rowspan="2">TEAM Observations</td><td>100%</td></tr>
<tr><td colspan="2">Level 4-5 on TEAM</td><td>60%</td></tr>
<tr><td rowspan="2">Purposeful Use of Technology</td><td rowspan="2">Stakeholders agree or strongly agree to the survey prompt:</td><td>For Staff: “AI makes my work more effective and sustainable.”</td><td rowspan="2">Annual survey</td><td>85%</td></tr>
<tr><td>For Students:“I feel confident using AI responsibly to support my learning and thinking.”</td><td>85%</td></tr>
<tr><td>High School of Choice</td><td colspan="2">Students enter a high-quality high school that combines rigorous academics, strong student supports, and demonstrated outcomes, ensuring students enter ninth grade on track, remain engaged, and graduate prepared for college, career, or credential pathways.</td><td>School high-quality framework</td><td>80%</td></tr>
</table>

Assessing Progress and Communicating Results

The Gate School will assess progress toward its mission through clear, recurring data reviews and transparent communication with staff, families, the board, and the public.

Internal Monitoring

- **Weekly**: Instructional teams review student work, discussion performance, formative assessments, and RTI data to adjust instruction and support.
- **Biweekly**: Instructional Partners and Associates review coaching data, classroom observations, and student progress to ensure instructional quality and consistency.
- **Quarterly**: The Partner team reviews mission-aligned indicators including academic outcomes, student independence measures, attendance, culture data, and staff retention.

To support this work, The Gate School will use Colleague AI to consolidate data from our SIS and LMS into clear dashboards that surface trends, flag concerns early, and support timely decision-making. The platform is a tool to support, not replace, leadership analysis and professional judgment.

Board Oversight

- The Board receives a mission-aligned performance dashboard at least three times per year.
- The dashboard includes progress on academic achievement, teaching quality, student independence, high school readiness, and staff sustainability.
- Any goals that fall below target require a clear corrective action plan and timeline, which is reviewed with the Board.

Family and Community Communication

- Each week, families receive printed and digital “Path Reports” transparently sharing their child’s progress towards academic goals. They will also have logins to Colleague AI to access real-time progress data at any time.
- Families receive semester updates that include academic progress, discussion and communication growth, and indicators of student independence.

- By 8th grade, students will lead their own quarterly conferences, sharing evidence of learning and growth in alignment with our commitment to independence.
- Capstone exhibitions and public student presentations provide visible, authentic evidence of learning and readiness for high school.
- Annual family survey results are shared transparently, along with leadership's response and any resulting changes.
- Twice per year, the partners at The Gate School will host a town hall meeting for families and community members to communicate progress toward annual mission-driven goals, leveraging key data from the board's performance dashboard.

Staff Communication and Feedback

At The Gate School, understanding progress to our mission and goals is a collaborative process with staff. Our strategic staffing model ("The Teaching Firm") is built on shared ownership of the mission, making progress monitoring and communication intentionally two-directional.

- Through weekly Staff PD and a staff newsletter, Partners share progress toward teamwide quarterly focus goals aligned to the mission, reinforcing shared ownership and transparency around schoolwide performance.
- Quarterly Data Days are a key lever where each instructional staff member shares their progress towards goals and actively collaborates to surface best practices and co-construct action plans to address challenges (see more detail in question 43).
- All staff members will be invited to share their feedback on the ways we are living out our mission and progressing towards our goals formally via quarterly staff surveys. Key data insights from those surveys will be shared transparently through Staff PD and team members will be included in actively problem solving ways we can continue to grow.
- Annually, all staff members contribute to strategic planning through end-of-year reflections and data analysis to inform planning for the following year.

Public Transparency and External Communication

The Gate School believes that progress toward its mission should be visible not only to internal stakeholders, but also to families considering enrollment, community members, authorizers, and the broader public. To ensure transparency and accountability, the school will communicate progress toward mission-aligned goals through multiple public-facing channels:

- **Public Mission Dashboard:** The Gate School will maintain a publicly accessible section of its website that includes a concise annual mission dashboard. This dashboard will report progress on key indicators aligned to the school's mission, including academic outcomes, student independence, effective communication, teaching quality, and high school readiness. The dashboard will be updated annually and reviewed by the Board prior to publication.
- **Annual Impact Report:** Each year, The Gate School will publish an Annual Impact Report summarizing progress toward its mission-specific goals, key academic and culture data, and reflections on areas of growth. This report will be shared publicly on the school's website and with community partners.

- **Public Board Materials:** Board agendas, approved minutes, and high-level performance summaries will be posted publicly in accordance with open meetings requirements, providing transparency into governance and oversight of mission-aligned outcomes.
- **Website and Enrollment Materials:** The school's website and enrollment materials will clearly articulate mission-aligned goals and targets, as well as how progress is measured, so that prospective families understand both the school's commitments and how success is defined.
- **Community Events and Exhibitions:** Capstone exhibitions, public student presentations, and family town halls serve as visible demonstrations of student learning, communication skills, and readiness for high school, reinforcing accountability to the broader community.

Together, these mechanisms ensure that internal monitoring is paired with public transparency, allowing all stakeholders to understand the extent to which The Gate School is achieving its mission.

Question 4: Describe how the sponsor assessed the need for the proposed school, including considerations around availability of school choice options in the community, capacity, and number and quality of available seats.

Demonstrated Need for the Proposed School

Overview of the Local Context

The Gate School is a proposed diverse-by-design public charter middle school serving students in grades 6–8 from Davidson County. Nashville's public school system reflects tremendous racial, linguistic, and learner diversity:

	Black or African American	Hispanic/ Latino	White	Asian	English Learners	Students with Disabilities
% of Population	38.29%	34.05%	23.48%	3.71%	31%	14%

The Gate School conducted a structured needs assessment using multiple data sources, including the MNPS Open Data Portal, 2024–25 TNReady/TCAP proficiency and success rate data, enrollment and projection reports, and research from The Scarlett Foundation and the Diverse Charter Schools Coalition. We analyzed districtwide trends, subgroup outcomes, the number and percentage of quality seats, cluster-level performance in the Lawson, Hillsboro, and Pearl Cohn clusters, and enrollment/attrition patterns between elementary and middle school. This analysis guided our determination that West Nashville, particularly Bellevue, faces a severe shortage of high-quality, diverse-by-design middle school options and that an additional public charter school is needed to meet current and projected demand.

This diversity is a tremendous asset for Nashville, but it is not consistently leveraged to create inclusive, integrated middle school environments that deliver strong outcomes for all students. The Gate School is specifically designed to respond to this context through a diverse-by-design model, leveraging AI-supported personalized learning, inquiry-based instruction, and unified staffing to ensure rigorous outcomes for every learner.

Nashville's west corridor, including Bellevue and the surrounding neighborhoods, is experiencing rapid population growth and shifting student demographics. **Two major housing developments alone illustrate the pace of change: 8200 McCrory (opened 2023 with 329 units) and McCrory Flats (opened 2025 with 251 units).** These developments have expanded the number of school-aged children in the area and are contributing to increased enrollment at local feeder schools.

Enrollment Growth and Capacity Pressures[2]

School	2023-24 Enrollment	2025-26 Enrollment	% Enrollment Increase
Harpeth Valley Elementary	745	831	12%
Bellevue Middle	403	490	22%
James Lawson High	1204	1462	21.4%

Building Capacity Utilization in the Bellevue Feeder Pattern[3]

School	Role in Feeder Pattern	Building Utilization
Harpeth Valley Elementary	Feeder to Bellevue Middle	107%
West Meade Elementary	Feeder to Bellevue Middle	114%
Bellevue Middle	Receiving Middle School	93.5%

Both elementary feeders to Bellevue Middle are currently operating above building capacity, while Bellevue Middle itself is approaching capacity at 93.5%. Given the accelerating residential development described above and the larger cohorts already enrolled at the feeder elementaries, the geographic catchment served by Bellevue Middle is on a near-term trajectory to exceed available seat capacity at its only zoned middle school option.

Changing Demographics and Rising Need[4]

Harpeth Valley Elementary			
Category	**2023**	**2025**	**% Increase**
Black/African American	112	183	**63%**
Economically Disadvantaged (ED)	78	99	**27%**
Students With Disabilities (SWD)	112	120	**7%**
Bellevue Middle			
Category	**2023**	**2025**	**% Increase**

[2] Open Data Portal - Metropolitan Nashville Public Schools (November 2025)
[3] MNPS Building Capacity (January 2026)
[4] Open Data Portal - Metropolitan Nashville Public Schools (November 2025)

Black/African American	123	171	**39%**
Economically Disadvantaged (ED)	89	105	**18%**
Students With Disabilities (SWD)	68	82	**21%**

James Lawson High School			
Category	**2023**	**2025**	**% Increase**
Black/African American	417	594	**42.4%**
Economically Disadvantaged (ED)	304	326	**7.2%**
Students With Disabilities (SWD)	178	213	**19.7%**

These trends signal that the area's middle schools are serving a student population with increasingly diverse learning profiles, greater academic need, and higher demand for strong, inclusive Tier 1 instruction. They also point to the need for more high-quality seats, particularly for students who historically face barriers to accessing rigorous learning experiences.

Academic Performance

While Bellevue Middle's overall proficiency is close to district averages, students who are economically disadvantaged and students with disabilities are performing substantially below district and state peers. These gaps are not marginal. They are deep, persistent, and directly relevant to the need for an additional, programmatically distinct middle school option.

ELA: 2024-2025 TCAP Proficiencies[5]			
School / Level	**All Students**	**Economically Disadvantaged**	**Students w/ Disabilities**
Bellevue Middle	33.8%	15.4%	13.1%
District (6-8)	31.20%	15%	10.7%
State (All grades)	40.9%	24.2%	12.6%

Key Findings

- Bellevue's overall ELA proficiency remains below the state average, with only 33.8% of students proficient compared to 40.9% statewide.
- Fewer than 1 in 6 economically disadvantaged students are proficient in ELA, showing a continued need for stronger literacy support and acceleration.
- Economically disadvantaged students score well below the state average, trailing economically advantaged students statewide by 8.8 points.

Math: 2024-2025[6] TCAP Proficiencies			
School / Level	**All Students**	**Economically Disadvantaged**	**Students w/ Disabilities**
Bellevue Middle	32%	12.9%	15%
District (6-8)	29.3%	15.6%	10%
State (All grades)	38.9%	22.2%	12.2%

[5] TDOE Achievement Rate for ELA (November 2025)
[6] TDOE Achievement Rate for Math (November 2025)

Key Findings

- Overall math proficiency remains below the state average, with only 32.0% of students proficient compared to 38.9% statewide.
- Fewer than 1 in 8 economically disadvantaged students are proficient in math, showing a significant need for stronger middle school math acceleration.
- Economically disadvantaged students score below both district and state averages, trailing the district by 2.7 points and the state by 9.3 points.

Districtwide Student Achievement: Declines and Gaps in Middle Grades[7]

Declining Proficiency from Elementary to Middle School

MNPS 2024-2025 performance data reveal a troubling decline in academic proficiency as students progress through school. TGS addresses this need by ensuring middle school becomes a period of acceleration supported by high-quality teaching, collaborative inquiry-based learning, AI-powered personalized instruction, and a commitment that all students complete at least 2 high school credits by 8th grade.

School Level	ELA Proficiency (%)	Math Proficiency (%)	Total Students
Elementary	35.5%	36.5%	39,998
Middle	27.4%	29.3%	15,915
High	33.9%	22.3%	22,881

Quality and Availability of School Seats

Districtwide Quality Seat Analysis

For the purposes of this analysis, high-quality seats are defined as seats in schools with at least 40% proficiency in Math or English Language Arts, or an overall TCAP success rate of at least 40%.

Sector	Number of Schools	Seats	Quality Seats	% of Quality Seats
MNPS	30	11,930	1,845	15.5%
Charter	15	4,465	2,267	50.8%
Total	45	16,395	4,112	25.1%

Key Findings

- Only 25% of seats are quality.
- Only 15.5% of MNPS seats meet quality thresholds
- Families lack sufficient high-quality middle school options

Cluster-Level Analysis in Target Area (Lawson, Hillsboro, Pearl Cohn)[8]

Because TGS will be in West Nashville's community, we analyzed performance and seat quality in the clusters TGS will serve using the 24-25 TDOE Report Card data.[9]

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[7] Metro Nashville Public Schools | About This District: (November 2025)
[8] Metro Nashville Public Schools | About This District: (January 2026)
[9] Bellevue Middle | School Letter Grades (January 2026)
* Indicates having magnet programs

School	School Type	Cluster	Proficiency (%)		Success Rate (%)	Letter Grade	Quality Seats
			ELA	Math			
H.G. Hill Middle	Zone	Lawson	25	21.7	26.1	C	0
Bellevue Middle	Zoned	Lawson	32.7	28.8	35.8	D	0
John Early	Zoned	Pearl Cohn	5.7	10.2	10.7	C	0
Moses McKissack	Zoned	Pearl Cohn	9.9	7.2	9.8	C	0
Nashville Prep	Charter	Pearl Cohn	9.9	13	13.5	F	0
LEAD Cameron	Zoned	Pearl Cohn	15.8	22.5	21.6	C	0
HEAD Middle	Magnet	Hillsboro	52	52	55	A	340
J.T. Moore*	Zoned	Hillsboro	51.8	60.7	59.3	B	518
West End*	Zoned	Hillsboro	43	38.4	43.3	B	295

Key Finding

- Across these three clusters, **only 34.7% of seats qualify as high quality**, and in Bellevue specifically, 0% of seats meet the quality criteria[10].

School Choice Availability in the Target Area

Families in the Lawson, Hillsboro, and Pearl Cohn clusters have access to multiple district and charter schools, but high-quality options are limited. Of the three schools in the broader area that meet our quality criteria, two are magnet programs (J.T. Moore – IB and West End – STEM) and one is a magnet school (HEAD Middle), all of which require competitive application or lottery processes and often longer commutes. In Bellevue, no existing middle school offers quality seats by our criteria, forcing families seeking a rigorous option to leave their neighborhood, navigate selective choice processes, or exit MNPS altogether. These magnet and specialty options are not equitably accessible for many economically disadvantaged families, English learners, or students with disabilities due to selective entry requirements, transportation distance, and competitive lotteries.

Bellevue Reality
Zero quality middle school seats exist in the community where TGS will locate.

Enrollment, Capacity, and Family Demand

Middle School Attrition Across MNPS

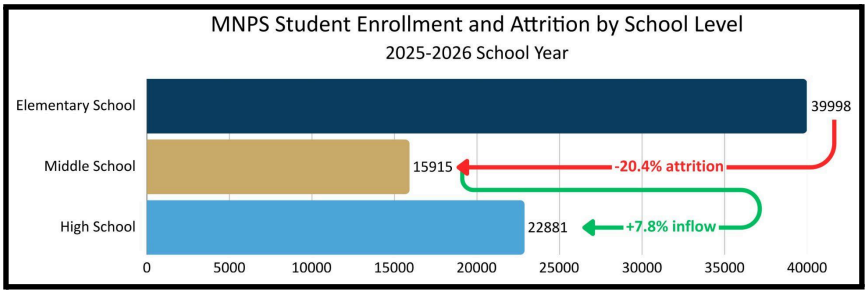
Enrollment analyses[11] show significant attrition between elementary and middle school, reflecting families' lack of confidence in current middle school options. District 8 loses 47% of students per grade at the transition, District 9 loses 22%, and approximately 1,300 students leave MNPS between elementary and middle school each year. This attrition is concentrated specifically at the elementary-to-middle grade transition rather than distributed across grade

[10] We defined "quality seats" as Schools with at least 40% proficiency in Math or English Language Arts, or an overall TCAP success rate of at least 40%. Based on the data this also is supported by schools with at least a B rating.
[11] Open Data Portal - Metropolitan Nashville Public Schools (November 2025)
* Indicates the school having magnet programs

Family Choice Signal

Families are voting with their feet and leaving MNPS middle schools at high rates.

levels — a grade-specific pattern consistent with families making active, school-driven decisions at a single inflection point, distinct from broader demographic or mobility trends that would affect enrollment across all grades**.** MNPS attrition reports indicate that families leaving district middle schools disproportionately enroll in magnet programs, charter schools outside their cluster, or private schools, reflecting a clear lack of confidence in available neighborhood options.



[12]

Existing Charter Schools in the Target Area

The Gate School's needs assessment accounts for existing and planned charter school options in and near West Nashville. While several charter schools operate in the broader area, they do not eliminate the specific middle school need identified in this application.

Two existing charter schools currently serve middle grades in the broader Pearl-Cohn cluster, but their current academic outcomes do not close the quality-seat gap identified in this analysis. Two other charter schools are approved to grow into later grades, but based on their current grade-growth timelines, they are not projected to serve 6th grade by The Gate School's proposed opening year. Another nearby charter school currently serves only elementary grades.

Taken together, the existing and planned charter landscape does not provide sufficient high-quality middle school capacity for West Nashville families during The Gate School's launch window. The Gate School is designed to address that gap by offering a rigorous middle school option focused on strong teaching, effective communication and purposeful use of technology beginning with 6th grade in 2027.

Enrollment Projections Indicate Growing Middle School Demand

Following MNPS's districtwide transition of middle schools from grades 5–8 to grades 6–8 beginning in the 2023–24 school year, the 2023–24 represents the first comparable baseline year for analyzing middle school enrollment trends. Based on an analysis of publicly available MNPS enrollment data[13], middle school enrollment increased between 2023–24 and 2025–26 school years in both target districts. District 8 middle schools experienced a 6.6% increase, while District 9 middle schools grew by 9.8% over the same period. This growth outpaced elementary

[12] Open Data Portal - Metropolitan Nashville Public Schools (November 2025)
[13] Open Data Portal - Metropolitan Nashville Public Schools (November 2025)

enrollment trends in the same clusters, indicating increasing demand for middle grades seats and growing pressure on the availability of high-quality middle school options.

Diverse-by-Design: A Model Aligned to Community Need

Nashville's diverse student population requires schools designed to ensure equitable access to excellent education. Research[14] from the Diverse Charter Schools Coalition indicates that 80% of diverse-by-design schools outperform neighboring district schools in ELA and 82% outperform in Math. Current District 9 middle schools are not closing gaps for economically disadvantaged students, English learners, and students with disabilities. Given that more than 70% of MNPS students identify as students of color and 31% are English learners, Nashville's demographics require a model that leverages diversity as an instructional asset rather than treating it as an operational challenge.

The Gate School's model is designed to meet its diverse by design student body through:

- **High quality instruction** grounded in strong content, effective teaching, and consistent expectations
- **Rigorous and equitable access to advanced coursework**[15], ensuring all students can engage in challenging academic pathways with appropriate supports
- **Discussion based learning through the Harkness method,** leveraging diverse perspectives to build critical thinking, communication, and belonging
- **A commitment driven school culture**[16] that supports every community member, including students, families, and staff, to feel safe, affirmed, and known

Summary of Need

The assessment of need including academic performance, subgroup outcomes, quality seat availability, cluster level analysis, enrollment trends, and research on effective diverse by design models demonstrates strong demand for an additional high quality middle school in West Nashville, particularly in Bellevue where no quality middle school seats currently exist. The Gate School will expand the number of quality seats, increase access to high quality school choice, and offer a rigorous, AI supported, inquiry based learning environment. By ensuring students leave with two or more high school credits and delivering equitable, diverse by design education, TGS will meet this documented need and prepare students to succeed in high school and beyond. The school's location, instructional model, and enrollment design were intentionally developed in direct response to the identified gaps in quality, access, and capacity.

Question 5: Describe the structure of the school day and week for the typical student. Differentiate by grade bands (e.g., K-5, 6-8, 9-12) as needed.

At The Gate School, the daily and weekly schedule supports a discussion driven inquiry model and ensures rigorous, engaging learning throughout the day. Consistent 55 minute core classes allow time for deep thinking and structured inquiry. Seminar, electives, PE, and 8th grade Capstone build communication, research, and executive functioning skills. All grades follow a 6-8 schedule that includes time for intervention, enrichment, and teacher collaboration.

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[14] Diverse Charter Schools Coalition Strategic Plan
[15] Edtrust 5 things to advance equity and success in advanced coursework
[16] Equitable access and opportunity

DAILY SCHEDULE	
All School Days (Grades 6–8)	
Students follow a consistent daily schedule that includes: ● Arrival and breakfast, managed by the Operations team with staff welcoming students ● Four 50-55-minute core academic classes ● One 45-minute RTI (Response to Intervention) block ● One 25-minute daily recess for movement, play, and socialization, identified by families as essential to student well-being	
Monday, Tuesday, Thursday, Friday	**Wednesday (Modified Schedule)**
In addition to the items listed above, full school days include: ● Two 50-55-minute elective blocks	To support weekly teacher professional development, Wednesdays follow a modified early release schedule that includes: ● One 55-minute elective block **Staff Professional Development** ● Weekly development time for teachers to analyze student work, collaborate, and strengthen instructional practices across the school

THE GATE SCHOOL

EXAMPLE WEEKLY SCHEDULE

MONDAY, TUESDAY & THURSDAY		WEDNESDAY		FRIDAY	
7:30 AM	Doors Open	7:30 AM	Doors Open	7:30 AM	Doors Open
7:30 - 7:50 AM	Arrival-Breakfast in Cafeteria	7:30 - 7:50 AM	Arrival - Breakfast in Cafeteria	7:30 - 7:50 AM	Arrival - Breakfast in Cafeteria
7:50 - 7:55AM	Transition	7:50 - 7:55AM	Transition	7:50 - 7:55AM	Transition
7:55 - 8:00 AM	Attendance & Announcements	7:55 - 8:00 AM	Attendance & Announcements	7:55 - 8:00 AM	Attendance & Announcements
8:00- 8:55 AM	Period 1	8:00- 8:55 AM	Period 1	8:00- 8:50 AM	Period 1
8:55 - 9:00 AM	Transition	8:55 - 9:00 AM	Transition	8:50 - 8:53 AM	Transition
9:00 - 9:45 AM	RTI	9:00 - 9:45 AM	RTI	8:53- 9:38 AM	RTI
9:45 - 9:48 AM	Transition	9:45 - 9:48 AM	Transition	9:38 - 9:41 AM	Transition
9:48- 10:43 AM	Period 2	9:48- 10:43 AM	Period 2	9:41- 10:31 AM	Period 2
10:43- 10:46 AM	Transition	10:43- 10:46 AM	Transition	10:31- 10:34 AM	Transition
10:46- 11:41 AM	Period 3	10:46- 11:41 AM	Period 3	10:34- 11:24 AM	Period 3
11:41- 11:44 AM	Transition	11:41- 11:44 AM	Transition	11:24- 11:27 AM	Transition
11:44 - 12:30 PM	Lunch/Recess	11:44 - 12:30 PM	Lunch/Recess	11:27- 12:12 PM	Lunch/Recess
12:31 - 1:26 PM	Period 4	12:31 - 1:26 PM	Period 4	12:12 - 1:02 PM	Period 4
1:27-1:30 PM	Transition	1:27-1:30 PM	Transition	1:02-1:05 PM	Transition
1:31 - 2:26 PM	Period 5	1:31 - 2:26 PM	Period 5	1:05 - 1:55 PM	Period 5
2:27 - 2:30 PM	Transition	2:27 - 2:30 PM	Announcements & Dismissal Begins	1:55 - 1:58 PM	Transition
2:31 - 3:26 PM	Period 6			1:58 - 2:48 PM	Period 6
				2:48-2:51 PM	Transition
3:26 - 3:30 PM	Announcements & Dismissal Begins			2:51-3:26 PM	Community Meeting
				3:26 - 3:30 PM	Announcements & Dismissal Begins

Core Classes

The Gate School's daily schedule is designed to support our discussion-driven inquiry model across all core subjects. Each 55-minute block provides the time necessary for students to engage in questioning, reasoning, and evidence-based dialogue.

- **Humanities:** Classes regularly use Harkness-style discussions, text-based seminars, and structured academic conversations. Students analyze complex texts, build arguments, and respond to peers with clarity and evidence.
- **STEM:** Inquiry-based learning drives exploration and discovery. Students investigate problems, test ideas, construct explanations, and engage in collaborative discussion to make their thinking visible.

Across all subjects, teachers use common instructional routines such as questioning, discussion protocols, collaborative reasoning, and evidence use. These shared practices create consistent expectations throughout the day and ensure that each core block reinforces the same habits: ask strong questions, think deeply, communicate clearly, and support ideas with evidence.

Daily RTI: We dedicate a 45-minute daily RTI (Response to Intervention) period to provide targeted, small-group instruction for students needing extra support or enrichment. Because RTI happens schoolwide at the same time for all students, we can flexibly group students across classrooms and grade bands, deploy all available adults (including, but not limited to: Partners, Associates, CTAs, and paraprofessionals), and provide targeted support without pulling students from core instruction. Research[17] on RTI best practices emphasizes that students who make minimal progress with core instruction benefit from consistent, intensive instruction delivered daily in small groups. This structure allows us to monitor progress frequently, regroup flexibly, and intervene early, ensuring that no student falls behind.

Electives Overview

Grade Level	Daily, Grade-Specific Elective	Other Annual Course(s)
6th Grade	Visual Arts	PE and Seminar
7th Grade	Computer Science Foundations	Dance and Seminar
8th Grade	Spanish I	PE and Seminar/Capstone[18]

The Gate School structures electives as a coherent three-year progression, not a set of isolated courses.

- In 6th grade, students take a year-long visual arts course building creative expression, visual literacy, critique, and presentation skills.
- In 7th grade, students complete Computer Science Foundations daily while receiving dance twice weekly during their PE block. This supports fine arts development through rhythm, choreography, collaboration, and performance.

[17] Best Practice for RTI: Small Group Instruction for Students Making Minimal Progress (Tier 3) | Reading Rockets

[18] Fine arts integration is through Seminar and Capstone which includes visual design, music/media, and creative expression

- In 8th grade, students take Spanish I daily while applying fine arts skills through Seminar and Capstone to include visual design, media elements, and creative expression in a public exhibition.

This sequence ensures annual fine arts access while building high school readiness through computer science, world language, research, and public presentation.

Sample Student Schedule for Elective Blocks (6th grade)

	Monday	**Tuesday**	**Wednesday** (modified day)	**Thursday**	**Friday**
Elective Block 1	Fine Arts	Fine Arts	Fine Arts	Fine Arts	Fine Arts
Elective Block 2	PE	PE	-	Seminar	Seminar

Seminar

Seminar is for all grades. Seminar is a core part of The Gate School model and provides a consistent three-year progression in communication, inquiry, and responsible AI use, anchored by a weekly SEL lesson in every grade. The course helps students build the habits required for discussion-based learning and increasing academic independence.

6th Grade: Communication Foundations and AI Basics

Students develop the core skills that make Harkness discussions work: clear speaking, active listening, academic questioning, and evidence-based response. SEL lessons focus on identity, emotional regulation, and healthy peer interactions. Students also build foundational AI literacy, learning how to use modern tools safely and responsibly to support research, brainstorming, and revision.

7th Grade: Inquiry, Research, and Responsible AI Use

Students deepen their questioning and analytical skills through structured inquiry routines and more complex academic discussions. SEL lessons address collaboration, conflict resolution, and growing independence. AI literacy expands to include evaluating AI-generated information, refining prompts, and integrating AI appropriately into multi-step research tasks.

8th Grade: Capstone Preparation and Advanced Inquiry

Seminar shifts toward preparing students for the 8th-grade Capstone. Students practice research methods, argumentation, synthesis of ideas, and public speaking. SEL lessons focus on leadership, agency, and persistence through long-term work. AI literacy becomes applied: students learn to use AI tools strategically for planning, drafting, feedback cycles, and problem-solving within their Capstone pathway.

Fine Arts

Sixth grade students build creative expression, visual literacy, and foundational skills that support future coursework in Visual Arts, PE, and Seminar. Students engage in introductory arts experiences such as drawing, design, movement, performance, and critique. Through these experiences, students enhanced their ability for observation, creative communication, artistic choice, and the ability to revise and execute..

Fine arts function not as a one-year enrichment experience but as a continuous strand—beginning with foundational visual art, continuing through dance and music-connected movement, and culminating in Capstone work that requires students to communicate ideas through visual, oral, written, and creative forms.

Computer Science Foundations

Seventh-grade students complete Computer Science Foundations (G02H14), a high school–credit course that develops programming fundamentals, computational thinking, and responsible technology use. Prior to enrollment in this course, students complete the required middle school Computer Science course, ensuring compliance with state expectations for middle grades instruction. The Gate School has confirmed with the Tennessee Department of Education (TDOE) that this sequencing is allowable. On November 6, 2025, the founding team received written confirmation from the Manager of Computer Science Implementation at TDOE, that students who have completed the required middle school Computer Science course (G25X40/41) may enroll in a high school–level Computer Science course while still in middle school, that the resulting high school credit will follow the student on their high school transcript when a high school course code is used, and that no additional waivers or approvals are required for this approach. This confirmation ensures that The Gate School's Computer Science pathway both satisfies middle school requirements and provides early access to high school credit in alignment with state policy.

Spanish I

Eight grade students take Spanish I daily, earning a high-school world language credit while building foundational communication skills and cultural awareness.

Physical Education

At The Gate School, all students in grades 6-8, receive PE twice weekly, supplemented by a daily recess to ensure additional movement consistent with T.C.A. § 49-6-1021[19] regarding physical activity requirements. PE focuses on fitness, coordination, teamwork, and lifelong wellness, not just sport skills.

Capstone Block

All eighth graders participate in a weekly Capstone block during their **second Seminar period of the week**, a signature component of The Gate School's academic model. Students' Capstone work serves as a culmination of their middle school elective progression, requiring them to apply skills developed through fine arts, computer science, Spanish, Seminar, and core academic coursework. Regardless of pathway, students use visual design, presentation aesthetics, oral communication, and, where appropriate, music, media, and/or creative expression to strengthen the quality and impact of their final public exhibition. Students choose from four pathways (Research & Writing, STEM & Design, Humanities & Social Impact, or Creative Expression) and develop a sustained project aligned to their interests. Each weekly block includes:

- **Mini-lessons** on research methods, argumentation, project management, public speaking, and AI-supported inquiry
- **Studio work time** where students conduct research, draft, revise, or build prototypes with guidance from teachers
- **Reflection and goal-setting**, helping students develop independence, self-monitoring, and persistence

Capstone culminates in a public exhibition where students present their work to families, peers, and community partners. This process teaches students to manage a long-term project, defend

[19] Tennessee Code § 49-6-1021 – Opportunities for Physical Activity

their ideas, revise meaningfully, and communicate with confidence. The Capstone block reinforces The Gate School's core commitments: academic excellence, deep inquiry, responsible AI integration, and the development of self-directed learners prepared to excel in high school.

Community Meeting Block:
Each Friday, The Gate School reserves time at the end of the day for Community Meeting. This block is used in one of two ways: House Team Meetings or all-school assemblies.

During House Team Meetings, students meet in small groups of approximately 20 students with their House Team Leader. The House Team Leader serves as a consistent adult point of contact for students and families, helping monitor student belonging, academic habits, behavior trends, and family communication. These meetings provide time for goal-setting, reflection, relationship-building, culture lessons, and recognition of student growth.

During all-school assemblies, the full school community gathers to celebrate student achievement, reinforce shared values, hear from guest speakers, recognize House Team accomplishments, and build schoolwide identity. Assemblies are used intentionally to strengthen community, communicate priorities, and celebrate the habits and character The Gate School seeks to develop.

Together, these rituals ensure that every student is known well by an adult advocate while also creating regular opportunities for the school to gather around a shared mission and culture.

Anticipated Student Population

Question 6: Describe the anticipated student population, including their anticipated academic and non-academic needs. Describe your methodology and identify your sources for determining these projections.

The Gate School will serve a diverse by design population of 6th-8th grade middle school students from across Nashville, with an intentional focus on creating a community that reflects the full richness of our city. Our target area includes families representing a broad range of racial, cultural, linguistic, and socioeconomic backgrounds, with populations of multilingual learners and students with disabilities. Our diverse student body is a defining strength of our community and an intentional element of our model. We anticipate serving 120 students in Year 1, growing to 360 students at full capacity with 120 students per grade.

Methodology and Data Sources

To determine the anticipated student population and needs, The Gate School analyzed publicly available data from the Tennessee Department of Education (TDOE[20] 2025 Report Card) and MNPS[21] District Enrollment and Accountability Reports (2024–25), supplemented by U.S. Census data[22] for Davidson County. These data informed projections for student demographics, proficiency levels, and attendance trends. Additionally, community engagement surveys conducted during the school's incubation phase have provided qualitative insights into family priorities, access barriers, and desired school features.

Anticipated Student Demographics

The student population of The Gate School will aim to mirror that of the city of Nashville at large as evidenced by the current MNPS District Wide Demographics[23] below:

% of Population by Demographic							
Black or African American	Hispanic/ Latino	White	Asian	American Indian or Alaska Native	Native Hawaiian or Other Pacific Islander	English Learners	Students with Disabilities
38.29%	34.05%	23.48%	3.71%	0.29%	0.18%	31%	14%

Accordingly, based on MNPS demographic trends in our anticipated catchment area, The Gate School projects an incoming student population of approximately 35–40% Black or African American, 30–35% Hispanic/Latino, 20–25% White, 3–5% Asian, and fewer than 1% American Indian, Alaska Native, Native Hawaiian, or Pacific Islander students, with approximately 30–35% English Learners and 12–15% students with disabilities. To achieve this diverse-by-design composition, The Gate School will implement inclusive outreach strategies, collaborate with community organizations across neighborhoods, and ensure equitable access to enrollment information for all families.

[20] Tennessee School Report Cards | 2025 TCAP State Results
[21] Open Data Portal - Metropolitan Nashville Public Schools
[22] U.S. Census Bureau QuickFacts: Davidson County, Tennessee
[23] Open Data Portal - Metropolitan Nashville Public Schools

Where Our Students Are Now

Student Source	Description	Estimated % of Student Body
Zoned MNPS Schools	The Gate School is designed to serve families in West Nashville, where students from neighborhood elementary schools primarily matriculate to Bellevue Middle or H.G. Hill Middle for grades 6–8. Together, these schools serve as the default middle school pathways for much of the Bellevue and surrounding West Nashville communities. While both schools serve important roles in the community, academic outcomes and instructional experiences vary across classrooms and cohorts, and families report differing levels of rigor, consistency, and preparation for accelerated high school coursework. As students transition from elementary school into the middle grades, many families reassess school fit, seeking environments with clearer academic expectations, stronger instructional coherence, and more intentional preparation for high school.	**55–65%**
Existing Charter Schools	Students from charter elementary schools, including both standalone K–5 schools and charter networks with middle grade programs, whose families reassess school fit at the transition to middle school and seek a rigorous, discussion-based program intentionally designed for grades 6–8.	**20–30%**
Private & Independent Schools	Students whose families value strong academics and school culture but, at the middle school transition, face rising tuition, limited seat availability, or seek a rigorous public option intentionally designed for grades 6–8.	**10–15%**

Anticipated Needs

Academic Needs

District-level data shows that academic performance declines sharply in middle school.

Average Student 2025 Proficiency's MNPS by School Level[24]			
Student Group	**Elementary**	**Middle**	**Decline**
ELA Proficiency (%)	35.1	26.9	-8.2%
Math Proficiency (%)	36.6	29.1	-7.5%

This drop suggests that Nashville's middle grades are not effectively building the skills required for high school readiness. Subgroup data shows even larger gaps for economically disadvantaged students, English learners, and students with disabilities.

[24] Tennessee School Report Cards | Metro Nashville Public Schools (January 2026)

Due to the current data, we anticipate a diverse range of academic preparedness:

- **10–15%** will be ready for immediate acceleration and advanced coursework.
- **45–55%** will be at or near grade level but underexposed to deep discussion, inquiry-driven learning, or advanced problem solving.
- **30–40%** will be 1–2 years behind and will require targeted, structured supports to close gaps.

Continued Decline in Math Proficiency from Middle to High School[25]			
Grade Level	6-8	9-12	Decline
Math Proficiency (%)	29.1%	22.3%	-6.5%

Importantly, this pattern does not stabilize after middle school. Math proficiency continues to decline from middle school to high school, dropping further from 29.1% to 22.3%. This sustained decline suggests that gaps emerging or widening in the middle grades are not being systematically remediated in later years, underscoring the importance of early and intentional intervention during grades 6 to 8.

The Gate School's academic model is intentionally designed to interrupt this trajectory through strong and accelerated math pathways that combine high expectations, targeted support, and coherent instruction. By ensuring all students access grade-level and above grade-level math content, paired with differentiated supports and early access to Algebra I and Geometry where appropriate, the school aims to both prevent further decline and create multiple on ramps to high school readiness.

District Wide Proficiency by Subgroup		
Student Group	ELA Proficiency (%)	Math Proficiency (%)
All Students	31.8	29.6
Economically Disadvantaged	17.6	16.4
English Learners (EL)	14.0	18.0
Students with Disabilities (SWD)	7.2	8.0

These patterns show a clear need for stronger grade-level instruction, targeted academic support, and opportunities for accelerated learning in the middle grades.

Non-Academic Needs

To identify non-academic needs specific to the West Nashville and Davidson County families The Gate School will serve, we synthesized insights from our community engagement, including our Student and Teacher Focus Groups (Attachment 1.4), the Bellevue Community Center and McCrory Flats listening sessions (Attachment 1.7), and family surveys completed at community events and camps. The needs identified below reflect themes that emerged most consistently from our targeted community, triangulated with national and district-level research.
Beyond academics, our middle schoolers' success depends on belonging, engagement, and the development of durable skills for future readiness.

[25] Tennessee School Report Cards | Metro Nashville Public Schools

Identified Need: Belonging, Relationships, and School Connectedness

This need was reinforced by families at our Bellevue Community Center listening session, where stronger adult mentorship during the middle school transition emerged as a top priority for the middle school years.

CDC's[26] 2023 Youth Risk Behavior Survey shows:

- Only 50% of students report feeling close to people at school
- 40% experience persistent sadness or hopelessness

TGS Action →

The Teaching Firm model ensures that each student is known by a small, consistent team of expert teachers who teach daily, coach students, and build strong relationships that support both academic growth and personal development. Discussion-based (Harkness) instruction provides daily, structured opportunities for student voice, empathy, and respectful dialogue, while a weekly Seminar develops self-awareness, emotional regulation, and interpersonal skills grounded in real adolescent experiences.

Identified Need: Attendance and Engagement

Chronic absenteeism reaches 20.5 percent in MNPS[27] middle schools. Research[28] shows that chronic absence in grades 6–8 is closely tied to lower eighth-grade achievement and a 17–18 percentage point drop in on-time high school graduation.

TGS Action →

Early identification systems monitor attendance patterns and flag emerging concerns before absenteeism becomes chronic. Strong adult-student relationships enable timely, coordinated responses, while consistently engaging instruction makes classrooms places students want to be. Targeted supports are coordinated across Teaching Firm teams to address disengagement early.

Identified Need: Motivation and Engagement During Early Adolescence

Research from the University of Virginia on the "middle school slump"[29] identifies declines in engagement and motivation during early adolescence, particularly when students lack consistent relationships, clear structures, and meaningful opportunities to participate in learning. Without intentional supports, these declines can affect attendance, effort, and academic persistence. This need was further reinforced by families at our McCrory Flats listening sessions, where parents consistently expressed concern about their children's engagement and motivation during the middle school transition and emphasized the importance of meaningful, relationship-driven learning experiences in keeping adolescents invested in school.

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[26] Youth Risk Behavior Survey Data Summary & Trends Report: 2013-2023
[27] Open Data Portal - Metropolitan Nashville Public Schools (January 2026)
[28] Chronic Absence, Eighth-Grade Achievement, and High School Attainment in the Chicago Longitudinal Study
[29] Research: The Middle School Slump Is Real | UVA School of Education and Human Development

TGS Action →

The Gate School addresses declines in motivation by designing learning that is active, relational, and purposeful. Students engage daily in discussion-based, inquiry-driven instruction that requires preparation, participation, and reflection. Seminar and electives provide structured opportunities for choice, identity development, and skill-building beyond core academics. Through the Teaching Firm model, students are supported by a consistent team of educators who monitor engagement and intervene early, reinforcing effort, persistence, and connection during the middle grades.

Identified Need: Behavioral and Executive Function Support

Family feedback highlights frequent gaps in:

- Organization and planning
- Managing transitions
- Coping with adolescence
- Navigating peer dynamics

TGS Action →

Executive functioning skills are taught explicitly during Seminar and reinforced through predictable routines and clear expectations. Restorative practices emphasize accountability and repair.

Identified Need: Development of Durable Skills

Employers and educators emphasize communication, collaboration, and critical thinking. Research from America Succeeds[30] shows durable skills appear in seven of the ten most requested competencies in job postings.

TGS Action →

Durable skills are built daily through structured discussion, student-led presentations, and AI-enabled feedback that supports reflection, revision, and independence.

Why Our Model Works for All Learners

The Gate School is built to serve a heterogeneous student body through:

- **Discussion-based (Harkness) instruction**, which scaffolds participation so every student builds communication and reasoning skills at their level
- **Accelerated math pathways**, paired with daily intervention and AI-supported practice for students who need foundational support
- **The Teaching Firm Model**, ensuring expert teachers and instructional leaders are directly in front of students every day
- **Purposeful AI use**, enabling rapid feedback, individualized practice, and more teacher time for targeted small groups
- **A strong school culture**, focused on independence, responsibility, and belonging for all students

[30] Durable Skills Framework Starter Edition

Question 7: Complete Table 1 and describe your sources and methodology for determining initial enrollment projections.

Table 1. Projected Enrollment

Grade Level	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Full Capacity
K	0	0	0	0	0	0	0	0	0	0	0
1	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0
6	120	120	120	120	120	120	120	120	120	120	120
7	0	120	120	120	120	120	120	120	120	120	120
8	0	0	120	120	120	120	120	120	120	120	120
9	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0
TOTAL	120	240	360	360	360	360	360	360	360	360	360

For Year 1 (Grade 6), we project enrolling 120 students and adding approximately 120 students each year until we reach full capacity at 360 students. In determining these enrollment projections we have used a combination of census data, district enrollment data, community engagement and demand indicators, and charter sector trends.

- **Census and District Data:** We used U.S. Census Bureau American Community Survey[31] (2019–2023) data to identify the number of middle school–aged children (ages 10–14) in Davidson County and in our primary service ZIP codes (37221, 37209, 37215, and 37218). Together, these areas include roughly 6,000 students in grades 6 through 8, or about 2,000 students per grade level. MNPS data[32] align closely with this estimate.
- **Realistic Market Share:** Charter schools in Nashville typically serve 3 to 5 percent of local eligible students within their first several years. The Gate School's goal of enrolling 120 sixth graders in Year 1, roughly 5 percent of the local cohort, is consistent with this trend and supported by family interest data. As the school grows to full capacity at 360 students, it will continue to serve a modest and achievable share of the local middle school population.
- **Transition Opportunity:** MNPS data[33] show that approximately 1,200 students per year, nearly one in five, do not transition from elementary to middle school within the district. This represents a significant attrition point and a clear opportunity for new, high-quality middle school options. Capturing even 3–5% of these students represents 36–60 families per year, demonstrating that The Gate School's projected enrollment of 120 sixth graders in Year 1 is

[31] Census Data
[32] Open Data Portal - Metropolitan Nashville Public Schools
[33] Open Data Portal - Metropolitan Nashville Public Schools

realistic and attainable within existing unmet demand. The Gate School seeks to re-engage many of these families by offering a rigorous, relationship-centered public school that bridges the critical gap between elementary and high school success.

- **Family Priorities:** Families consistently choose schools that combine academic excellence with a safe, values-driven environment. A national EdChoice survey[34] found that charter school parents prioritize safety (37%), academic quality (36%), and character or values-based instruction (23%)—the very elements at the heart of The Gate School's design. By delivering excellent teaching, a culture grounded in care and integrity, and a purposeful approach to character and technology, The Gate School will meet existing demand while building new trust and excitement among Nashville families.
- **Community Demand:** Community engagement over the past year has confirmed strong demand for a high-quality, relationship-centered middle school in Nashville. Through local community events, family surveys, and informational sessions hosted in partnership with community organizations, more than 123 families have expressed interest in enrolling their children at The Gate School (See **Attachment 1** for details). Many cited limited middle school options, the desire for more collaborative and innovative learning environments, and a need for stronger academic challenge as key reasons for their interest. This feedback mirrors broader trends in the Nashville charter landscape, where new schools with clear academic rigor and strong school culture have consistently drawn full enrollment in their first years. In addition to family outreach, the founding team conducted structured teacher focus groups and individual educator interviews to understand whether the proposed model aligns with educator needs and sustainability. Teachers consistently emphasized the importance of strong instructional systems, meaningful collaboration, clear expectations, and leadership that remains connected to classroom practice. Educators expressed interest in a model that prioritizes teaching quality, shared responsibility for student outcomes, and professional growth pathways that allow teachers to advance without leaving instruction.

The Gate School's enrollment plan is conservative, data-informed, and achievable. It reflects both the local student population and clear family demand for a school that combines excellent teaching with a supportive culture. The projections of 120 students in Year 1 and 360 at full capacity represent a realistic and sustainable path to full enrollment.

Question 8: Complete **Table 2** and describe your sources and methodology for determining initial demographic projections. If the sponsor is proposing to operate an Opportunity Public Charter School, detail the anticipated percent of the student population that will be at risk, as defined in T.C.A. § 49-13-104.

MNPS Student Demographics:

Table 2. Anticipated Demographics	
Student Population*	**Estimated Percent of Total Enrollment at Capacity**
Economically Disadvantaged	34%
Students with Disabilities	14%
English Learners	31%

[34] Beyond Enrollment What Parents Really Want from Their Children's Education - EdChoice

At-Risk *(for opportunity public charter schools only)*	N/A

Methodology and Sources

The Gate School's demographic projections are grounded in the most recent MNPS[35] Open Data and Tennessee Department of Education Report Card datasets, which provide verified middle school demographic averages across Davidson County. These district-level benchmarks offer a reliable foundation for projecting a representative, diverse student population. To confirm alignment with broader regional trends, The Gate School also reviewed U.S. Census[36] Bureau Survey estimates for Davidson County, which show consistent patterns of economic diversity, language variation, and rates of students with disabilities.

Because The Gate School is intentionally diverse-by-design, its enrollment strategy will focus on attracting families from across Nashville, ensuring a balance of socioeconomic, linguistic, and cultural backgrounds reflective of the city's public middle school population. This approach is both equitable and realistic, aligning with the composition of high-performing, inclusive public charter schools across the region.

Question 9: Describe the proposed school's plan to recruit students both before and after the school has opened.

Pre-Opening Recruitment

Our pre-opening recruitment efforts prioritize gathering a broad range of family perspectives and creating accessible opportunities to influence the school design. Engagement strategies are intentionally designed to build trust and authentic relationships through free experiential programming, trusted parent ambassador networks, neighborhood-based engagement, multilingual communication, and sustained family partnership. See attachment 1 for evidence.

Phase / Timeline	Key Activity	Purpose	Lead / Team	Partner(s)	Anticipated Reach / Goal
Spring 2025-Present	**Community Listening Tours**	Gather community input to inform design and build trust	Founding Team	Non-Profit orgs, neighborhood groups	100+ families engaged
January 2026	**Free AI Literacy Camp**	Introduce families to our academic model and values	Founding Team	Ensworth	20+ students, 30+ families engaged
Spring 2026 – Fall 2026	**Free Tutoring Sessions**	Strengthen relationships and demonstrate instructional quality	Founding Team	Wonderfully Made Ministries	25 students served

[35] Open Data Portal - Metropolitan Nashville Public Schools (November 2025)
[36] Census Data

Spring 2026	**Acting Workshop**	Tying our mission around clear communication and confidence to student experience.	Founding Team	Nashville Children's Theatre	12 students attended
Fall 2025–Ongoing	**Community Events & Tabling**	Increase awareness and drive interest form submissions	Founder & Volunteers	PROPEL, Bellevue Sports Athletic Association, Elmington Partners	300+ interest forms collected
Winter 2025	**Targeted Marketing Campaign**	Digital + print outreach, with materials in English/Spanish	Marketing Consultant	Local vendors, community partners	Reach 20,000+ impressions
Fall 2026-Summer 2027	**Family Follow-Up & Enrollment Support**	Support families through application & lottery	Executive and Operational Partner	All partners	120 enrolled students (Year 1 target)
Summer 2026	**Summer Camp**	Introduce families to our academic model and values	Founding Team	Encompass Community School, PROPEL	20 rising 4th and 5th grade students

Key Strategies:

Community-Based Listening Tours: Facilitate listening sessions in churches, community centers, and apartment complexes across the catchment area, meeting families in spaces they already trust and reducing barriers to sharing their perspective about what they want for their children's middle school experience.

Experiential Camps and Classes: Offer free, broadly accessible camps and classes that allow families to directly experience aspects of The Gate School's model prior to enrollment decisions. Programming began in January 2026 and will continue through the 2026–2027 school year (see question 12 for specific examples).

Tutoring at Haynes Garden: Provide free on-site small group tutoring within the Haynes Garden community to address immediate academic needs while building authentic relationships with families and community partners.

Parent Ambassador Network: Partner with parents of current 4th grade students across the catchment area to expand outreach through trusted peer relationships. Because families often learn about schools through neighbors, friends, and other trusted community members, parent ambassadors help build authentic awareness and credibility prior to opening by connecting directly with families in their own networks and communities.

Founding Family Meetups: Beginning June 2026 and increasing in frequency through the 2026-2027 school year, we will host community building gatherings with families interested in enrolling in TGS in order to sustain authentic relationships and ensure ongoing family input shapes school design through opening day.

Targeted Neighborhood Canvassing: Conduct door-to-door outreach in neighborhoods closest to the final facility and in communities with historically limited access to high-quality school options, ensuring families have equitable access to enrollment information, application support, and opportunities to learn about The Gate School's model.

Broad Awareness Marketing and Outreach: Utilize bilingual print and digital materials, social media, direct mailers, and community event tabling to ensure families throughout the catchment area have multiple opportunities to learn about The Gate School.

Pre-Opening Benchmarks and Continuous Review

To ensure The Gate School meets its founding enrollment target with a diverse and mission-aligned cohort we have developed a data-driven benchmarking plan.

Monthly Benchmarks: Our team will use the benchmarks outlined below to track progress through the process of enrollment from expressing interest, to completing an application, to fully registering as an enrolled student at The Gate School.

Enrollment Monthly Benchmarks															
Stage		Feb 2026	Mar 2026	May 2026	Aug 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027	Feb 2027	Mar 2027	April 2027	May 2027	June 2027	July 2027
Intent to Enrolls	Target	35	50	75	100	150									
	Actual	44	58	82											
Applications							35	75	110	150	175	200	200	200	200
Enrolled										50	75	100	120	120	120
Wait List													10	20	30

Enrollment Benchmark Notes:

- *Intent to Enrolls are classified as confirmed surveys noting interest in attending TGS by families of students who will be 6th graders in the 2027-2028 school year.*
- *The November launch for applications can be adjusted to align to authorizer expectations and timelines.*
- *A public lottery is held each February for all applicants seeking enrollment for the following school year, and a waitlist is established at that time for applicants not offered a seat in the initial draw*
- *Enrolled students are classified as students who are fully registered.*

Review Cadence: Founding team will meet biweekly to review data updates, analyze progress towards goals, and establish short cycle action steps to stay on track to enrollment benchmarks.

Contingency Plan: If metrics fall below 80% of monthly targets:

- Analyze the action steps that have yielded the most applicants leads to understand what is working and replicate and/or increase capacity aligned to those strategies.
- Increase neighborhood canvassing and digital outreach.
- Schedule additional listening sessions and family information events.

- Expand bilingual communication to reach underrepresented families.

Post Opening Recruitment Plan

After The Gate School opens, our recruitment efforts will focus on maintaining strong enrollment and deepening community relationships through authentic, experience-based engagement. We believe the most powerful recruitment strategy is a great school that families want to share, and our ongoing outreach will reflect that philosophy.

Key Strategies:

- **Family Ambassador Program:**
  - Annually recruit 3-4 parent ambassadors from varied neighborhoods and backgrounds to share their experiences about The Gate School and invite new families through trusted peer-to-peer relationships. Support ambassadors with resources and training to support in the front lines of community events, tours, and open houses.
  - Encourage current families to share their experiences about The Gate School and invite new families through a user friendly referral program.
- **Annual Camps and Classes:**
  - During the pre-operational phase of recruitment we've seen success in building authentic partnership with families by offering free camps and classes that invite a first hand experience of our team and instructional model. We will continue this strategy by offering 1-2 camps per year and quarterly experiential classes to provide new families recurring opportunities to learn who we are and what we can provide for their children.
- **Open House and Classroom Tours:**
  - Offer regular open houses and school-day classroom visits for parents to engage directly in our school community and instructional model, such as observing harkness discussions or community meetings.
- **Student Showcases and Community Events:**
  - Host exhibitions of student capstone projects.
  - Quarterly award ceremonies celebrating student achievement and growth.
- **Ongoing Family and Community Engagement:**
  - The Director of Operations will maintain communication pipelines and event coordination.
  - Sustain connections with feeder elementary schools and high school partners for continuous enrollment pipeline.
- **Marketing and Retention:**
  - Maintain active presence on social media and local media platforms.
  - Highlight family testimonials, student achievements, and school culture.
  - All postings are multilingual ensuring inclusivity and access.

Director of Operations

The Director of Operations will serve as the primary schoolwide connector between Gate School staff, families, and the community. The Director will oversee family outreach, manage communications, and lead the Family Ambassador Program, equipping parents to share The Gate

School's story. They will also organize open houses, classroom tours, and student showcases while maintaining partnerships with feeder schools and high schools to sustain a strong recruitment pipeline and smooth student transitions.

Post-Opening Benchmarks and Continuous Review

To ensure The Gate School continues to meet enrollment targets with a diverse and mission-aligned cohort we have developed a data-driven benchmarking plan.

- **Quarterly Benchmarks:** Track re-enrollment rates, new applications, family referrals, and event participation.
    - Retention benchmark: maintain 90%+ re-enrollment each year and fill all open seats by the lottery deadline.
- **Review Cadence:** Partner team and Director of Operations will review progress quarterly and adjust strategies proactively to meet goals.
- **Contingency Plan:** If enrollment falls below retention or recruitment benchmarks we will analyze root causes for gaps and refine and revise our approach accordingly. We will customize our strategies aligned to the data on those that have been highest impact, but will likely include a combination of:
    - Social media posts that advertise open seats and call to action to apply
    - Direct mailers to families who have shown interest
    - Tabling at local community events (e.g. farmers markets, family friendly events, local church sponsored events)
    - Canvassing
    - Personal phone calls for prospective families to ask questions about the model
    - Increasing our open house and school tour frequency
    - Direct asks to existing Gate School families and core community partners for referrals in grade levels with open seats
    - Advertising our school events to community partners for a wider net of active engagement at schools sponsored events
    - Expanding outreach to feeder schools and community partners

Together, these ongoing strategies and structures will sustain a strong, mission-aligned student body while reinforcing The Gate School's reputation as a community-centered, high-quality public option for families in Nashville.

Question 10: Describe the proposed school's policy for backfilling open seats, if applicable. If the proposed school does not plan to backfill open seats, explain why not.

The Gate School will maintain an open, transparent, and equitable backfilling policy that ensures access and opportunity for students throughout the school year. In alignment with Tennessee state law and MNPS charter enrollment guidelines, the school will backfill open seats in all grades at any point during the year when feasible.

Implementation Procedures:

- When a student withdraws or does not return, the open seat will be immediately offered to the next student on the grade-level waitlist generated through the annual lottery.

- If the waitlist has been exhausted, the school will publicly reopen enrollment and advertise available seats in compliance with all authorizer and federal non-discrimination requirements.
- Every new student, regardless of entry date, will participate in an accelerated onboarding process that includes:
    - A family welcome meeting and orientation
    - Academic diagnostics in reading and math
    - Connection with house team leader and peer mentor to support social integration
    - Early progress monitoring to identify learning needs and ensure smooth transition

Rationale and Mission Alignment:

Continuous backfilling aligns directly with The Gate School's mission of expanding access to excellent teaching and ensuring that every student in Nashville has the opportunity to thrive.

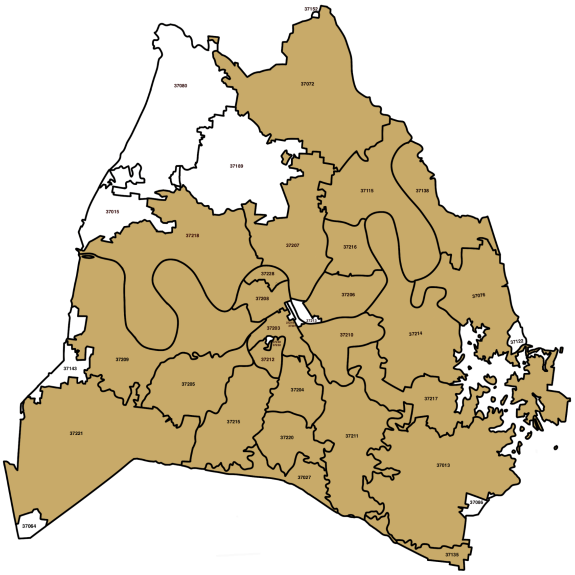
- **Equity and Access:** Every available seat represents an opportunity for a student to join a high-quality public school. Keeping enrollment available year-round ensures that no student is turned away if space becomes available.
- **Belonging and Support:** Through our house team routines and structured onboarding, new students quickly become part of the community and benefit from the same relationships and routines that define The Gate School experience.
- **Academic Continuity:** Teachers and instructional leaders are trained to use diagnostic assessments and differentiated instruction to integrate new students effectively, minimizing disruption to classroom learning while maintaining academic rigor.

This continuous backfilling policy ensures that The Gate School remains both inclusive and responsive to community needs. By combining year-round access with strong student support systems, the school fulfills its mission to open the gate of opportunity to every learner who seeks it, regardless of when they arrive.

Family and Community Engagement and Support

Question 11: Explain how the sponsor has engaged with families and the community about the proposed school. Describe what the sponsor has learned through community engagement activities and how that engagement has informed the application and school design.

The Gate School has engaged deeply and intentionally with families, educators, and community stakeholders throughout the development of its model. From the start, we have prioritized listening first to ensure that the school reflects the aspirations, needs, and values of the community it will serve. To reach a diverse range of families, we implemented a broad range of strategies including 1:1 conversations, community listening sessions, surveys, focus groups, and direct service-based experiences such as free academic tutoring and enrichment camps. These efforts were designed to build authentic relationships, gather meaningful input on middle school priorities, and better understand the opportunities and challenges families experience within existing school options.



At the time of the amended submission, the map to the right illustrates the geographic reach of families who have expressed interest in The Gate School model across Davidson County. To date, 303 community members have completed our Interest and Support Form, **93% of whom reside within Davidson County, with a clear concentration in West Nashville.** That concentration deepens among the families most likely to enroll: of the 204 respondents indicating they would enroll their child, **57% live in core West Nashville**, and among the 82 with a child entering our founding 4th-grade cohort in 2027, **99% live in Davidson County.** The closer the data gets to actual prospective enrollers, the more sharply it centers on the community the school is designed to serve. The geographic distribution of our outreach respondents demonstrates strong concentration within the school's defined catchment area (see catchment map, located in Question 44), particularly among families most likely to enroll in our founding class.

Geographic Distribution of Interest by Cohort

Cohort	n	% in Catchment Area	Davidson County
All form respondents	303	55%	93%
Indicated interest in enrolling	204	65%	94%

Cohort	n	% in Catchment Area	Davidson County
Interested + child entering founding cohort (4th grade)	82	70%	99%

Catchment area as defined by the school's enrollment catchment map (see Question 44), which includes ZIP codes 37015, 37143, 37189, 37205, 37209, 37215, 37218, 37221, and 37228.

The Gate School Family and Community Engagement Strategies

Engagement	Description
Teacher Focus Groups	Proposed Executive Partner Burrus Cox interviewed teachers in focus groups starting in the spring of 2025 to understand the pain points for educators and gather input on the early iteration of The Gate School staffing model, distributed leadership, and strategies for sustaining educators long term.
Student Focus Groups	To inform the early design of The Gate School, the founding team conducted student interviews with current middle school students from diverse backgrounds in Nashville to understand their development and educational needs during these critical adolescent years.
Community Listening Sessions	The Gate School hosted 3 listening sessions directly in communities (e.g. Mccorly Flats, Bellevue Community Center) and will continue this strategy to ensure we are going directly to families and inviting their input early and often.
Stakeholder 1:1 Meetings	To date, The Gate School has facilitated 40+ individual meetings with parents, educators, and community leaders to build relationships and gather in depth qualitative input on the school model and most pressing community needs. Throughout Fall 2025, we reached out to every member of the Metro Nashville Public Schools Board on five separate occasions. To date, we have met with three board members, and had one meeting scheduled that a board member did not attend and has not yet been able to reschedule. The remaining board members did not respond to our outreach efforts.
Free AI/Academic Camps	TGS has hosted and planned free academic enrichment camps, including a January 2026 AI Exploration Camp for 3rd–4th graders and a planned Summer STEM/AI Camp for rising 5th graders, allowing families to experience elements of the academic model firsthand.
Free Academic Tutoring	The Gate School is offering free weekly academic tutoring during the Spring 2026 semester in partnership with Wonderfully Made Ministries, an after-school program serving K–5 students. By providing direct academic support to families before opening, we aim to build trusting relationships and demonstrate our commitment to academic excellence.
Parent Ambassador Committee	TGS is building a Parent Ambassador Committee composed of parents of elementary-aged students who support peer-to-peer outreach and trusted communication within their communities.
Tabling at Community Events	TGS regularly tables at community events, school fairs, and neighborhood gatherings to share information, answer family questions, and invite participation in upcoming engagement opportunities.

Engagement	Description
Family and Community Survey	TGS has distributed surveys at events and through partner networks to collect structured input from families and community members on priorities for middle school education.
Broad Marketing	As a diverse by design school model, we aim to extend our reach across Nashville and therefore know that broad based marketing strategies such as active social model and direct mailers are one way to ensure as many families as possible know about The Gate School as an option for their children.

Key Learning and Application

Student Focus Groups Insights

Our early focus group conversations revealed consistent themes about what helps students learn, belong, and grow during the middle grades. These insights directly shaped The Gate School's academic, cultural, and structural design.

Student Insight	Sample Student Quotes	What This Means	TGS Design Response
Middle school is a critical time for identity, voice, and independence	"Middle school is the time to figure out who you are." "It's a bridge between being a kid and becoming a teenager."	Students need structured opportunities to develop voice, agency, and independence alongside academics.	Structured discussion, Seminar, and an 8th-grade Capstone ensure students regularly practice independent thinking, self-expression, and leadership.
Great teaching combines skill, connection, and authenticity	"A great teacher understands every student is different." "If you can tell they actually want you to learn, it works."	Instructional quality and relational trust are inseparable in the middle grades.	The Teaching Firm model keeps all instructional leaders teaching daily; grounding coaching, feedback, and leadership in real classroom practice.
Students want supportive accountability, not punitive discipline	"Sometimes the consequences feel like shame." "Can you come to us first instead of using it as a threat?"	Discipline systems must teach skills and preserve dignity rather than rely on fear or compliance.	Restorative practices, reflection routines, and skill-based interventions aligned to student development and academic goals.
Voice, choice, and enrichment drive engagement	"I love when I get to speak about something I really believe in." "The joy comes from the people."	Engagement increases when students feel ownership, belonging, and purpose.	Seminar, electives, student leadership opportunities, and public exhibitions of learning embed voice and choice into the academic experience.

Teacher Focus Groups

The Gate School was designed with teachers, not just for them. Educator interviews surfaced a clear message: great teaching thrives when strong systems, high-quality instruction, and collaborative leadership work together. These lessons are embedded throughout the school's staffing structure, professional learning model, and culture systems to ensure teaching excellence is sustainable over time.

Key Educator Insight	Representative Quotes	Implications for School Design at TGS
Great teaching depends on authenticity and collaboration	"I'm myself when I'm teaching." "Watching other people teach and collaborating has been the most pivotal part of my development."	The Teaching Firm model replaces isolated classrooms with shared practice. Daily co-teaching, observation, and planning ensure strong instruction is visible, modeled, and continuously improved.
Teacher sustainability requires feeling valued and growing	"The worst part is feeling drained and like I don't have value." "To do this job for 10+ years, I'd need continual encouragement and collaboration."	Layered roles, protected collaboration time, and growth pathways are designed to reduce burnout, recognize expertise, and make teaching a long-term, sustainable profession.
Adults need preparation for de-escalation and behavior triggers	"We need more training on behavior triggers." "Learning how to de-escalate kids matters."	Professional learning includes explicit training in restorative practices, student development, and de-escalation, grounded in real classroom contexts rather than reactive discipline.
Development must be embedded and practical	"More collaboration would best support my development."	Weekly coaching cycles, reciprocal observations, and team-based planning embed professional learning into daily work instead of isolating it in occasional PD sessions.
Culture is driven by strong teaching and consistent systems	"Systems behind everything matter." "Good teaching is a big part of culture."	The Gate School intentionally integrates culture and instruction through clear, predictable routines and high-quality teaching. Culture leaders teach daily, ensuring expectations, rituals, and restorative practices are modeled in classrooms and reinforced through consistent systems rather than individual personality.

Experiential Family Engagement Learning

AI Literacy Camp

In January 2026, The Gate School hosted its first AI Literacy Camp to engage prospective families and pilot key elements of our academic model focused on AI literacy, student independence, and purposeful technology use. Students participated in hands-on workshops on foundational AI

concepts, ethical use, and real world problem solving, which tested core components of our planned sixth grade AI Literacy course. Family surveys and feedback showed strong parent interest in schools teaching responsible technology use and using AI to support personalized learning, and their input helped refine our curriculum and strengthen transparent family communication. The camp attracted a diverse group of Nashville families and built trust and excitement around The Gate School's mission.

Key Insight from AI Literacy Camp	Student curiosity about AI increases when learning focuses on understanding, experimentation, and responsible use.
Implications for School Design at The Gate School	

Participants: 14 students (Grades 3–4)

- Students reported high interest in learning how AI works and how to use it responsibly.
- Families indicated strong alignment between the camp's focus on inquiry, discussion, and ethical AI use and their expectations for future schooling.
- Parents noted increased student curiosity and confidence discussing AI concepts following the camp.

Family Voice

- "My child came home explaining not just what AI can do, but how it learns and why it can be wrong."
- "I appreciated that the camp focused on understanding and responsible use rather than just letting kids use AI tools."

Impact: The AI Camp demonstrated strong student demand for structured AI learning and validated the feasibility of inquiry-based, discussion-centered AI instruction. The experience informed The Gate School's decision to include a required AI literacy and responsibility sequence as part of the core middle school program. It was targeted to grades 3rd-4th grade since these students will be the first two classes of The Gate School in 2027 & 2028.

Key Insight from Acting Workshop	Students grow as communicators when they have structured opportunities to practice voice, presence, listening, and expression beyond the traditional classroom.
Implications for School Design at The Gate School	

Participants: 10 students (Grades 4-6)

- Students practiced voice, presence, listening, collaboration, and expression through a structured acting workshop.
- Families saw students engage in an enrichment activity that built confidence and communication skills beyond the traditional classroom.
- The workshop reinforced that extracurricular programming can directly support The Gate School's mission of developing student independence and effective communication.
- Families responded positively to programming that gave students opportunities to speak, perform, collaborate, and take creative risks.

Family Voice
"My child had a chance to use their voice and build confidence in a setting that felt fun and supportive."

"I liked that the activity was creative, but still helped students practice communication and confidence."

Impact: The Acting Workshop demonstrated that families value enrichment opportunities that develop the same communication skills The Gate School will foster through Harkness discussions, Seminar, public presentations, and the 8th-grade Capstone. The experience informed The Gate School's decision to make after-school and enrichment programming an intentional extension of the school's mission, not an unrelated add-on.

Key Insight from Bellevue Community Engagement:	Students grow as communicators when they have structured opportunities to practice voice, presence, listening, and expression beyond the traditional classroom.
Implications for School Design at The Gate School	

Participants: 35 Families from McCrory Flats and 8200 McCrory

- Families who are new residents of Bellevue expressed interest in learning more about high-quality public middle school options in the area.
- Families asked questions about academic rigor, school culture, transportation, after-school programming, and preparation for high school.
- The conversations showed that new Bellevue families are thinking ahead about middle school access as they settle into the community.
- Families indicated that they want a school that is academically strong, relational, safe, and connected to the needs of the neighborhood.

Family Voice
"We are new to Bellevue and want to understand what strong middle school options will be available for our child."

"It matters to us that a school feels connected to this community, not just located near it."

Impact: The McCrory Flats and 8200 McCrory events showed that new residents in Bellevue are actively considering future middle school options and want a high-quality public school that is rigorous, supportive, and accessible. The feedback reinforced The Gate School's focus on Bellevue/West Nashville and informed the school's commitment to direct, neighborhood-based family engagement. This fits the broader family and community engagement strategy already described in your application.

Summary

What We Learned	How Our Model Responds
Academics are the number one priority and concern for parents	Designed a rigorous academic program that includes accelerated academic pathways, personalized learning supported by AI, and a diverse set of elective courses such as Seminar, Computer Science, and Foreign Language.
Parents are worried about their students preparation for high school	Developed an academic model that includes high school level coursework (such as Algebra I) and integrates the Harkness Method to strengthen students' communication, collaboration, and critical-thinking skills essential for future success.
Parents are unsure about AI and what it means for their students and want a school that partners with them	Introduced a required AI Literacy course for all sixth graders and created parent engagement opportunities to foster shared understanding of ethical, responsible, and purposeful technology use. The school also established clear AI Ethics Commitments to guide both teaching and implementation and integrated ongoing instruction on AI use and digital citizenship, ensuring students develop confidence and discernment as technology users and creators.
Parents are deeply concerned about teacher quality.	Designed a strategic staffing model ("Teaching Firm") ensuring every student learns from highly effective teachers, with structures for professional growth, shared leadership, and continuous improvement.
Teachers want collaboration, growth, and long-term sustainability.	The Teaching Firm replaces isolated classrooms with shared practice. Teachers work in teams with protected collaboration time, embedded coaching, and advancement pathways that increase responsibility and compensation without leaving the classroom.
Teachers report burnout when systems are unclear or support is inconsistent.	Clear instructional routines, predictable culture systems, and role clarity reduce ambiguity. Leaders remain classroom-connected, ensuring decisions are grounded in daily practice and teacher support is proactive rather than reactive.
Students want voice, belonging, and meaningful relationships with adults.	Discussion-based instruction, Seminar, and student leadership opportunities ensure students are known, heard, and actively engaged in their learning community.
Students want supportive accountability rather than punitive discipline.	The Gate School integrates restorative practices, reflection, and skill-building into its culture model. Behavior systems are aligned with instruction and student development, reinforcing responsibility while preserving dignity.

Question 12: Provide, as **Attachment 1**, evidence of community engagement and support for the school. Complete **Table 3**, adding rows as needed, to identify and describe each item submitted as part of the attachment. Sponsors have discretion over what types of community engagement activities they undertake and the supporting documents they submit; however, each piece of evidence should demonstrate authentic engagement with and investment in the community. For example, evidence could include letters of support from confirmed or potential partner organizations or photos and sign-in sheets from community meetings.

The following materials are included as **Attachment 1** and provide evidence of The Gate School's authentic and ongoing engagement with families, community members, and local partners. Each item demonstrates how TGS has connected with the community, gathered input, and built meaningful support for the proposed school.

Table 3. Evidence of Community Engagement and Support

Briefly describe each piece of evidence included as part of **Attachment 1**.	Explain how and why the submitted item is evidence of the sponsor's engagement with the community and the community's support for the school.
Attachments 1.1 Interest and Support Survey	The Gate School Interest and Support Survey provides quantitative and qualitative family input collected over multiple months, demonstrating broad community engagement with **303 signatures and 204 families responding that they would be interested in sending their child to The Gate School if it were authorized.**
Attachments 1.2 Memorandum of Understanding (MOUs)	**Attachment 1.2 A: The Ensworth School:** This details our professional learning partnership with Ensworth School to support discussion-based instruction using the Harkness Method through classroom observations, institute participation, and collaboration informing instructional design and teacher development in a public middle school context.
	Attachment 1.2 B: Rafiq R. Kalam Id-Din II, Esq. This details our professional learning support with the Founding Partner at Ember Charter Schools, the first charter school with the Teaching Firm model.
	Attachment 1.2 C: Shelby Goodfriend, Nashville Incubator Facilities This MOU details the facilities-focused strategic, technical, and financial support that the Nashville Incubator will provide to Burrus Cox and The Gate School through his fellowship period into early operations.
	Attachment 1.2 D: Vertex Education (formerly EdTec): This documents engagement with a charter school back-office provider that supported budget development and financial planning for The Gate School's application, reflecting early operational readiness and external validation.
	Attachment 1.2 E: Washington Latin Public Charter School This MOU documents a formal learning partnership with Washington Latin Public Charter School, a nationally recognized charter school whose discussion-based model and everyone-teaches staffing structure serve as a

	direct proof point for The Gate School's core design. The partnership provides site visit access, instructional resources, and advisory support from a high-performing school with a closely aligned mission.
Attachments 1.3 **Local Philanthropic Support**	**Attachment 1.3 A: Summary of Contributions & Events** This summary documents local philanthropic support for The Gate School, including $154,880 of contributions from Nashville-based donors. The evidence demonstrates meaningful community investment in the school's mission and proof of the founding team's capacity to fundraise.
	Attachment 1.3 B: Contributions to Date Documentation of philanthropic contributions supporting The Gate School's planning and launch efforts, demonstrating early local investment in the school's mission and the founding team's fundraising capacity.
Attachments 1.4 Stakeholder Focus Groups	**Attachment 1.4 A: Student Focus Group Summary:** Summarizes direct student input on middle school challenges and desired experiences, demonstrating student voice in the early stages of school design.
	Attachment 1.4 B: Teacher Focus Group Summary: Captures educator perspectives on instructional model design, staffing structures, and teachers support, demonstrating direct teacher voice into the design of this strategic staffing model.
Attachment 1.5 **Experiential Camps and Classes**	**Attachment 1.5 A: AI Explorers Camp** Illustrates meaningful, reciprocal engagement byTGS providing a free AI literacy camp for 14 upper elementary students, offering both direct educational support and opportunities for families to experience the school's academic vision in practice.
	Attachment 1.5 B: Tutoring at Haynes Garden Free small group tutoring provided on-site at the Haynes Garden apartment complex, in partnership with Wonderfully Made Ministry . This program demonstrates TGS's commitment to meeting families where they live, building authentic relationships with students the school is designed to serve, and piloting instructional practices ahead of enrollment.
	Attachment 1.5 C: Acting Workshop in partnership with Nashville Children's Theatre We hosted a free acting workshop for third and fourth graders hosted in partnership with Nashville Children's Theatre. This program reflects TGS's commitment to a well-rounded middle school experience that develops the whole child, including the communication skills, confidence, and creative expression central to both the school's instructional model and long-term student success.
	Attachment 1.5 D: Inquiry-Based Summer Camp TGS is offering a free full-week summer camp, *"How Do We Know: A Thinking and Discovery Camp,"* June 15 through 19, 2026 for rising 4th and 5th graders hosted at Encompass Community School in West Nashville. The camp engages students in inquiry, discussion, and evidence-based

	reasoning, directly piloting core elements of The Gate School's instructional model with prospective students and families.
Attachments 1.6 Summary of Prospective Talent Interest	The Gate School has received unsolicited resumes and interest from 16 experienced educators seeking to join the founding team, signaling strong professional demand for a model that elevates the teaching profession through shared leadership and strategic staffing.
Attachments 1.7 Community Events	Attachment 1.7 A: Bellevue Community Center: Targeted outreach inviting 3rd and 4th grade families to a listening session at the Bellevue Community Center, with 10 families participating in structured two-way conversation and feedback on the proposed school model, informing priorities for middle school programming and culture.
	Attachment 1.7 B: McCrory Flats: A community-based listening session at McCory Flats in Bellevue, with 24 attendees and 12 signed letters of support, demonstrating neighborhood-specific interest in TGS.
	Attachment 1.7 C: PROPEL School Choice Fair: Documents in-person outreach and connection with families at the PROPEL School choice fair, including 14 completed paper surveys that provided insight on Nashville families top priorities for Middle School.
	Attachment 1.7 D: The Gate School at Tailgate: Captures feedback from families during the elementary-to-middle school transition, informing demand and program design. The event was hosted by a West Nashville parent of elementary-aged students, demonstrating parent-led interest and community ownership.
	Attachment 1.7 E: Holidays in the VUE Sponsorship: Demonstrates visible participation and investment in a local community event, reflecting ongoing community presence.
	Attachment 1.7 F: McCrory Community Dinner A TGS-hosted community dinner and listening session at the 8200 McCrory apartment complex, with 22 attendees and 14 signatures of support. The event provided a critical opportunity to connect with families in a trusted community setting.
	Attachment 1.7 G: Bellevue Community Picnic Community outreach through participation at the Bellevue Community Picnic, where TGS hosted an informational table and connected directly with local families about the proposed school model and middle school needs in the community.
	Attachment 1.7 H: Summer Kickoff Event for Prospective Families We are hosting a community-building summer kickoff event for families who have expressed interest in The Gate School, designed to strengthen relationships with prospective families while providing summer resources, activities, and opportunities for build family to family connections.
	Attachment 1.7 I: Schrader Lane Youth and Family Task Force Event: The Gate School's participation as a community partner at the Schrader Lane

	Youth and Family Summit. TGS's information table provided opportunities to build relationships with families, share the proposed school model, and connect with local organizations supporting youth and families.
Attachment 1.8 Letters of Support	**50** written statements from a diverse set of community members and partners expressing support for the mission, model, and need for TGS. ● **Attachment 1.8 A:** Community Organizations ● **Attachment 1.8 B:** Schools and Universities ● **Attachment 1.8 C:** Students ● **Attachment 1.8 D:** Families ● **Attachment 1.8 E:** Co-Workers ● **Attachment 1.8 F:** Facility Partners

Question 13: Describe how the school will continue to engage parents and community members once it is open.

At the Gate School, our approach to family and community partnership is designed to give every student the consistent network of adults they need to grow in independence and confidence as they prepare for high school and beyond. Research shows that family involvement significantly dips in the middle school years[37] despite strong evidence that students still need and benefit from strong family-school partnerships. Middle School family involvement is linked to higher grades, attendance, and social development[38]. We believe adolescents thrive when families are not simply informed but treated as authentic partners in their child's middle school experience. To facilitate family partnerships we focus on three core, connected practices: regular communication, shared community experiences, and meaningful collaboration.

Communication

- **The Gate School Family Handbook & Website** will provide a clear and transparent reference guide families can return to for key questions about our commitments, policies, and practices. All core materials will be translated into multiple languages to reflect the needs of our diverse student body.
- **Weekly Family Path Report.** Each week, families receive printed and digital "Path Reports" showing progress on academic goals and our "Commitment of the Month". Every report includes a brief definition and reflection prompt to spark short conversations at home, helping families reinforce core habits that prepare students for success beyond middle school.
- **Positive Notes and Texts Homes:** In middle school, the personalized note home often fades, but we believe families deserve to hear everyday celebrations of how their child contributes to the school community. House team leaders will send at least one positive, personalized message to each family per quarter. Research shows that brief, regular positive communication increases student motivation, attendance, and family–school trust.[1]
- **Transparent Progress Data:** Families can access real-time student data through Colleague AI and will receive automatic mid-quarter and end-of-quarter progress reports.

[37] Backgrounder: Family & Community Engagement
[38] Evidence that Family Involvement Promotes School Success for Every Child of Every Age.

- **Student-led Conferences:** By 8th grade, students will lead their own family conferences, sharing evidence of learning and growth. Research shows that strong student-led conferences increase student ownership and collaboration with families and teachers[39]; aligning to our mission of student independence.
- **Town Hall:** Twice per year, the partners at The Gate School will host a town hall meeting for families and community members to communicate progress toward annual mission-driven goals, leveraging key data from the board's performance dashboard.
- **Social Media** is an important and ongoing communication tool The Gate School will leverage at least weekly to ensure community celebrations and important announcements are shared with families and supporters via tools many access daily.

Community Building & Shared Experiences

- **Family Orientation:** We will host multiple orientation opportunities for new families each year in order to build relationships and introduce the vision, commitments, and core expectations of the Gate School.
- **Student Exhibitions and Community Meetings:** Families will be invited to observe and/or volunteer at key learning and culture rituals at The Gate School, celebrating student work and creating opportunities for connection. Community Meetings will be held monthly and our Student Exhibitions will be quarterly.
- **Monthly Parent Classroom visits:** Families will have monthly opportunities to visit classrooms through guided, pre-scheduled observation blocks in order to observe core learning practices like the Harkness method in action.
- **Quarterly Community Events:** In collaboration with the Family Advisory Council (see below) we will plan one community wide event each quarter (e.g. potluck, game night, etc).
- **Sports & Extracurricular Activities:** Families and community partners gather around shared interests such as sports and arts performances throughout the year.
- **Small pops of joy:** To build connection and reinforce a culture of belonging we will execute small joy rituals for families such a pop up coffee in the car line, treats in the front office on open visit days, etc.

Collaboration

- Our **Family Advisory Council** will consist of 8-10 families, Partners, and our Director of Operations. They will gather quarterly to provide input on strategic decisions and co-plan community events, ensuring families serve as partners, not just participants.
- **High School Selection Partnership:** Aligned with our mission to prepare students for the high school of their choice, we will collaborate closely with families through one-on-one planning meetings, a high school choice kickoff event, and invitations for families to join high school visits with their children.
- **Intentional AI Integration:** Through Colleague AI, families will be able to ask quick questions (e.g., 'When is dismissal?'), access homework or tutoring support, and view transparent academic data in one place, simplifying communication and reducing barriers. These tools extend, not replace, the human relationships at the heart of our family partnerships.

[39] The Effects of Student Led Conferences on the Improvement of 21st Century Career & Life Skills

- **Community partnerships:** Our collaborative vision extends beyond families to include trusted Nashville partners who share our commitment to supporting students and families. These partnerships provide families with access to mentoring, after-school care, and essential resources that reinforce our students' stability and engagement.
  - **St. Luke's Community House**
    - Collaborate with St. Luke's Community House, a long-standing Nashville organization serving children, families, and seniors through its food pantry, family empowerment, and youth programs.
    - Partner to connect Gate School families with St. Luke's wraparound supports, including access to food, housing stability resources, and family goal-setting services that promote long-term self-sufficiency.
  - **Dream Streets Nashville**
    - Collaborate on student-led service projects such as supporting Dream Streets' Summer Days program or assisting with their mobile food distribution, giving students opportunities to develop leadership, empathy, and community engagement skills.
    - Connect Gate School families to Dream Streets' food distribution and family resource programs to strengthen wraparound support, remove barriers to learning, and reinforce The Gate School's whole-child approach.
  - **Youth Encouragement Services (YES)**
    - Partner with YES, a nonprofit that provides after-school programs, mentoring, and summer enrichment to youth across Nashville.
    - Collaborate to connect Gate School students and families with YES's academic tutoring, youth leadership programs, and family support services.
    - Co-host community events and student service projects that reinforce shared values of care, growth, and opportunity for every child.
  - **Preston Taylor Ministries**
    - Partner with Preston Taylor Ministries, an organization dedicated to empowering youth through mentoring, academic support, and character development.
    - Work together on family outreach and service opportunities that align with The Gate School's mission to develop independent, compassionate, and community-minded learners.
  - **YMCA Fun Company and Boys and Girls Club** to provide before and after care
  - Partnership with **PROPEL** to understand the needs and top educational priorities for Nashville families

Implementation and Staff Development

Roles & Responsibilities

The Gate School's family and community engagement plan is designed to be operationally and financially sustainable because core responsibilities are intentionally assigned to specific roles within the school's staffing model, rather than informally added to a staff member's responsibilities. As described in Question 41, community engagement roles are part of The Gate School's planned staffing structure, and the costs for these roles are included in the staffing and personnel budget described in Questions 56 and 57. This division of responsibility ensures that the plan is not dependent on one person, volunteers, or sets of activities that exceed staff

capacity. Schoolwide communication is owned by the Executive Partner, family culture is owned by the Culture Partner, systems and logistics are owned by the Operations Team, and student-specific communication is embedded throughout, including during advisory meetings.

Staff Role	Family and Community Engagement Responsibilities
Executive Partner / School Leader	Owns schoolwide family communication and public accountability, including twice-annual town halls, updates on progress toward annual goals, major community partnerships, and communication connected to the board performance dashboard.
Culture Partner	Owns family culture and community-building systems, including family orientation, quarterly community events, monthly community meetings, student exhibitions, and collaboration with the Family Advisory Council.
Director of Operations / Operations Team	Owns the operational systems that make engagement consistent, including family contact systems, website and handbook updates, communication platforms, translation coordination, event logistics, and support for weekly Path Reports.
House Team Leaders	Own regular student-specific family communication, including positive notes or texts home, student-led conference preparation, follow-up on advisory goals, and communication connected to each student's Path Report.
Classroom Teachers and Associates	Own academic communication related to courses and student support, including accurate grades, progress updates, early communication about academic concerns, and preparation for academic conferences.
Family Advisory Council	Provides structured family input and feedback on school priorities, community events, and family experience. The council advises and co-plans, while staff retain responsibility for execution.

Strong family and community partnership is a shared responsibility across all roles and we've created a clear delegation of core tasks to ensure we keep our promises to families and partners.

Staff Professional Development will include foundational sessions on the 'why' for family partnership in the middle school years, best practices, and skill development to strengthen communication with families as partners in cultivating student independence and achievement. See more detail about our professional development plan in Question 43.

School Culture and Discipline

Question 14: Describe the culture or ethos of the proposed school and how it will promote a positive academic environment and reinforce the school's mission and goals.

At The Gate School, our ambitious goals for academic excellence and student independence depend on a culture where students, staff, and families feel safe, valued, and responsible for one another's growth. Our culture model is rooted in the Gate School Commitments and strengthened by practices drawn from research and high-performing middle schools.

Vision: The Gate School Commitments

Unlike most schools, our culture vision is designed for the whole community, students, staff, and families because the same durable skills that help students thrive should guide how adults collaborate and lead. The Gate School Commitments translate our core values into daily habits and a shared language for teaching, modeling, and reinforcing how we learn, grow, and lead together.

1. We affirm, celebrate, and support each member of our community.

We begin with this foundational commitment because we know it creates the conditions for all others to thrive. To access accelerated learning opportunities, students must first feel safe, cared for, and seen. For families to trust our school, we must demonstrate genuine care for both them and their child as whole people. To fulfill our mission of recruiting and retaining exceptional teachers, we must foster a culture where every adult feels valued for their unique strengths and supported during times of challenge.

2. We commit to learning with and from one another, knowing we grow stronger together.

Collaboration is not an occasional practice here, it is a defining feature of how we learn and lead. Our model intentionally breaks down the isolation common in education. Every instructional leader teaches, teachers co-plan, and students participate in discussion-based, Harkness-style classrooms where learning is built through listening, questioning, and collective insight.

3. We commit to embracing challenges with curiosity and courage.

At The Gate School, challenge is a badge of honor, a visible sign of curiosity, courage, and persistence. In classrooms, students are taught that mistakes are a natural and necessary part of growth. Teachers model this same mindset, experimenting with new strategies, reflecting openly, and refining their craft. At the Gate School, we celebrate every instance of challenge because each one represents having the courage to grow.

4. We commit to choosing the harder right over the easier wrong.

Reaching ambitious goals together requires every member of our community to act with integrity, even when it is difficult. At the Gate School, we support and challenge one another to live out this commitment by keeping our promises, having direct and honest conversations, nurturing relationships, and taking responsibility for our actions using restorative practices.

Vision: Schoolwide Expectations

In addition to the Gate School Commitments, we operate with a simple set of student-facing expectations that create consistency across all learning and community spaces. School-wide PBIS research finds that when schools define 3–5 simple, positively stated expectations, teach them

directly, and reinforce them, student behavior improves and office referrals/suspensions go down[40].

- *We will be safe*
- *We will work hard*
- *We will be kind and caring*

Core Strategies & Structures

Our foundational culture strategies and structures are both aligned to our commitments and best practices for creating safe and supportive environments for all. We are partnering with Valor Collegiate Academies to personalize their Culture framework and systems for The Gate School context. These systems were developed and refined within a Nashville public school context serving diverse adolescent learners with needs similar to those The Gate School anticipates serving. Valor is one of the highest performing public secondary schools in Tennessee[41] and has been nationally recognized for its work to share their culture model with schools around the country. The proposed Executive Partner at The Gate School, Burrus Cox, has direct experience implementing these systems as a former Valor staff member.

Four core structures we will customize for the Gate School community include:

Core Structure	Description
Commitment based culture	The Gate School Commitments are our shared culture anchor for students, staff, and families. They translate our values into actionable daily habits and pull the thread of our vision from paper to real life. **Example in action:** Each week, families receive printed and digital "Path Reports" showing progress on academic goals and our "Commitment of the Month". Every report includes a brief definition and reflection prompt to spark short conversations at home, helping families reinforce core habits that prepare students for success beyond middle school. See question 15 for how commitments are taught and reinforced across students, staff, and families throughout the year.
Compass Points System *(referred to as "Path System" at the Gate School)*	The Path System is our schoolwide positive-culture and accountability system. Students earn points for living out commitments and meeting expectations, and receive clear, consistent feedback when they go "off path". This approach is aligned to the evidence base on School-Wide PBIS: when schools explicitly teach expectations and reinforce them through consistent, positive recognition, they see reductions in office discipline referrals and suspensions and improvements in overall school climate[42]. **Example in action:**

[40] https://iris.peabody.vanderbilt.edu/module/beh1/cresource/q1/p02/?utm
[41] Our Results - Valor Collegiate Academies
[42] Official Journal of the American Academy of Pediatrics

	During class, a student helps a peer revise an argument respectfully. The teacher awards +2 Care Path Points, names the behavior aloud, and the point shows up on the student's weekly Path Report that families review at home. See question 17 for sample point values, behavior matrix, response levels, and restorative reset procedures.
Compass Support Cycle *(referred to as "On Path Support" Cycle at the Gate School)*	The On-Path Support Cycle is the core set of adult classroom management skills we use to keep students learning and connected. Staff consistently: (1) give clear directions, (2) notice and build relationships, (3) affirm commitment-aligned behavior, and (4) support students to course-correct when they struggle. This approach reflects the evidence base[43] on restorative practices: schools that use relationship-centered, instructional responses to misbehavior (rather than exclusion) see improved school climate and reductions in suspension rates when implemented with fidelity. **Example in action:** After a student loses two path points for calling out, staff members intentionally notice and seek to connect with that student by looking for a bounce back opportunity to affirm their choice to get back "on path". See question 17 for more detail.
Faculty Compass Circles	Gate School Staff will engage in twice monthly Compass Circles as a way to build connection, trust, and embody our commitments, knowing the health of our adult culture feeds into the health of our student culture. Compass Circles have been practiced at over 100 schools nationwide, demonstrating schools with this practice have stronger relational trust and psychological safety and reduced teacher burnout. **Example in action:** During Staff Circle a faculty member has the opportunity to share a piece of pre-planned "work" that introduces their personal values and strengths and the rest of the team as the opportunity to listen, connect, and affirm. Please see question 15 for additional detail.

Culture Ownership

Building The Gate School's culture is a shared responsibility of every adult, while culture and discipline outcomes are intentionally owned and led by the Culture Partner. This senior instructional leader serves on the Partner Council, stewards the school's culture vision, monitors progress toward culture goals, and applies a culture lens to key school decisions. Consistent with the Teaching Firm model, the Culture Partner teaches one instructional block daily alongside other instructional Partners. Beyond the classroom, the Culture Partner dedicates protected leadership time to culture walkthroughs, data monitoring, staff calibration, and restorative behavior support that keeps students connected to classrooms, as discussed in Question 17.

[43] RAND: Can Restorative Practices Improve School Climate and Curb Suspensions?

Question 15: Explain how this culture will be established for students, teachers, administrators, and parents from the first day of school, how it will be reinforced throughout the school year, and the plan for integrating students who enroll midyear.

Building a strong culture begins from the very first interactions and continues through 8th grade promotion. Our approach is collectively owned by all members of the school community, students, staff, and families and reflects our mission to cultivate student independence, effective communication, and academic excellence. From day one, shared commitments and expectations are explicitly introduced, reinforced throughout the year, and proactively shared with students and families who enroll mid-year.

Culture Onboarding

Students	The Gate School begins each year with an intentional Launch Period, during which the daily schedule is temporarily adapted to prioritize culture-building, community formation, and explicit instruction of shared commitments. During this time, students engage in structured launch lessons delivered through community blocks and core classes that introduce the school's commitments, explain their purpose, and teach the routines and behaviors required for success in a rigorous, discussion-based middle school environment. The Launch Period spans the first 10 instructional days. Each Launch lesson is built around a specific Gate School Commitment and includes: (a) explicit instruction on what the commitment looks like, sounds like, and feels like in practice; (b) modeled examples and non-examples; (c) student rehearsal across at least three different settings (Harkness discussions, transitions, shared spaces, lunch); and (d) reflection and feedback. The Launch Period sequence concludes with a Community Commitment Ceremony, during which students sign their Commitment Agreement in front of peers and families and receive their House Team assignment. Following the launch period, Seminar, which meets twice per week for all students, provides targeted reinforcement during the first month of school. Seminar lessons deepen understanding of the school's commitments through social-emotional learning, ethical reasoning related to technology and AI use, and structured Harkness-style discussions. As the year progresses, Seminar transitions into its full scope of coursework while continuing to reinforce culture through reflection, dialogue, and shared inquiry. In addition to Seminar, all core academic classes reinforce the school's commitments through consistent routines, shared language, and aligned expectations for discourse, collaboration, and academic effort.
Staff	**Commitment-Aligned Hiring:** Prospective staff are introduced to the Gate School Commitments during recruitment, and interview questions assess alignment with this culture vision. **Commitments Intro:** Foundational training includes an overview of each commitment, the rationale, and collaborative co-construction of what success looks like in action. **Summer Professional Development (Core Culture Systems).** We are partnering with Valor Collegiate Academies to ensure high quality training for all staff into the vision,

	rationale, and best practices in executing our core systems and routines schoolwide. See question 43 for more detail. **Late Hire Onboarding (if needed):** Mid-year staff hires receive an accelerated onboarding that includes training on the commitments, core routines, and culture systems, along with shadowing experienced staff to ensure alignment from day one. Our **Staff Handbook** will include a complete list of the commitments with the ask that signing their handbook is an agreement to work collectively towards living these out and take ownership and accountability when we struggle to meet them.
Families	**Family Orientation:** We will host multiple orientation opportunities for new families each year in order to build relationships and introduce the vision, commitments, and core expectations of the Gate School. **The Gate School Family Handbook** will overview the Gate School Commitments, the core commitments, and essential school policies for families to sign annually. Core family materials will always be translated into multiple languages, aligned to the needs of our diverse study body.
Mid year enroll	**Students:** Entering a new Middle School after the year has started can be challenging for adolescents and at The Gate School we want to ease that process using research on the role of peers and mentors in successful transition[44]. To support students enrolling mid-year we will: ● Assign them a peer buddy from their grade who will play a leadership role in welcoming the student to school, sitting with them at lunch the first week, and helping to answer questions. ● Provide a virtual or in-person student orientation to review core schoolwide expectations, routines, and traditions during the first day on campus. ● Meet weekly with their House team leader during the first month for personalized check-ins and support. ● Meet with the Culture Partner, House Team leader, and their family for a 30-day check-in conference to assess the transition, surface any unmet needs, and confirm cultural integration. **Families:** Family partnership is essential to student success and as families enroll mid-year we will ensure they feel welcomed as a part of the Gate School community. We will do this by: ● Receive a welcome call from the Culture Partner within 48 hours of enrollment to begin the relationship before Day 1, introduce the Gate School commitments, and answer any initial questions. ● Sharing core materials from the Family Orientation during a one-on-one meeting within the first 2-3 days of the student attending The Gate School (e.g. overviews, presentation materials they missed). ● Ensuring families review and sign the family handbook.

[44] How to help students in their transition to middle school? Effectiveness of a school-based group mentoring program promoting students' engagement, self-regulation, and goal setting

	• Tasking the student's House Team leader with a personal outreach to new families to build a relationship and offer support in the transition. • Attend a 30-day check-in conference with the Culture Partner, their student's House Team leader, and student to reflect on the transition, share feedback, and reinforce the family–school partnership.

Ongoing Culture Reinforcement

Students
The Path System is a comprehensive approach to rewarding students individually for aligning to our core commitments and schoolwide expectations, while also providing feedback and age appropriate consequences when students are "off path". Students see their path report weekly and can access their own data transparently at any time through our AI platform. See more detail about this system in question 17. Upon enrollment at The Gate School, students are assigned to one of four house teams, ensuring balanced representation across grade levels. **House team competitions** provide structured opportunities for students to practice the school's commitments collaboratively and build a sense of belonging beyond their classrooms. Teams earn recognition through collective alignment to shared expectations, including academic effort, respectful discourse, collaboration, and contribution to the community. Competitions emphasize teamwork, perseverance, and positive peer influence rather than individual reward, reinforcing that culture is a shared responsibility. Through regular house activities and celebrations, students build relationships with peers and staff across grade levels while experiencing the commitments in action. **Community Meetings** bring the entire school together to celebrate growth, recognize students for living out the Gate School Commitments, and build connection through rituals such as Student of the Month recognition. The **Student Advisory Council** is a group of 6-8 student leaders, nominated by teachers and voted into office that meet quarterly with the Partner Council. They provide leadership and feedback on school culture, ensuring their voices shape and strengthen the student experience and overall school quality.
Staff
Time & space for connection: The Gate School will adopt the Compass Circle ritual for faculty to build and sustain a healthy adult culture. Twice per month on our early release day, staff will engage in this community practice that increases relational trust, physical safety and reduce teacher burnout[45]. **Celebration:** We will select a "Keeper of the Gate award" monthly to celebrate staff members who have exemplified the commitments in daily practice. **Walkthroughs & Feedback:** All instructional staff (including partners) receive weekly rubric aligned observations that include The Gate School classroom culture vision led by the Culture Partner.

[45] Valor Compass Survey analysis from University of Virginia and Transcend Education

Data Driven Continuous Improvement:

- Quarterly data day rituals include all instructional staff presenting student progress to goals and this includes both culture and academic data to ensure we are holistically monitoring progress.
- The Culture Partner brings a culture data report at least bi-weekly to the Partner Council meeting in order to collectively analyze progress toward culture goals, celebrate progress, and proactively problem solve areas that are off-track.

Families

Weekly Family Path Report: Families will receive a weekly summary of their student's path points with a focus on the Gate School commitment of the month. This will include a reminder of the commitment definition and guiding questions for discussion to reinforce this commitment at home.

Student Exhibitions and Community Meetings: At the Gate School we believe that Middle School families deserve the opportunity to see and experience our school culture in action and will maintain an open invitation to join core academic and culture rituals throughout the year including seeing their students work in student exhibitions and discussions as a part of our community meetings.

Monthly Parent Classroom visits: Core culture is lived not only in core traditions or culture rituals, but also in all learning spaces. We will invite families to experience both our academic model and core classroom culture in action through monthly classroom visit offerings where families have the opportunity to observe and experience core lessons and Harkness discussions.

Culture Roles & Responsibilities

The work of cultivating the culture we aspire to will take everyone to play a role and very clearly defined responsibilities for implementing each part of the system. The Culture Partner is the lead in driving toward the vision and goals for strong culture at The Gate School.

Role	Core Culture Responsibilities
Culture Partner	● Owner for The Gate School's core culture vision, revising annually based on data and feedback ● Monitor implementation of core systems through walkthroughs and feedback from stakeholders ● Analyze core culture data and shares transparently with partner team and staff to drive progress ● Lead professional development for associates on effective execution for all core culture routines (e.g. path points, support cycle) ● Owner for the mid-year onboarding protocol; reviews all 30-day Family Conference notes monthly to identify systemic transition needs and propose protocol refinements.
All Partners	● Infuse the commitments into hiring, onboarding, and professional development for all staff ● Review culture data at least bi-weekly at partner council meeting and support continuous improvement towards culture goals

All Staff	● Model, reflect, and grow in living out core commitments and overall culture vision ● Build relationships with students and families to ensure each child collectively feels seen, known, and affirmed at TGS ● Lead mid-year onboarding for assigned new students and families, including the Day 1 onboarding session, weekly check-ins, and the Day 30 Family Conference.
Director of Operations	● Own technology tools for recording path points and sharing with families ensuring reliable communication and access ● Planning and execution of events (e.g. monthly family visits) ● Respond to FAQs from families ● Own regular schoolwide family communication
Associates	● Facilitate schoolwide and grade level community meetings *(senior associates)* ● Teach and reinforce schoolwide commitments and expectations to ensure students thrive *(all associates)* ● Ensure student "path points" are up to date every Thursday before weekly path reports go home on Fridays *(all associates)* ● Review weekly path reports for students on their house team *(all associates)* ● Own family communication and positive notes home for students on their house team *(all associates)*

Question 16: Describe any goals related to student attendance and describe the structures the school will put in place, including collaboration with families and the community, to support student attendance and address chronic absenteeism.

At the Gate school, we know that students must be fully present and engaged in learning in order to meet our mission of preparing every student for the high school and career of their choice. As students enter middle school, consistent attendance becomes even more critical for success, as research shows that students who miss 14 or more days in middle grades are 18 percentage points less likely to graduate on time (Chicago Longitudinal Study[46]).

Attendance Goals

The Gate School's progressive truancy intervention protocol is built directly on Tennessee State Board of Education Rule 0520-01-02-.07 and T.C.A. § 49-6-3007. Every required meeting, attendance contract, individualized assessment, and referral step described in the state rule is incorporated below. Thresholds are based on **unexcused** absences as defined by MNPS attendance qualifications; a student may also enter Tier 2 or Tier 3 based on **total** absences (excused + unexcused) per the chronic-absenteeism triggers in the right-hand column.

Tier	Trigger (Unexcused)	Trigger (Total Absences)	State Rule Reference

[46] Chronic absence, eighth-grade achievement, and high school attainment in the Chicago Longitudinal Study - PubMed

Tier 1 — Universal/Proactive	0–4 unexcused	< 10% of enrolled days	Pre-truancy / preventive
Tier 2 — Targeted (Progressive Truancy Tier I)	5 unexcused	≥ 10% of enrolled days (chronic absenteeism threshold)	SBE Rule 0520-01-02-.07(2)(d)(2) — Conference + Attendance Contract
Tier 3 — Individualized (Progressive Truancy Tier II)	7 unexcused, OR Tier 2 plan unsuccessful	≥ 15% of enrolled days	SBE Rule 0520-01-02-.07(2)(d)(3) — Individualized Assessment & Case Management
Tier 4 — Court/External (Progressive Truancy Tier III)	10 unexcused, OR Tier 3 plan unsuccessful	≥ 20% of enrolled days	SBE Rule 0520-01-02-.07(2)(d)(4) — Referral to Juvenile Court & DCS as appropriate

Tier 1 Proactive Supports

The Gate School proactively addresses common causes of chronic absenteeism identified by Attendance Works[47] through engaging instruction, strong relationships, and a joyful, supportive school culture.

Common Cause	Aligned Proactive Supports
Lack of challenging, engaging instruction	● Accelerated coursework ● Inquiry- based learning using the Harkness Method ● Deep investment in recruiting & retaining top teaching talent
Lack of enrichment opportunities	● Daily electives (P.E. and Art) for a balanced experience ● After school clubs and sports
Unwelcoming school climate	● The Gate School Commitments define a clear, caring culture ● Joyful routines and traditions (e.g. weekly community meeting, learning exhibitions, incentives for path points) ● Clear expectations and a consistent support cycle
No meaningful relationship to adults or peers	● Each student has a House Team leader as their guide and advocate ● House teams cultivate connection and belonging ● All staff members teach, strengthening 1:1 relationship with students
Lack of academic and behavioral support	● Daily 45 minute intervention block ● Comprehensive MTSS system for academic, behavioral, and attendance data and interventions

[47] Identify the root causes of absence - Attendance Works

Attendance Structures & Supports

Tier 1: Universal support for all students

- **Transparent attendance goals**: In staff and family onboarding we will transparently share these goals and reinforce the importance of attendance on short and long term outcomes for adolescents.
- **Roles & Responsibilities:** In alignment with our strategic staffing model and deep value of collaboration we believe that strong attendance requires the support of all staff members, students, and families. The success of our attendance goals will be managed by our DOO, with support from the front officer coordinator and Operations Partner.
- **Strong attendance systems and routines:** All Instructional Staff are accountable for accurate daily attendance entry. The Director of Operations will oversee the aligned technology tools to ensure effective progress monitoring by associates and partners.
- **Family communication:** Families receive automatic text reminders when students are absent, along with a link to submit documentation. Absences must align with MNPS qualifications[48] to count as excused (e.g. illness, death in the family, recognized religious holiday). The front office coordinator will own follow-up messages to gather absence documentation and ensure core forms and messages are translated and accessible to the needs of our diverse student body.
- **House Team-Family Partnership:** As Middle School students transition to multiple teachers and class changes for the first time it is critical that House Team leaders help to ease that transition by creating trusting relationships and a sense of belonging. House Team leaders communicate overall progress weekly with Path Reports, send home positive messages for each child, and respond within 48 hours to all other family messages.
- **Celebration and Incentives:** Attendance is celebrated regularly at the individual, team, and schoolwide level through quarterly recognition, house team points, and community celebrations.
- **Data Monitoring & Early Identification:**
    - **Daily:** The Director of Operations ensures attendance data is complete and accurate from all instructional staff.
    - **Weekly:** Grade Level Teams review attendance trends and flag students approaching Tier 2 thresholds and follows up with families as needed.
    - **Monthly:** Attendance data is reviewed as a part of our MTSS process, triggering Tier 2 or Tier 3 support.
- **YMCA and Boys Club/Girls Club Partnership:** We know that for many families school start and end times do not meet the reality of transportation challenges or work schedules. We are committed to offering affordable before and after care options to support on time and consistent attendance.

Data routines:

- *Daily:* DOO confirms attendance is complete and accurate.
- *Weekly:* Grade-level teams flag students approaching Tier 2 thresholds (3–4 unexcused or trending toward 10% absence).

[48] Attendance - Metropolitan Nashville Public Schools

- *Monthly:* Attendance reviewed in MTSS; tier movements documented.
- **Exit/maintenance criterion:** Students remain in Tier 1 by sustaining < 5 unexcused absences and < 10% total absence.

Tier 2: Targeted Support for emerging concerns

Trigger: 5 unexcused absences OR ≥ 10% chronic-absence rate over any rolling 30 instructional days.

Actions:

1. **Attendance Conference within 5 instructional days of trigger.** Required attendees: student, parent/guardian, House Team Leader, and a member of the Operations Team (DOO or Operations Partner). Interpretation services provided when needed.
2. **Written Attendance Contract** signed by the student, parent/guardian, and school representative. The contract specifies:
    - The expectation that the student will have no unexcused absences during the contract period;
    - A defined contract period (typically 20 instructional days, not to exceed 45);
    - Specific, identified actions the school, family, and student will take to address barriers (transportation, sleep/morning routine, mental-health, illness management, etc.);
    - A schedule for progress check-ins and the consequence (movement to Tier 3) if the contract is not met.
3. **Wrap-around supports activated based on the conference:**
    - Daily check-in/check-out with House Team Leader or Partner;
    - Morning-arrival routine plan co-designed with caregiver;
    - Short-cycle Path Point incentives tied to attendance;
    - Referral to before/after-care to resolve schedule gaps;
    - Health/mental-health screening referral when a pattern suggests medical or SEL concerns.
4. **Progress monitoring:** Bi-weekly review by the MTSS team; status communicated to family every 10 instructional days.
5. **Exit criterion:** No unexcused absences and < 10% total absence sustained over 20 consecutive instructional days returns the student to Tier 1.

Tier 3: Intensive Support and Community Collaboration

Trigger: 7 unexcused absences OR an unsuccessful Tier 2 attendance contract OR ≥ 15% absence rate.

Actions:

- **Individualized Assessment of root causes** conducted by the MTSS team within 5 instructional days of trigger. The assessment uses an evidence-based protocol (e.g., the

Attendance Works root-cause interview) and considers academic, behavioral, social-emotional, family, health, transportation, and housing factors.

- **Tier 3 Family Meeting** within 10 instructional days. Required attendees: parent/guardian, student, House Team Leader, DOO, Culture Partner, and (when applicable) the school counselor, special education case manager, EL teacher, or external community partner. The meeting documents the assessment findings, finalizes a written **Individualized Attendance Support Plan**, and identifies a single point-of-contact case manager.
- **Coordinated case management** with at least one external community partner, drawn from:
    - **Dream Streets Nashville** — home-based check-ins, food/transportation barriers, family stability supports;
    - **Youth Encouragement Services (YES)** — daily after-school programming, mentor assignment, weekly family check-ins;
    - **St. Luke's Community House** — food pantry, family empowerment, housing-stability resources;
    - **Preston Taylor Ministries** — mentoring and academic support;
    - Local pediatric and mental-health providers when health is a driver.
- **Progress monitoring:** Weekly review by the MTSS team; status communicated to family weekly. The Individualized Plan has a defined review date (typically 30 instructional days).
- **Exit criterion:** No unexcused absences and < 10% total absence sustained over 30 consecutive instructional days returns the student to Tier 2 monitoring; an additional 30 days at that level returns the student to Tier 1.

Tier 4 — Court/External Engagement (Progressive Truancy Tier III — SBE Rule 0520-01-02-.07; T.C.A. § 49-6-3007)

Trigger: 10 unexcused absences OR Tier 3 plan unsuccessful OR ≥ 20% absence rate.

Actions:

1. **Written notice to parent/guardian** issued by the DOO documenting the school's intervention history and the legal obligations under TN compulsory attendance law.
2. **Final Tier 4 Meeting** with parent/guardian, student, DOO, Culture Partner, and (when invited) MNPS Student Support Services and a juvenile court liaison.
3. **Referral to Juvenile Court** under T.C.A. § 49-6-3007 only after documented Tier 1, 2, and 3 interventions; concurrent referral to the Department of Children's Services when neglect or abuse is suspected, per state mandated-reporting law.
4. The school continues to provide Tier 3 supports during and after court engagement, and assigns the case to the Partner Council for monthly review until the student has sustained Tier 1 attendance for a full grading period.

Roles & Responsibilities

Role	Attendance Responsibilities

Director of Operations (DOO)	Owns attendance data accuracy, daily audits, system/SIS oversight, Tier 4 written notices, and MTSS attendance reporting to Partner Council.
Front Office Coordinator	Same-day family outreach, documentation collection, translation coordination.
House Team Leaders	Tier 1 family relationship-building, weekly Path Reports, lead Tier 2 conferences and contract execution.
Culture Partner	Co-leads Tier 3 family meetings; ensures cultural/SEL lens on root-cause assessments.
Operations Partner	Joins Tier 2/3 meetings as needed; manages community-partner referrals.
All Instructional Staff	Daily accurate attendance entry by 9:00 a.m.; participate in Tier 2/3 meetings for students they serve when relevant.
MTSS Team	Monthly tier movements, weekly Tier 3 progress reviews, bi-weekly Tier 2 reviews.
Partner Council	Reviews schoolwide attendance data bi-weekly; monitors Tier 4 cases monthly.

Compliance & Continuous Improvement

The Gate School will adopt MNPS's official Attendance Procedures and align all forms, contracts, and notices to **TN SBE Rule 0520-01-02-.07** and **T.C.A. §§ 49-6-3001 through 49-6-3009**. The school's attendance protocol, contract templates, and meeting documentation forms will be reviewed annually by the Partner Council and updated to reflect any changes to state rule, MNPS procedures, or evidence-based practice. Outcomes against the seven attendance goals above will be reported in the school's Annual Report and used to drive continuous-improvement decisions in MTSS, family engagement, and community-partner coordination.

Question 17: Describe the proposed school's discipline approach. Discuss how this approach aligns with the school's mission and state law and will meet the needs of the anticipated student population.

The Gate School's approach to discipline is grounded in the belief that strong relationships, clear expectations, and restorative practices create the foundation for student growth. We have adapted select core culture structures from the Valor Collegiate middle school framework because it has a strong local track record of meeting the needs of early adolescents within a diverse student body in Nashville. This evidence-based foundation ensures our approach is both locally proven and tailored to our mission and student population.

These practices directly advance The Gate School's mission by teaching students to take ownership of their actions, reflect on their impact, and repair harm—key skills for developing independence and effective communication. Restorative responses keep students connected to classrooms and learning, protecting instructional time and supporting academic excellence rather than removing students from instruction. By holding students accountable through

reflection, dialogue, and re-engagement, our discipline model prepares students to navigate increasingly complex academic and social expectations in high school and beyond.

Core Beliefs

The systems and structures of this discipline approach are grounded in a few core beliefs that will be explicitly taught to staff during Summer Professional Development and reinforced through feedback cycles and ongoing development.

- **Trusting relationships are the foundation of a strong, trauma-informed culture:**
  We invest deeply in knowing our students as individuals and creating trust, recognizing that many early adolescents enter middle school still building self-regulation and may have experienced adversity. Because belonging and supportive adult relationships are strongly linked[49] to student engagement and persistence in secondary settings, we lead with noticing, affirmation, and repair.
- **Clear and consistent expectations create safety:**
  As middle school students begin rotating classes and working with multiple adults each day, we do not assume they already know shared norms; we explicitly teach, model, and rehearse expectations across settings so students experience predictability everywhere. This aligns with PBIS research showing that teaching schoolwide expectations and reinforcing them consistently reduces discipline incidents and improves school climate[50].
- **Keep students learning and connected:**
  We know that excluding students from classrooms causes both social disconnection and lost learning time, which is especially harmful for students who may already be behind academically or face instability outside of school. Our system is designed so that most behavioral moments are addressed instructionally in class, and when a reset is needed it is brief, restorative, and aimed at rapid re-engagement.
- **A restorative lens:**
  Middle School students are still growing and learning and we expect them to make mistakes and test the limits of school wide expectations. We recognize that behavior does not change through punishment; sustainable behavior change occurs through relationships, skill-building, reflection, consistency, and opportunities to repair harm.

Schoolwide Expectations

In addition to the Gate School Commitments, we operate with a simple set of student-facing expectations that create consistent expectations across all learning and community spaces. School-Wide PBIS research finds that when schools define 3–5 simple, positively stated expectations, teach them directly, and reinforce them, student behavior improves and office referrals/suspensions go down[51].

- *We will be safe*
- *We will work hard*

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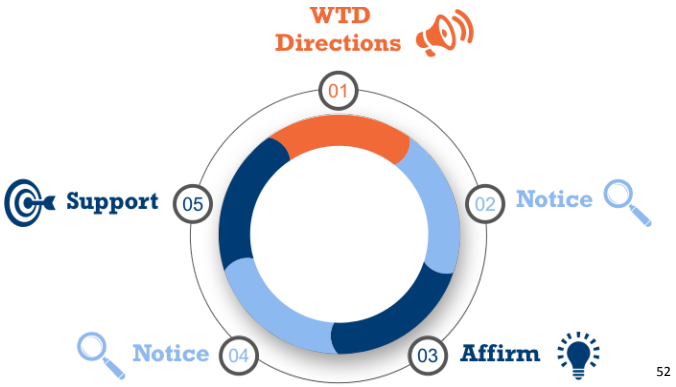
[49] The relationships between school belonging and students' motivational, social-emotional, behavioural, and academic outcomes in secondary education: a meta-analytic review
[50] Using Positive Behavioral Interventions and Supports to Reduce School Suspensions
[51] https://iris.peabody.vanderbilt.edu/module/beh1/cresource/q1/p02/?utm

- *We will be kind and caring*

Student Support Cycle

The Gate School will customize a student support framework which outlines a simple cycle of adult behaviors that we believe are critical to meeting our culture vision. This cycle encourages our staff to develop skills in four areas, guided by trauma-informed principles:

1. Giving clear directions
2. Attentively noticing individual students and what affirmations and/or supports that might need
3. Actively affirming students both for who they are and for the ways they are contributing to a safe, productive, and caring community
4. Actively supporting students that are struggling to meet norms and/or be safe, productive, or caring. In partnership with Valor, training and support will be provided to Gate School staff members on the implementation of these four skills.



[52]

The Gate School's Path System

The Gate School's Path system is designed to promote student growth, self-regulation, and consistent expectations across classrooms. The primary purpose of the system is instructional: helping students reflect on their choices, repair harm, practice replacement behaviors, and remain connected to learning and community. Staff members are trained not only in the implementation of the system, but also in its underlying philosophy so that students experience clear feedback, consistent expectations, and meaningful opportunities to reflect, repair, and grow.

- Staff, students, and families are introduced to this system at the start of the year to provide clear and transparent expectations. Staff will also review and norm on the behavior matrix at least quarterly to ensure equitable and consistent implementation.
- Students earn points for demonstrating commitments and meeting schoolwide expectations. Path points are attached to schoolwide incentives that reward students for their effort such as: Teaching Assistant for a day, Homework Passes, Dress Down day, Outside Lunch or treat, Lunch with a teacher of their choosing, etc.

[52] Image source: Valor Collegiate Academies

- We will leverage an AI driven data tool such as Live School to monitor both individual and house team path points effectively.
- Students can view their path points in real time at any point and receive a weekly path report to create ownership and agency over their actions at school.
- We will track and monitor the overall positivity ratio for points distributed to ensure that positive reinforcement outweighs corrective feedback and that all students experience equitable recognition.
- Our Student Advisory Council will provide feedback on this and other culture systems to ensure fair implementation and opportunities for students to practice meaningful leadership in driving towards culture goals.
- Tiered behavioral supports, aligned with our MTSS framework, provide additional guidance and interventions for students who need targeted support, helping them stay engaged, safe, and on path while minimizing exclusion from learning.
- The Path system integrates restorative practices and trauma-informed supports, ensuring that consequences are instructional rather than punitive and that students have opportunities to repair relationships, reflect, and re-engage in learning safely. For example:
  - Students in need of a reset will do so in a dedicated space known as the Path Reset Room where a staff member will support reflection and regulation skills.
  - Students may earn back some of their lost points by completing a reflection, taking responsibility for their actions, or repairing harmed relationships. This approach aligns to our core belief that an effective discipline policy is instructional, not punitive.
  - Higher level consequences include partnership with families to understand potential student needs impacting behavior and work in collaboration to support the student to thrive in school.

Level	Example Behaviors	Restorative/Instructional Response	Accountability Measure
Reminder	● Not following directions ● Missing materials for class ● Minor disruptions	Notice and affirm when student corrects; look for opportunities to earn back points	Minor point deduction (1)
Recommitment	● Repeated instance of not following directions after off path point ● Continued disruptions after off path point ● Tardy to class ● Running in the building	Reflection conversation and opportunity to reset behavior Notice and affirm when student corrects; look for opportunities to earn back points	Point deduction (5)
Reset	● Disrupting others during an assessment ● Academic dishonesty ● Cell phone or device out in class ● Rough-housing (without physical harm)	Regulation support, reflection, repair conversation, family communication	Point deduction (10)
In School Reset	● Physical altercation (minor) ● Theft or destruction of property (over $25)	Structured reflection, restorative plan, reentry meeting with family	In School Re-Set (typically 1 day)
Out of School Reset	● Physical altercation (major) ● Bullying	Family partnership meeting, individualized repair plan, reintegration support	Out of School Re-Set (typically 1 day)

Bullying

The Gate School will address all allegations of bullying in full compliance with Tennessee Code Annotated § 49-6-4503 and applicable MNPS policies. Bullying is defined in accordance with state law and includes behaviors that cause physical harm, emotional distress, or create a hostile educational environment that substantially interferes with a student's education.

- **Reporting:** Students, families, and staff may report suspected bullying to any staff member or administrator; all reports are promptly elevated to partners.
- **Investigation:** The Culture Partner will investigate all reports within required timelines, including student interviews and review of relevant information.
- **Documentation:** All reported and substantiated incidents are documented and monitored for patterns.
- **Notification:** Families of involved students are notified in accordance with state and district requirements.
- **Response:** Substantiated bullying results in consequences aligned to state law and district policy, which may include out-of-school reset when required, along with appropriate supports to reintegrate into the community.

Zero Tolerance Behaviors

While we are committed to restorative practices, we will also uphold all MNPS and state requirements related to zero-tolerance behaviors. Students will receive the appropriate expulsion for any behaviors outlined identified in the MNPS zero-tolerance policy[53] (e.g. possession of drugs or firearms, class 3 threats, assault of a staff member). Our approach complies fully with Tennessee state law, including required responses to zero-tolerance offenses (T.C.A. § 49-6-3401), due process protections, and limitations on exclusionary discipline.

Supporting Multilingual Learners

For multilingual learners, we ensure that behavior expectations and restorative processes are accessible through visual supports, translated materials, and will utilize any multilingual staff, as available, to support our expectations.

Supporting Students with IEPs and 504s

Our team will proactively collaborate with special educators, families, and service providers to provide proactive support, such as behavior intervention plans, before behaviors escalate to suspension-level concerns. Students with IEPs and 504s will not be suspended for more than ten (10) days per school year, unless a Manifestation Determination Review has occurred. See Question 25 for further discussion related to our special population students.

Together, these systems create a predictable, affirming, rigorous learning environment where all students remain connected to learning and community while building the habits and skills essential for long-term success.

[53] Discipline Tables - Metropolitan Nashville Public Schools

Curriculum and Instruction

Question 18: Provide an overview of the academic plan and program of the proposed school, including any non-negotiables of the school model (e.g., advisory model, instructional methods, length of school day). Explain how this plan supports the school's mission, anticipated student population, and planned outcomes.

Our academic model aligns to our mission to cultivate student independence, effective communication, and academic excellence. The Gate School will be a rigorous, standards driven middle school that prioritizes student learning through high quality curriculum aligned to state standards, data driven improvement, and professional development aligned to our instructional model. Great teaching is the number one priority.

Non-Negotiables of our academic plan

Academic Excellence

State-approved rigorous curricula in every core subject

The Gate School has selected nationally recognized programs that have been independently reviewed and validated by EdReports[54] for their alignment to standards, rigor, and support for diverse learners. Our proposed curriculum includes:

- **English Language Arts:** EL Education
- **Mathematics:** Open Up Resources
- **Science:** OpenSciEd
- **Social Studies:** TCI's History Alive!

Each of these curricula not only aligns with Tennessee state standards but also complements our instructional philosophy of inquiry, discussion, and collaboration. By adopting these high-quality materials, all students will have access to challenging, grade-level work that builds knowledge, communication skills, and prepares them for the high school of their choice.

Daily Instruction in Core Content Areas

Every student receives daily instruction in all four core content areas, English Language Arts, Math, Science, and Social Studies for 55 minutes. We believe this is especially critical in the middle school years, when students are developing the foundational knowledge, habits, and academic stamina needed for high school success. Daily exposure ensures that students build skills consistently, avoid gaps in learning, and make steady progress toward mastery of grade-level standards. Research[55] shows that regular, uninterrupted time in core subjects leads to stronger long-term academic outcomes, particularly for students who may enter middle school below grade level. By embedding all four subjects into each day, we ensure that every student has access to a well-rounded, rigorous academic program that prepares them to excel in high school and beyond.

[54] Celebrating a Decade of EdReports Impact
[55] Best Practices for Improving Middle Schools

Accelerated Pathways

At TGS we believe in accelerating learning for all students. Research on accelerated learning from TNTP[56] shows that students who experienced learning acceleration struggled less and learned more than students who started at the same level but experienced remediation instead. Even more specifically, students who experienced learning acceleration completed 27% more grade level assignments than remediated classrooms. At TGS we expect all students to matriculate to high school with at least two high school credits- Algebra I (G02H00), Computer Science Foundations (G02H14), or Spanish I (G24H04)- all of which will be offered to all students. In addition, students will have the opportunity to take Geometry (G02H11) if they are ready for additional acceleration.

These accelerated pathways offer students a strategic advantage during the most pivotal transition year in secondary school, ninth-grade. Tennessee students must earn 22 credits to graduate, and research consistently shows that ninth-grade course performance and credit accumulation are among the strongest predictors of on-time high school graduation[57]. Students who completed these types of accelerated coursework in High School have much stronger postsecondary and earnings outcomes in their early 20s than those who do not take any accelerated coursework[58].

At The Gate School, acceleration is a deliberately designed system grounded in readiness, choice, and long term opportunity that expands academic options rather than accelerating students indiscriminately. Earning high school credit in middle school allows students to enter ninth grade with greater flexibility to pursue advanced coursework, deeper electives, dual enrollment, or career-aligned pathways aligned to their interests and goals. By creating space in students' high school schedules, early credits support thoughtful course selection, sustained engagement, and long-term readiness.

Credit attainment is intentionally paired with individualized academic advising to ensure acceleration reflects readiness and purpose. Students are not required to follow a single pathway; instead, early credit enables multiple high-quality trajectories through high school while preserving depth, choice, and developmental appropriateness.

Why Algebra I Is a Non-Negotiable

Algebra I is the single course that determines whether a student can reach Calculus, AP STEM coursework, and the most competitive college pathways by twelfth grade. The high school math sequence is linear — Geometry, Algebra II, Pre-Calculus, Calculus — and a one-year delay in Algebra I cascades through all four years. There is no way to recover that time later.

This is an equity issue. Black, Hispanic, and low-income students are consistently underrepresented in eighth-grade Algebra I — not because of ability, but because access depends on informal tracking, subjective recommendations, and whether a student was

[56] ACCELERATE, DON'T REMEDIATE: New Evidence from Elementary Math Classrooms
[57] The Predictive Power of Ninth-Grade GPA
[58] Promising Combinations of Dual Enrollment, AP/IB, and CTE: The College and Earnings Trajectories of Texas High School Students Who Take Accelerated Coursework

identified as "advanced" before arriving in middle school.[59] The Gate School is designed to eliminate that dependency. Every student receives daily math instruction, targeted intervention, and acceleration beginning in sixth grade, building toward Algebra I readiness by eighth grade. Our Teaching Firm ensures that the strongest math educators are in the classroom driving that progression, with the expectation of Level 4–5 TVAAS growth every year.

Universal access to Algebra I in eighth grade is not aspirational. It is how the school is built.

Rigorous Discussions and Practice

At The Gate School, students are expected to do the heavy lifting of thinking, writing, discussing, and problem solving. While great teaching includes moments of direct instruction to establish clarity and focus, the majority of every class is devoted to independent practice, exploration, and student-driven discussion. By emphasizing student ownership and intellectual engagement, we cultivate learners who are confident, curious, and prepared to tackle complex challenges.

Outstanding Teaching

Using Student Work to Drive Instruction

At The Gate School, every class begins with student thinking and exploration, and learning is intentionally built from what students bring to the table. This approach ensures that instruction is responsive, engaging, and rooted in student curiosity. We also recognize that students need quicker cycles of feedback, something most schools fail to provide. Research[60] consistently shows that timely, specific feedback is one of the most powerful drivers of student learning—helping students correct misconceptions, stay motivated, and accelerate growth.

Technology supports but never replaces this human craft. AI tools will help teachers expand their reach by:

- Generating instant exit-ticket analyses to identify student misunderstandings.
- Drafting individualized progress notes and parent updates based on student work data.
- Suggesting differentiated practice activities aligned to mastery targets

Ongoing professional development ensures this commitment to feedback remains dynamic and evolving. Teachers regularly study student work together, share exemplars, and refine systems to make feedback faster, clearer, and more actionable.

Relationship Driven

In hundreds of conversations with students, parents, and teachers, one consistent theme has emerged: great teachers care deeply about building positive relationships with students while maintaining a strong sense of professionalism. At The Gate School, our educators will embody this balance every day. They will be both warm and demanding, creating classrooms where students feel known, supported, and challenged. This combination ensures that students not only experience the joy of being cared for but also the growth that comes from being held to high expectations.

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[59] Middle School Math Acceleration and Equitable Access to Eighth-Grade Algebra

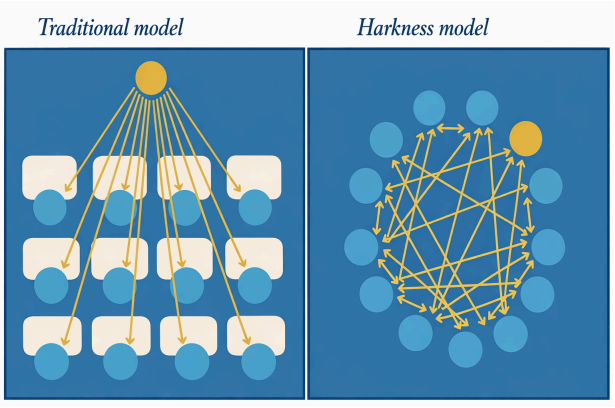
[60] The Power of Feedback Revisited: A Meta-Analysis of Educational Feedback Research

Engagement through Expertise

The third non-negotiable of great teaching at The Gate School is the ability to fully engage students through a love and deep knowledge of content. We believe students are most inspired when they learn from teachers who bring both expertise and passion into the classroom. Great teaching is not only about delivering standards-based instruction but about making content come alive - sparking curiosity, connecting ideas to the real world, and inviting students into meaningful exploration. Our educators will demonstrate mastery of their subjects and model content enthusiasm, ensuring that students see learning not as a task but as an exciting journey. This combination of engagement, expertise, and passion creates classrooms where students are motivated to think critically, push themselves academically, and develop a lasting love of learning.

Effective Communication

The Harkness Method



This research-based[61], student-driven format of thinking and discussion will be the core of humanities instruction at The Gate School. The Harkness method is a proven approach to building communication, collaboration, and critical reasoning skills, and we are proud to have experts in this methodology on our team. We maintain a direct partnership with Ensworth School, one of the country's premier Harkness programs, which has committed to supporting our teachers and leaders through professional development. Even as a private school in Nashville, Ensworth recognizes the importance of extending this work into our diverse-by-design public charter school, and we welcome this unique collaboration.

Through this partnership, our teachers will engage in ongoing learning cycles with Ensworth faculty, observing, sharing, and refining their practice together. This ensures that the Harkness method is not only implemented with fidelity but is continually improved to meet the needs of our students. Our commitment to this approach is reflected in our grading policy: 15% of every student's grade will be tied to their communication and research excellence around the Harkness table and in student exhibitions of learning. This grading emphasis signals to students, families, and teachers alike that dialogue, reasoning, and scholarly discourse are not peripheral, but central to the academic experience at The Gate School.

Student Exhibitions of Learning

Each semester, The Gate School will host a community-wide exhibition of learning where students will complete a performance based project in various courses based on defined

[61] Harkness Learning: Principles of a Radical American Pedagogy

standards-based rubric, with the expectation that they present their learning to peers, families, and the broader community. These projects will be designed in collaboration with community partners and industry professionals, giving students authentic opportunities to apply their knowledge and skills to real-world problems. These experiences will not only deepen content understanding but also strengthen critical thinking, communication, and independence. The exhibitions will showcase student projects and invite parents, community members, and industry partners to engage directly with student work. By positioning students as experts who share their research, insights, and solutions, we reinforce our commitment to rigorous learning, strong communication, and student independence.

AI Ethic

At The Gate School, we are committed to teaching students how to use AI tools ethically and responsibly in certain assignments to accelerate and deepen learning. This includes clear expectations for how AI may be used both in classrooms and at home when completing assignments. We will also make our AI ethic transparent by communicating it directly with students and families so that it becomes a core part of our community commitments. While we expect our ethical statement to continue evolving through the collaboration of our partners, associates, and families, our current iteration is as follows: *"At The Gate School, we believe Artificial Intelligence (AI) is a tool for learning and must be used responsibly. AI will never replace true learning, but when used thoughtfully it can deepen understanding and accelerate growth. Our students are expected to use AI with integrity by seeking permission from parents and teachers before using it on assignments and by always questioning, validating, and citing the sources they present as fact. In this way, AI becomes not a shortcut, but a partner in building curiosity, independence, and critical thinking."*

Students at The Gate School will make commitments around their use of AI in their learning through Seminar classes. Similarly to our Ethical Statement we expect these commitments to be a collaborative effort between staff, families and students but here is a current example.

As a student at The Gate School, I commit to using Artificial Intelligence (AI) responsibly and with integrity.

- *I understand that AI is a tool to support learning, not a replacement for my own thinking.*
- *I will seek permission from my teachers and parents before using AI to complete assignments.*
- *I will always question, validate, and cite any AI information before claiming it as fact.*
- *I will use AI to deepen my understanding, explore new ideas, and grow as an independent learner.*

By following these commitments, I will ensure that AI helps me learn more effectively while building curiosity, independence, and critical thinking.

AI Informed Differentiation

We are deeply committed to research-proven and tested AI tools to both evaluate student learning and provide differentiation within the regular classroom and in our intervention blocks. One tool we intend to use is i-Ready, because it offers adaptive diagnostics that give us a precise picture of each student's strengths and gaps, provides teachers with actionable data to target instruction, and supplies personalized practice that adjusts in real time. This makes it especially

valuable for differentiating instruction and designing effective intervention and acceleration supports.

In addition, we plan to leverage Carnegie Learning's MATHia platform and curriculum, which have been rigorously evaluated. A U.S. Department of Education[62] randomized controlled trial of 18,000 students found that MATHia nearly doubled math growth compared to typical instruction. Research has also shown that middle school students using MATHia demonstrate stronger Algebra outcomes, a critical milestone for long-term success in mathematics, and crucial to our overall mission.

Together, these tools represent a powerful combination of adaptive assessment, targeted intervention, and research-validated acceleration that will help us meet diverse student needs and ensure readiness for advanced coursework.

Other Non-Negotiables

Response to Intervention

At The Gate School, we believe that every student deserves consistent, individualized support to accelerate their learning. While Tennessee requires schools to implement RTI, many schools struggle to provide interventions without sacrificing access to enrichment or electives. To address this challenge, we have made a daily RTI/Acceleration block a non-negotiable part of our schedule. This dedicated time ensures that students who need Tier II or Tier III supports receive them with fidelity, while students who are on or above grade level engage in targeted enrichment and acceleration opportunities.

Our RTI program is designed to be both rigorous and responsive, ensuring every student receives the right level of challenge and support. For Tier 1, students will participate in small-group book clubs where they read advanced texts and engage in Harkness-style discussions. This model not only extends their comprehension and critical thinking skills but also deepens their independence as learners and communicators. By blending rich literature with collaborative dialogue, Tier 1 students are stretched beyond grade-level expectations in a way that sharpens both their academic and interpersonal skills.

For Tier 2, we will leverage the AI-driven platform i-Ready to provide personalized, adaptive learning experiences in reading and math. This platform ensures that students who need targeted intervention receive instruction precisely at their skill level, with real-time data informing teacher decisions. For Tier 3, we will implement a more intensive support model that includes one-on-one or very small group instruction, focusing on foundational skill-building and frequent progress monitoring. This structure ensures that students with the greatest needs have consistent, individualized attention and are not left behind. Taken together, our RTI model integrates advanced enrichment, adaptive technology, and intensive supports to ensure that every student, regardless of starting point, has a clear pathway to growth and mastery.

By structuring RTI as a school-wide block, we avoid the inequity of pulling students from art, music, or PE, and we send the message that intervention and enrichment are equally valued components of the school day. This approach also empowers teachers to use real-time data such as i-Ready diagnostics and progress monitoring, to provide just-in-time supports and extensions.

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[62] https://www.carnegielearning.com/why-cl/research/

In this way, our RTI block directly aligns with The Gate School's mission of accelerating student academics, ensuring that every student has both the time and resources needed to meet or exceed grade-level expectations.

Electives and Recess

At The Gate School, we view Art as essential to supporting the whole child during the critical middle school years. Adolescence is a time of rapid physical, cognitive, and emotional development, and research[63] is clear that the arts strengthen both academic outcomes and overall well-being. Art provides students with vital opportunities for creativity, identity development, and stress relief, and participation in the arts has been shown to improve academic performance and social-emotional growth.

Physical Education supports far more than physical health. Studies from the CDC[64] confirm that daily movement improves focus, memory, and classroom behavior, while also teaching resilience and teamwork. In middle school, when students are experiencing tremendous developmental changes, PE provides both an outlet for energy and a structured way to learn the importance of perseverance, discipline, and cooperation.

Computer Science

Computer Science is a core skill that empowers students to thrive in an increasingly digital world. Computer Science develops problem-solving, creativity, and logical reasoning skills, and research shows that early exposure improves persistence, boosts academic confidence, and expands future career opportunities. The 2024 State of Computer Science Education[65] report from Code.org highlights that only 6.4% of U.S. high school students are enrolled in a foundational computer science course, and yet computing occupations represent two-thirds of all projected new STEM jobs. To address this gap, The Gate School will offer Computer Science Foundations (G02H14) to all students for high school credit, ensuring they leave middle school not only prepared for rigorous high school pathways but also with a tangible academic advantage. See question 5 for additional details.

By making a consistent enrichment block a non-negotiable, The Gate School ensures that every student has access to a balanced and holistic education. These enrichment experiences nurture joy, creativity, and self-expression while directly accelerating academic growth and equipping students with the skills they need to thrive in high school and beyond.

Finally, we prioritize daily recess, because middle school students benefit deeply from unstructured time for movement, play, and social interaction. Research from the CDC shows that physical activity during the school day improves attention, working memory, and classroom behavior, helping students return to academic learning more focused and engaged. Recess also provides a vital outlet for stress relief and supports the development of social skills such as cooperation and conflict resolution. By embedding recess as a daily non-negotiable, we ensure that students' physical, emotional, and social needs are met.

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[63] New evidence of the benefits of arts education
[64] CDC: Physical-activity-education
[65] State of Computer Science Education

Diverse by Design

The Gate School is committed to being a diverse-by-design school, intentionally recruiting students from across the Nashville community. We believe a diverse student body strengthens learning by expanding perspectives, deepening critical thinking, and preparing students to engage thoughtfully in a pluralistic society. At The Gate School, diversity is not only reflected in enrollment patterns—it is activated daily through our instructional model.

Our use of the Harkness Method is a powerful lever for realizing the benefits of a diverse learning community. In discussion-centered classrooms, students are expected to listen closely, build on one another's ideas, and engage respectfully with perspectives different from their own. The diversity of lived experiences, cultural backgrounds, and ways of thinking becomes an instructional asset, elevating the quality of dialogue and sharpening students' reasoning and communication skills. Teachers intentionally design discussions and texts that surface multiple viewpoints and guide students to interrogate ideas with evidence, curiosity, and empathy.

Through Harkness discussions, culturally responsive curriculum, and community-centered practices, The Gate School ensures that diversity leads to deeper learning rather than parallel experiences. Students learn not only to express their own ideas with clarity and confidence, but also to understand, challenge, and learn from others—skills that are essential for academic success, civic participation, and leadership in an interconnected world.

Question 19: Describe the basic learning environment for a typical student (e.g., classroom-based, independent study), including class size and structure. Explain how this plan supports the school's mission, anticipated student population, and planned outcomes.

THE GATE SCHOOL

EXAMPLE WEEKLY SCHEDULE

MONDAY, TUESDAY & THURSDAY		WEDNESDAY		FRIDAY	
7:30 AM	Doors Open	7:30 AM	Doors Open	7:30 AM	Doors Open
7:30 - 7:50 AM	Arrival-Breakfast in Cafeteria	7:30 - 7:50 AM	Arrival - Breakfast in Cafeteria	7:30 - 7:50 AM	Arrival - Breakfast in Cafeteria
7:50 - 7:55AM	Transition	7:50 - 7:55AM	Transition	7:50 - 7:55AM	Transition
7:55 - 8:00 AM	Attendance & Announcements	7:55 - 8:00 AM	Attendance & Announcements	7:55 - 8:00 AM	Attendance & Announcements
8:00- 8:55 AM	Period 1	8:00- 8:55 AM	Period 1	8:00- 8:50 AM	Period 1
8:55 - 9:00 AM	Transition	8:55 - 9:00 AM	Transition	8:50 - 8:53 AM	Transition
9:00 - 9:45 AM	RTI	9:00 - 9:45 AM	RTI	8:53- 9:38 AM	RTI
9:45 - 9:48 AM	Transition	9:45 - 9:48 AM	Transition	9:38 - 9:41 AM	Transition
9:48- 10:43 AM	Period 2	9:48- 10:43 AM	Period 2	9:41- 10:31 AM	Period 2
10:43- 10:46 AM	Transition	10:43- 10:46 AM	Transition	10:31- 10:34 AM	Transition
10:46- 11:41 AM	Period 3	10:46- 11:41 AM	Period 3	10:34- 11:24 AM	Period 3
11:41- 11:44 AM	Transition	11:41- 11:44 AM	Transition	11:24- 11:27 AM	Transition
11:44 - 12:30 PM	Lunch/Recess	11:44 - 12:30 PM	Lunch/Recess	11:27- 12:12 PM	Lunch/Recess
12:31 - 1:26 PM	Period 4	12:31 - 1:26 PM	Period 4	12:12 - 1:02 PM	Period 4
1:27-1:30 PM	Transition	1:27-1:30 PM	Transition	1:02-1:05 PM	Transition
1:31 - 2:26 PM	Period 5	1:31 - 2:26 PM	Period 5	1:05 - 1:55 PM	Period 5
2:27 - 2:30 PM	Transition	2:27 - 2:30 PM	Announcements & Dismissal Begins	1:55 - 1:58 PM	Transition
2:31 - 3:26 PM	Period 6			1:58 - 2:48 PM	Period 6
				2:48-2:51 PM	Transition
3:26 - 3:30 PM	Announcements & Dismissal Begins			2:51-3:26 PM	Community Meeting
				3:26 - 3:30 PM	Announcements & Dismissal Begins

Overview of the Daily Learning Environment

The Gate School provides a classroom-based, inquiry-driven learning environment where students engage in structured, rigorous instruction across all subjects. Students rotate through four core blocks, an intervention, and two electives, with consistent routines for discussion, independent practice, and collaborative problem-solving.

Core classes average 25-30 students, aligned to Tennessee State Board Rule. Students move through a consistent daily schedule with 50-55-minute instructional blocks that allow for deeper learning, discussion, and feedback.

A typical day includes:

- Humanities at the Harkness table
- Inquiry-based math and science instruction
- Two elective blocks
- AI-driven individualized learning and RTI² intervention

Approximately 40% of core classes include two educators lowering student-to-teacher ratios for targeted support, small-group instruction, and real-time differentiation.

Humanities (ELA + Social Studies): Daily Instruction at the Harkness Table

All Gate School Humanities classes take place every day at the Harkness table. Students sit around large oval tables that make all learners visible, accountable, and engaged. While not every class period is a full formal seminar, the table is used daily for structured academic routines such as text annotation, small-group dialogue, evidence-based conversation, paired analysis, and teacher-facilitated mini-lessons.

This setup prevents passive learning and ensures that students consistently practice high-value skills:

- Close reading and text-based analysis
- Speaking and listening with academic precision
- Supporting ideas with evidence
- Responding constructively to differing viewpoints
- Building shared understanding with peers

The teacher facilitates by prompting deeper thinking, balancing voices, modeling academic discourse, and maintaining rigorous expectations. This structure aligns to Tennessee standards and is especially impactful for students who enter with reading gaps, limited academic vocabulary, or low confidence speaking in academic settings.

Harkness Discussions

A Harkness discussion is a structured, student-led conversation where students use evidence from texts to collaboratively build understanding. Students sit in a circle or oval so they can address one another directly and take responsibility for driving the intellectual work.

During a Harkness discussion, students:

- Bring prepared notes, annotations, and questions
- Cite textual evidence to support claims
- Listen closely and respond to classmates' ideas
- Ask clarifying questions and respectfully challenge thinking

- Build on one another's reasoning to deepen analysis

How Harkness Differs From Socratic Seminar

While Harkness discussions share some surface similarities with Socratic seminars, they differ significantly in structure and teacher role. Socratic seminars are typically teacher-guided, with the teacher asking a sequence of probing questions to shape student thinking. Harkness discussions rely on student-generated questions and student-driven dialogue, with the teacher intentionally talking less while maintaining strong instructional control through observation, strategic facilitation moves, and real-time monitoring of comprehension. Harkness is more student-driven, more text-centered, and places a higher cognitive demand on students to sustain the discussion, use evidence, and build meaning collaboratively.

Teachers guide the discussion through targeted questioning, facilitation moves, and real-time monitoring of student thinking. The goal is for students to carry as much of the conversation as possible, while the teacher ensures rigor, balances participation, and immediately addresses misconceptions. This is not unstructured conversation; it is a predictable, academically rigorous method supported by clear protocols, expectations, and performance criteria. The Gate School uses full Harkness discussions regularly each week, supported by daily routines that build academic speaking, listening, evidence use, and reasoning skills.

Math and Science: Inquiry-Based Instruction

Math and science courses use an inquiry-based instructional model where learning is driven by exploration, problem-solving, and student reasoning. Teachers launch lessons by posing a problem, question, or phenomenon for students to investigate. Foundational knowledge is introduced only when it becomes necessary for students to move their thinking forward, rather than delivered upfront. This maintains curiosity, keeps students in an active role, and ensures that instruction is built from student thinking rather than teacher explanation.

In this model, students:

- Observe patterns, test ideas, and analyze results
- Debate solution paths and compare strategies with peers
- Revise models or explanations based on evidence
- Engage in both collaborative and independent inquiry tasks
- Receive targeted teacher support through small-group instruction

This structure blends deep reasoning with timely clarity, making it effective for a diverse student population. Students entering with unfinished learning are supported through scaffolding and small-group guidance, while students ready for acceleration are pushed to extend their thinking, explore multiple approaches, and take intellectual risks. This aligns directly with The Gate School's mission to develop independent thinkers, problem-solvers, and students prepared for high-school-level coursework.

Why our Learning Environment Supports our Mission and Students

The Gate School's mission focuses on academic excellence, independence, strong communication skills, and preparation for high school. The learning environment is intentionally designed to deliver on these priorities for a diverse Nashville student population, many of whom

may enter middle school with uneven academic preparation, limited access to rich discussion, and inconsistent opportunities for individualized support.

How the model directly advances the mission:

- **Daily instruction at the Harkness table strengthens the skills that matter most for high school success:** close reading, speaking with evidence, listening carefully, and reasoning publicly. For students who may arrive with literacy gaps or limited confidence in academic settings, this provides daily, structured practice using academic language in a supportive but rigorous environment.
- **Inquiry-based math and science mirror the way students will encounter STEM coursework in high school:** emphasizing conceptual understanding, problem-solving, and productive struggle. Students learn how to think through challenging problems, not simply apply procedures.
- **Small-group instruction and co-teaching ensure no student becomes invisible.** Lower student-to-teacher ratios during core instruction allow teachers to pinpoint misconceptions early, provide targeted intervention for students behind, and extend learning for those ready to accelerate.
- **AI-driven individualized learning creates a daily precision-teaching moment,** allowing students to work in their zone of proximal development while giving teachers real-time data for instruction. This tight feedback loop accelerates growth for students with unfinished learning and prevents advanced students from plateauing.
- **Predictable routines, visible engagement, and discussion-centered classrooms build independence and ownership.** Students learn how to prepare, participate, ask questions, advocate for themselves, and take academic risks—the habits required to succeed in rigorous high school environments.
- **The model gives students multiple chances every day to think aloud, write, revise, and communicate their ideas.** This frequency and consistency is rare in middle schools and directly supports the mission's emphasis on communication and independence.

The Gate School's learning environment is not built around a single strategy. Our model is a coherent system that ensures every student is known, challenged, supported, and prepared for high-school-level expectations. It meets students where they are and pushes them forward through inquiry, discussion, individualized support, and expert teaching.

Question 20: Describe the primary instructional strategies that the school will expect teachers to use and why they are well-suited for the anticipated student population. Describe the methods and systems general education teachers will have for providing differentiated instruction to meet the needs of all students.

At The Gate School, instruction is grounded in two universal frameworks, Inquiry-Based Learning (IBL) and Understanding by Design (UbD), that shape all classes, and one signature structure: the Harkness Method, used specifically in the humanities classes. Together, these approaches ensure that teaching is student-centered, rigorous, and responsive to the diverse needs of Nashville middle school students.

Across all classrooms, differentiation will not be treated as a separate program or an after-the-fact accommodation. It will be built into the way teachers plan, teach, assess, and respond to student work. Teachers will be expected to maintain grade-level expectations while providing the scaffolds, extensions, accommodations, and feedback students need to access rigorous content.

Instructional Framework Overview

Level	Strategy	Description	Applies To
Schoolwide Framework	**Inquiry-Based Learning (IBL)**	Core instructional philosophy where students construct understanding through questioning, exploration, and reasoning. Teachers scaffold inquiry and use timely feedback to drive growth.	**All Classes**
Curriculum & Planning Framework	**Understanding by Design (UbD)**	Backward design framework that starts with desired understandings and performance tasks, then plans lessons and assessments to ensure transfer of learning.	**All Classes**
Discussion-Based Pedagogy	**Harkness Method**	Structured, student-led discussions that develop reasoning, collaboration, and communication. Students engage in dialogue around an oval table using evidence to build understanding.	**Humanities Classes (ELA & History)**

Teachers will use a common differentiation cycle across these frameworks:

1. **Plan from grade-level outcomes.** Teachers begin with the standard, enduring understanding, and final performance task.
2. **Identify student needs**. Teachers review prior achievement data, formative assessment results, prerequisite skills, language demands, IEP/504 accommodations, and multilingual learner needs.
3. **Design multiple pathways.** Teachers plan scaffolds, grouping strategies, tiered tasks, vocabulary supports, extension opportunities, and checks for understanding.
4. **Respond during instruction.** Teachers use questioning, modeling, small-group instruction, conferencing, peer collaboration, and real-time feedback to adjust instruction.
5. **Review evidence and revise.** Teachers analyze student work and assessment data weekly to determine reteaching, intervention, enrichment, and next steps.

This cycle ensures that all students work toward the same rigorous learning goals while receiving different levels and types of support based on need.

Inquiry Based Learning

Inquiry-Based Learning is the heartbeat of instruction at The Gate School. Rather than memorizing or passively receiving information, students ask questions, investigate problems, and construct understanding through guided exploration. Teachers launch each lesson with authentic problems or texts that prompt curiosity and push students to make meaning.

This approach is particularly well-suited for our anticipated population because it provides multiple entry points into rigorous work. Students with unfinished learning access challenging

material through guided exploration, while advanced learners engage in deeper analysis and synthesis.

Teachers will differentiate inquiry-based lessons by using tiered tasks, strategic grouping, guided questions, small-group instruction, vocabulary supports, visual models, sentence frames, and extension prompts. For example, students working toward the same essential question may receive different levels of text support, different guiding questions, or different roles within a group investigation. Students who need additional support may receive prerequisite skill mini-lessons, worked examples, or teacher conferencing. Students who are ready for extension may be asked to compare multiple sources, generate additional questions, design an investigation, or defend a more complex claim with evidence.

IBL develops independence and persistence, empowering students to take ownership of their learning. Research[66] on inquiry-based classrooms shows increases in engagement, problem-solving ability, and motivation, particularly when paired with consistent feedback and teacher facilitation, two core components of our model.

Understanding by Design

The Gate School uses the Understanding by Design framework to ensure that instruction and assessment are purposeful, coherent, and equitable. Teachers at The Gate School plan backward from established unit assessments and performance-based tasks, ensuring that daily lessons and learning experiences intentionally build toward these outcomes. This backward design approach keeps instruction focused on the essential understandings and skills students must master, while ensuring alignment between teaching, assessment, and student performance.

UbD ensures differentiation is intentional rather than reactive. Teachers plan multiple pathways to reach the same enduring understandings, adjusting scaffolds, materials, and pacing to meet students where they are. Assessments vary by format: debates, essays, projects, or traditional assessments, giving all students opportunities to demonstrate mastery in ways that leverage their strengths.

Each unit plan will include a differentiation plan that identifies prerequisite skills, key vocabulary, likely misconceptions, student grouping opportunities, scaffolds for students with disabilities and multilingual learners, supports for students with unfinished learning, and extension opportunities for advanced learners. Teachers will use this planning process to anticipate barriers before instruction begins rather than waiting until students fail to demonstrate mastery.

For example, in a humanities unit, all students may work toward the same final evidence-based argument. Some students may receive annotated texts, vocabulary previews, sentence frames, guided notes, or small-group instruction. Other students may be asked to compare multiple texts, develop counterclaims, lead portions of a discussion, or complete an extension research task. The learning goal remains consistent, but the pathway is responsive.

Understanding by Design is grounded in research on backward planning, curriculum coherence, and instructional alignment that shows clear learning goals and aligned assessments are strongly

[66] Systematic review of inquiry-based learning: assessing impact and best practices in education.

correlated with higher student achievement and equity of outcomes. Recent studies[67] confirm that when teachers use backward design to plan lessons and assessments from clear targets, students demonstrate stronger conceptual mastery and transfer across contexts.

Backward design also supports intentional differentiation rather than after-the-fact accommodations. By starting with essential understandings and designing multiple pathways to those goals, teachers can plan varied scaffolds, flexible pacing, and multiple assessment formats that meet students where they are while maintaining rigor. This planning approach has been linked[68] to improved access to grade-level content for historically underserved students and reduced instructional variability across classrooms.

The Harkness Method

Within the humanities, English Language Arts and History, use the Harkness Method as the core discussion structure. Around an oval table, students engage in student-led dialogue where the goal is not to give the "right answer," but to think critically, listen deeply, and build understanding together. This approach is supported by research[69] demonstrating that classrooms with high levels of student participation and teacher-facilitated dialogue that builds on students' prior contributions are positively associated with gains in curriculum mastery and student learning attitudes.

Teachers act as facilitators, prompting evidence use, modeling reasoning, and giving direct feedback through observation rubrics. Every student rotates through roles such as participant, note-taker, and evaluator, which supports equitable participation, accountability, and metacognition.

The Gate School will not assume that students automatically know how to discuss complex texts or ideas. Harkness discussions will be explicitly taught and differentiated so that each student can participate meaningfully. Teachers will teach and model how to use evidence, build on a peer's idea, ask clarifying questions, disagree respectfully, and revise thinking.

Teachers will differentiate Harkness discussions through preparation protocols, student roles, sentence stems, vocabulary previews, annotated texts, discussion maps, peer rehearsal, and targeted feedback. Students who need more support may enter the discussion with prepared evidence, assigned entry questions, a structured role such as evidence-finder, summarizer, connector, or questioner, or a chance to rehearse their thinking with a peer before the full discussion. Students who are ready for extension may be asked to synthesize across texts, introduce counterclaims, facilitate portions of the discussion, or evaluate the strength of the group's reasoning.

The Harkness approach is particularly effective for The Gate School's anticipated student population:

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[67] Principles of Collaborative Education Research With Stakeholders: Toward Requirements for a New Research and Development Infrastructure
[68] Effective Teacher Professional Development
[69] Teacher-student dialogue during classroom teaching

- **For multilingual learners**, it builds academic vocabulary and structured oral language through sustained, supported discussion.
- **For students below grade level**, it strengthens comprehension and confidence by making thinking visible through verbal reasoning and peer interaction.
- **For advanced learners**, it provides authentic intellectual challenge and voice through extended analysis and synthesis.

Our partnership with Ensworth School, a nationally recognized leader in Harkness instruction, ensures that teachers receive expert professional development in facilitating discussions that are inclusive, rigorous, and aligned with research on effective classroom dialogue.

Teachers will use Harkness observation tools to track participation, evidence use, listening, questioning, academic vocabulary, and reasoning. This data will help teachers identify which students may need additional support with comprehension, oral language, confidence, academic vocabulary, or discussion habits.

The Seven Core Skills

Inspired by our Ensworth partnership, all instruction at The Gate School builds seven core skills that connect IBL, UbD, and Harkness:

Core Skill	Description	How It's Developed
Critical Thinking	Analyze, evaluate, and synthesize information to reach reasoned conclusions.	Inquiry tasks, Harkness questioning, evidence-based writing.
Collaboration	Work productively and respectfully with others.	Team-based projects, Harkness dialogue norms.
Communication	Express ideas clearly and listen actively.	Daily discussions, peer feedback, exhibitions of learning.
Creativity	Generate original ideas and solutions.	Design challenges, interdisciplinary projects, art integration.
Cultural Competence	Engage across lines of difference with empathy and respect.	Diverse texts, community dialogues, cross-cultural studies.
Character	Demonstrate integrity, perseverance, and empathy.	Reflection protocols, goal-setting in Seminar.
Citizenship	Apply knowledge and skills to contribute positively to the community.	Student-led exhibitions and community service

These skills are explicitly taught, modeled, and assessed in every subject, ensuring that learning extends beyond content mastery to lifelong habits of mind.

Differentiation for All Learners

Differentiation at The Gate School is proactive, data-driven, and embedded within the design of each unit. Teachers leverage adaptive technology, co-teaching structures, and intentional grouping to ensure that every student receives the right level of challenge and support.

Method/System	What Teachers Will Do	How It Supports Differentiation
Unit Planning with Differentiation Built In	Teachers will use UbD to plan from grade-level standards and final performance tasks, then identify prerequisite skills, vocabulary demands, likely misconceptions, scaffolds, accommodations, and extension opportunities.	Ensures differentiation is planned in advance rather than added after students struggle.
Flexible Grouping and Small-Group Instruction	Teachers will group and regroup students based on current evidence of understanding for reteaching, guided practice, vocabulary support, discussion preparation, peer collaboration, or extension.	Allows teachers to respond to students with unfinished learning, multilingual learners, students with disabilities, and students ready for acceleration.
Scaffolds for Access to Grade-Level Work	Teachers will use supports such as annotated texts, sentence frames, vocabulary previews, graphic organizers, worked examples, visuals, discussion stems, checklists, and chunked tasks.	Helps students access rigorous grade-level content without lowering expectations.
Extension and Acceleration	Students who demonstrate mastery will receive deeper application through complex texts, independent research, leadership roles in Harkness discussions, advanced problem sets, additional writing challenges, or interdisciplinary projects.	Ensures advanced learners receive greater depth and complexity rather than simply more work.
Weekly Student Work and Data Review	Teachers will review exit tickets, quizzes, writing samples, discussion rubrics, student work, interim assessments, conferences, and observation notes during collaborative planning.	Creates a regular system for identifying reteaching, intervention, enrichment, accommodations, and next steps.

AI-Supported Personalization and Feedback	Teachers will use approved AI tools to help generate practice sets, vocabulary supports, reading-level scaffolds, discussion preparation prompts, writing feedback, and extension tasks aligned to unit goals. Teachers will review and adapt all AI-generated materials before use.	Increases the speed and precision of differentiation while keeping teachers responsible for instructional decisions, accuracy, accessibility, and alignment to student needs.

During RTI, all students, including English Learners, are grouped by instructional need, current performance data, and relevant proficiency information rather than grade level alone. For English Learners, grouping decisions may include ACCESS or screener results, academic skill data, language-development needs, and teacher observations to ensure students receive targeted support matched to their current needs while maintaining access to grade-level expectations.

AI supports, but never replaces, teachers. It allows for real-time progress monitoring, generates exit ticket analyses, and provides data visualizations that inform next-day instruction. Teachers then use this information to guide small-group re-teaching, enrichment, or coaching during the next class or RTI block.

This blended framework of Inquiry + UbD + Harkness + AI-informed differentiation ensures that every student, regardless of background, is challenged and supported. By combining structure, curiosity, dialogue, and data, The Gate School ensures that every child experiences learning that is personalized, intellectually demanding, and deeply human.

Question 21: Identify the curriculum the school will offer in alignment with T.C.A. § 49-6-2206 and explain the process for selecting these materials, including a description of why these materials are appropriate for the anticipated student population. If the sponsor plans to apply for a waiver to use textbooks and materials that have not been approved by the State Board, identify the high-quality instructional materials the sponsor plans to use and describe the research demonstrating that they will meet the academic needs of students. *Note that all anticipated waiver requests should be included in the Waivers section of this application.*

ELA Curriculum

The Gate School will use EL Education's 6–8 Language Arts curriculum because it offers a deeply rigorous, knowledge-driven, discussion-rich approach that complements our mission of cultivating effective communicators. The curriculum uses complex, grade-appropriate texts and sustained modules that require students to analyze, interpret, and synthesize ideas across texts. According to EdReports[70] EL provides "engaging, rigorous" core texts and tasks across reading, writing, speaking, and listening that are anchored in text rather than prior experience. Its modular design scaffolds the development of background knowledge, academic vocabulary, and writing skills, ensuring that students are challenged to think deeply, justify claims with evidence, and move beyond surface comprehension. Because EL's structure regularly incorporates

[70] EdReports EL Education Review

discussion protocols, evidence-based writing, and collaborative sense-making, it aligns well with our Harkness-inspired belief that student voice and reasoning should be central to learning.

Equally important, EL Education is designed to support all learners in our diverse-by-design school, including English learners and students with disabilities. In addition to its Supporting English Language Learners resources, the curriculum embeds structured routines, clear learning targets, and multiple modalities for accessing content, which support students with disabilities in engaging meaningfully with rigorous texts and discussions. EL provides scaffolded tasks, flexible grouping, and opportunities for oral rehearsal, visual supports, and chunked reading and writing tasks, allowing students with IEPs to access grade-level content while maintaining high expectations. These built-in supports enable teachers to differentiate instruction without lowering cognitive demand and to align accommodations with individualized learning needs.

External validation further strengthens our confidence: EL Education's curriculum received EdReports'[71] highest ratings for middle school ELA, with reviewers highlighting its coherence, alignment, and usability. By adopting EL Education, The Gate School invests in a curriculum that is rigorous, equitable, inquiry-aligned, and committed to fostering strong communicators across all student backgrounds. Because EL Education's 6–8 Language Arts curriculum is not currently on the Tennessee State Board-approved textbook list for this adoption cycle, The Gate School will request a curriculum waiver to use EL Education as its core ELA instructional material.

Math Curriculum

The Gate School will use Open Up Resources (OUR) Mathematics 6–8, 3rd Edition, because it provides a rigorous, discourse-rich curriculum that directly advances our mission of cultivating effective communicators. Every lesson is structured around problem-based tasks with multiple entry points and intentional opportunities for students to explain their reasoning, critique peer thinking, and engage in mathematical conversation. This emphasis on discourse and reasoning mirrors the habits we build around the Harkness table, ensuring that math classrooms are grounded in dialogue and collaboration as well as computation.

To ensure all students leave The Gate School prepared for advanced high school coursework, we will also implement Open Up Resources Algebra I, which is fully aligned to the same instructional philosophy and design principles as the middle grades curriculum. Open Up's Accelerated Pathways allow students to complete middle school standards early and transition seamlessly into Algebra I by 8th grade. As a result, all students will earn Algebra I credit prior to high school and enter ninth grade academically ahead of their peers.

Importantly, both Open Up 6–8 Mathematics (3rd Edition) and Open Up Algebra I have been reviewed and confirmed as fully aligned to the Tennessee Academic Standards for Mathematics, ensuring students master both grade-level content and mathematical practices required by the state.

Equally important, Open Up is validated by external research and designed to support all learners in diverse classrooms. According to the EdReports[72] review of the 3rd Edition, the curriculum

[71] EdReports EL Education Review
[72] EdReports Open Up Resources Review

"meets expectations for alignment to the standards" and "provides all students opportunities to engage in mathematical reasoning and communicate their thinking." The materials include embedded scaffolds for English Learners (through math language routines and structured academic language supports) and students with disabilities (drawing on Universal Design for Learning principles to ensure multiple means of engagement and expression). These features ensure that every student, regardless of background, can access and contribute to high-level mathematics. By adopting Open Up, The Gate School commits to a math curriculum that is rigorous, inclusive, inquiry-oriented, aligned to Tennessee standards, and fully consistent with our mission.

Science

We will use OpenSciEd for our science curriculum because it offers strong alignment with Tennessee's science standards while also deeply supporting an inquiry-driven, student-centered instructional model. OpenSciEd's middle school curriculum has been reviewed and aligned in the 6–8 cycle specifically for Tennessee, ensuring that disciplinary core ideas, science & engineering practices, and crosscutting concepts match the state's expectations. This ensures our students are engaging with rigorous, grade-appropriate content that prepares them for advanced science coursework in high school. Because OpenSciEd is built around phenomena-based investigations, it naturally aligns with our Harkness philosophy: students make observations, pose questions, develop models, and refine their understanding through collaborative discussion and inquiry rather than passive instruction.

Equally important, OpenSciEd is intentionally designed to support all learners in diverse classrooms, making it a strong fit for our diverse-by-design model. The curriculum provides multiple entry points into complex phenomena, structured scaffolds, and explicit supports for English learners and struggling students, while also challenging advanced learners. This commitment to equitable access ensures that students from varied backgrounds can contribute meaningfully to scientific dialogue and benefit from one another's perspectives. The 2023 EdReports[73] review of OpenSciEd (grades 6–8) validates its quality, noting that the program "meets expectations for alignment to the NGSS," offers strong instructional support, and provides high-quality assessments that allow students to demonstrate understanding in multiple ways. In choosing OpenSciEd, The Gate School is adopting a curriculum that is aligned to state standards, validated by independent reviewers, and purpose-built to foster rigorous, inclusive, inquiry-driven science learning for all students.

History

The Gate School will use TCI's History Alive! Social Studies curriculum because it best aligns with our vision of inquiry-driven learning and our commitment to cultivating effective communicators. TCI is designed around active learning and student discourse. It includes lessons that use role-play, simulations, debates, and collaborative problem-solving to help students wrestle with complex historical and civic issues. This approach mirrors our Harkness model, where students are expected to question, analyze, and build knowledge together rather than passively consume information. TCI also provides rich digital tools, interactive notebooks, and structured supports that ensure learning is rigorous and standards-aligned. Students don't just memorize facts; they

[73] EdReports OpenSciEd Review

actively construct meaning, evaluate perspectives, and communicate their conclusions. These skills ultimately prepare them for high school and beyond.

Equally important, TCI embeds supports for diverse learners, making it a strong fit for our diverse-by-design student body. Lessons include scaffolds for English Learners, differentiated reading materials, and multiple entry points into complex topics so that all students can access high-level content. At the same time, the curriculum emphasizes primary sources, document analysis, and argumentative writing, ensuring that rigor is never sacrificed for accessibility. This combination of academic challenge and inclusive design allows every student regardless of background to thrive in a classroom where history and civics are studied through collaboration, communication, and inquiry. By adopting TCI, The Gate School invests in a social studies program that is standards-aligned, rigorous, inclusive, and perfectly matched to our instructional model.

Computer Science

The Gate School will offer Computer Science Foundations[74], aligned to the Tennessee Career and Technical Education Computer Science Foundations standards, to ensure students develop strong foundational knowledge in computational thinking, problem solving, introductory programming, and responsible use of technology. To deliver this course, we will use the CodeHS Tennessee Computer Science Foundations curriculum, a standards-aligned, project-based program designed specifically for Tennessee schools.

CodeHS provides a rigorous yet developmentally appropriate introduction to computer science that is age appropriate for middle grade learners. Lessons emphasize explanation, collaboration, and iterative problem solving, requiring students to articulate their thinking, critique peer solutions, and apply concepts through authentic projects. This discourse-rich approach aligns closely with our instructional model and reinforces the same habits of reasoning and communication cultivated across academic subjects and at the Harkness table.

CodeHS is designed to support diverse learners. The curriculum includes scaffolded lessons, visual supports, and structured opportunities for collaboration, ensuring that students with varying prior exposure to computer science, including English Learners and students with disabilities, can engage meaningfully with rigorous content.

Foreign Language

The Gate School will offer Spanish aligned to the Tennessee World Language Standards[75], which emphasize communicative proficiency in listening, speaking, reading, and writing, as well as cultural competence. Instruction will focus on developing students' ability to use language meaningfully in interpersonal, interpretive, and presentational contexts rather than rote memorization of grammar or vocabulary.

To deliver this instruction, The Gate School will use FL4K (Foreign Language for Kids) Spanish, a proficiency-based curriculum aligned to Tennessee World Language Standards. FL4K emphasizes authentic communication, structured speaking routines, and culturally responsive content, ensuring that students regularly practice expressing ideas, engaging in dialogue, and interpreting

[74] Computer Science Foundations
[75] TN World Language Standards

language in context. This approach closely aligns with our instructional model and reinforces our commitment to cultivating confident communicators across disciplines.

Equally important, FL4K is designed to support diverse learners. Lessons include scaffolded language supports, visual cues, flexible pacing, and multiple opportunities for oral rehearsal, making the curriculum accessible to English Learners, students with disabilities, and students with varying levels of prior exposure to a second language.

Fine Arts

The Gate School will offer fine arts instruction aligned to the Tennessee Fine Arts Academic Standards, with a focus on visual art and music. Fine arts instruction will support students' creative thinking, communication, collaboration, craftsmanship, and ability to express ideas through multiple modalities.

For visual art, The Gate School will use Explorations in Art, Grades 6–8 by Davis Publications. This curriculum provides a developmentally appropriate middle school visual arts sequence focused on art-making, visual analysis, creative problem solving, reflection, and connections between art, culture, and students' lived experiences. The curriculum supports students in developing technical skills while also asking them to interpret, communicate, and revise artistic choices, making it a strong fit for The Gate School's emphasis on clear communication and visible thinking.

For music, The Gate School will use Quaver's General Music Tennessee Curriculum, Grades 6–8. Quaver provides a standards-aligned, interactive music curriculum that introduces students to music literacy, listening, performance, composition, rhythm, melody, and cultural connections. Its digital and interactive structure makes it accessible for students with varying levels of prior musical experience while still providing a coherent sequence of middle school music instruction.

Seminar

Seminar curriculum will rely on internally created frameworks that incorporate materials from multiple sources. While a full schedule of our Seminar can be found in Question 5, below is a list of components that identify key sources that will be used to create the materials.

- **AI Literacy:** Acknowledging that AI literacy does not yet have standalone Tennessee academic standards, we approach our AI Literacy lessons with the intent of Tennessee's Computer Science standards[76] woven into the impacts of computing and responsible technology use. We will use of the Computer Science Implementation Guide[77] from the State of Tennessee; adapt lessons from Common Sense Education's middle school AI Literacy curriculum; and teacher-facilitated case studies, discussions, and applied activities that revisit AI concepts in real-world contexts.
- **SEL:** To ensure strong social-emotional development through intentional instruction and consistent practice, The Gate School will integrate the Leader in Me curriculum, a widely used, evidence-informed framework grounded in Stephen Covey's 7 Habits and aligned to CASEL

[76] Tennessee K-12 Computer Science State Standards
[77] Tennessee Department of Education | June 2024

competencies. Instruction will be delivered through teacher-facilitated lessons, reflection activities, and discussion-based scenarios that connect SEL skills to real-world challenges, peer interactions, and leadership opportunities within the school community.

- **Harkness Foundations:** Recognizing that high-quality, student-led discussion requires explicit instruction and shared norms, The Gate School incorporates Harkness Foundations into Seminar. While Harkness is not a standalone curriculum, these lessons are anchored in discussion norms and facilitation practices drawn from Phillips Exeter Academy's Harkness Method and the implementation of Harkness-style discussion at Ensworth School, both of which emphasize evidence-based dialogue, active listening, equitable participation, and collaborative meaning-making.

Question 22: For schools that will serve any of grades K-5, explain how the proposed school will incorporate foundational literacy instruction in accordance with T.C.A. § 49-1-905. *If the proposed school will not serve any of grades K-5, indicate N/A.*

N/A

Question 23: For schools that will serve any of grades 9-12, describe the proposed school's plans for ensuring students have opportunities to meet college and career readiness indicators (e.g., early post-secondary opportunities, work-based learning, ACT, advanced coursework, dual enrollment). *If the proposed school will not serve any of grades 9-12, indicate N/A.*

N/A

Special Populations

Question 24: Describe the proposed school's plans to ensure adequate numbers of appropriately certified staff to support the anticipated population of students with disabilities, English Learner students, and gifted students (e.g., contract with a vendor, hire staff member(s) internally).

Special Populations

The Gate School is committed to meeting the needs of all students, including those with disabilities, English Learners, and gifted students. Our model integrates specialized support into the general education program while ensuring compliance with all federal and state requirements. We will employ a combination of certified staff, specialized instructional support personnel, and external partnerships to provide high-quality, individualized services.

To ensure that these priorities remain central to our work, The Gate School has strategically included a Senior Associate of Student Supports. This role will transition to a Student Support Partner, our highest level of leadership, by year 3. This leader will oversee all aspects of student services, including managing a case load of special education, English Learner, and gifted students. advanced learning opportunities. They will also work directly with the partner team to monitor progress, ensure compliance, and promote inclusive practices across all classrooms. By maintaining this role at the leadership level, we will consistently prioritize and reflect on how effectively we are supporting all students, particularly those requiring specialized services, and ensure that their needs shape both instructional and operational decision-making.

Students with Disabilities

Staffing and Certification Plans

Based on enrollment projections, The Gate School anticipates approximately 14% of students qualifying for special education services. The Gate School is committed to having one staff member to serve special education students per grade-level. The Senior Associate of Student Supports (role transitions to Student Supports partner in year 3), will serve as a teacher with a caseload. Here is a breakdown below:

- **Year 1:** One full-time Tennessee-certified Special Education teacher, hired at a Senior Associate level to provide both direct services and instructional leadership. This is identified in the budget on Line 26.
- **Year 2:** Two, Tennessee-certified Special Education teachers. One Senior Associate level and 1 Junior Associate Level, adjusted based on caseload intensity and service minutes. This is identified in the budget on Line 26 and 28.
- **Year 3:** Three, Tennessee-certified Special Education Teachers. One Student Support Partner (role transitions from Senior Associate of Student Supports), 1 Mid- Level Associate, and 1 Junior Level Associate. This ensures manageable caseloads and grade-level responsiveness. This is identified in the budget on Line 26 and 28.

Recruitment will prioritize candidates with experience across high-incidence and low-incidence disabilities, ensuring the team can flexibly support a range of student needs.

Paraprofessional support will be added as needed based on IEP service requirements with 1 beginning in Year 1.

To provide a full continuum of services, The Gate School will also contract with specialized service providers through a vetted local partner such as Thrive Therapies, a multidisciplinary team that offers school-based speech-language, occupational, and psychological services. This partnership will ensure timely access to evaluations, therapy, and consultation services that meet all IDEA and Section 504 requirements. Additional service providers may be engaged as needed through regional cooperatives or independent contractors.

Integration in the School Model

Special Education teachers will be fully integrated into The Gate School's instructional model, working alongside general educators to deliver inclusive, high-quality instruction. Our model emphasizes co-planning (our schedule ensures that our Co-teachers have at least 2 common planning periods a day) and co-teaching to the greatest extent possible, ensuring that students with disabilities learn in the least restrictive environment possible and benefit from high expectations and rich academic experiences.

Individualized Education Plan (IEP) goals and progress monitoring will be data-driven and embedded into weekly teacher collaboration cycles, allowing teams to analyze student progress, adapt instruction, and share strategies. Teachers will leverage technology and AI tools, including FLINT and i-Ready, to personalize learning, provide targeted interventions, and accelerate skill growth based on real-time performance data. This integration ensures that students with disabilities are not separated from core learning experiences but are instead fully supported within them.

Oversight and Leadership

Oversight of all special education and student support services will be led by the Senior Associate (Year 1) who will transition to the Student Support Partner (Year 3) and will serve as The Gate School's Special Populations Coordinator. This role is intentionally designed as a hybrid instructional and leadership position to ensure alignment between classroom practice, compliance, and schoolwide systems.

Core Responsibilities

- **Instructional coaching**
    - Coaches special education and English Learner teachers on inclusive practices, co-teaching, and implementation of accommodations
    - Collaborates with the Executive Partner to align student supports with core instruction
- **Direct student support**
    - Remains student-facing through a limited teaching assignment and/or small caseload, particularly for students with more complex needs
    - Uses classroom-based insights to inform coaching, scheduling, and service delivery decisions
- **RTI / MTSS oversight**
    - Leads the RTI/MTSS process, including intervention cycles, progress monitoring, and tier movement
    - Works with instructional teams to ensure interventions are timely, data-driven, and aligned to classroom instruction

- **Compliance and coordination**
  - Manages IEP and 504 compliance
  - Coordinates external related service providers, including Thrive Therapies
  - Participates in weekly leadership and data meetings to ensure special populations remain a standing priority in academic and operational decisions

English Learners

Staffing and Certification Plans

From the school's first year of operation, The Gate School will employ a full-time, ESL-credentialed teacher to lead instruction and support for English Learner (EL) students. This teacher will hold Tennessee ESL certification and will oversee all aspects of EL identification, assessment, instruction, and compliance with Title III and state requirements. As enrollment grows, additional ESL support staff will be added to maintain appropriate student-to-teacher ratios and ensure individualized attention. Based on our anticipated population, we have budgeted for the following:

	Year 1	Year 2	Year 3+
ESL Teacher ("EL Associate")	1	2	3
Head of Student Supports	Senior Associate	Senior Associate	Partner

The ESL teachers will collaborate closely with the Head of Student Support, who serves as the Special Populations Coordinator, to ensure that services for EL students are fully integrated into the school's broader system of supports. If specialized services such as translation, interpretation, or targeted newcomer programming are needed beyond internal capacity, The Gate School will contract with vetted providers to ensure families and students have equitable access to all resources.

Differentiation by English Language Proficiency Level

English Learner supports at The Gate School are differentiated based on students' English language proficiency, educational background, and time in U.S. schools, as determined by cumulative records, ELPA21 data, classroom assessments, and ILP goals. The school anticipates serving students across the following profiles:

- **Newcomers** (recent arrivals to U.S. schools): Receive prioritized access to Structured English Immersion / English Language **Development (ELD)** instruction focused on foundational language skills, orientation to U.S. schooling, and academic routines.
- **Active Multilingual Learners (MLs)** (ELPA21 Levels 1–3):
  Receive daily ELD support combined with sheltered content instruction and ESL push-in or pull-out services aligned to ELPA21 domains and grade-level standards.
- **Tier 1 / Tier 2 MLs** (ELPA21 Levels 3–4):
  Receive targeted language support primarily through sheltered instruction and ESL push-in services, with progress monitored through ILP goals and classroom-based language assessments.
- **Long-Term English Learners (LTELs)**:
  Receive focused instruction emphasizing academic language, writing, oral discourse, and vocabulary development, while remaining fully integrated in grade-level coursework.

- **Non-English Language Background (NELB) students**: Are monitored for continued academic success but do not receive ESL services unless new data indicate a need.

Program Delivery and Service Models

The Gate School offers a range of TDOE-approved EL service delivery models. Specific models are assigned based on student data and adjusted as proficiency evolves. Service model determinations are made following enrollment and data review and may include:

- **Structured English Immersion / ELD courses**
  - Primarily for newcomers and students scoring ELPA21 Levels 1–2
  - Scheduled during an ELD or RTI/intervention block
  - Taught by an ESL-certified teacher
  - Focuses explicitly on language development aligned to ELPA21 ELP standards
- **Sheltered Instruction**
  - Used for students accessing grade-level content with language scaffolds
  - Includes both content and language objectives aligned to ELPA21
  - Implemented by general education teachers with support from ESL staff
- **ESL Push-In / Co-Teaching Support**
  - ESL-certified teachers provide language support within general education classrooms where a non-ESL-certified teacher is the teacher of record
  - Used primarily in ELA and literacy-rich content areas
  - Focuses on academic language development while maintaining access to grade-level instruction

These service models are not static and may shift as students demonstrate growth based on ELPA21 results, ILP progress, and ongoing formative language data.

Oversight and Collaboration:

Oversight of EL programming will be coordinated by the Head of Student Support, who will ensure compliance with all state and federal mandates, manage data reporting, and oversee professional development for teachers working with EL students. The Gate School will utilize PowerSchool SIS, integrated with Ellevation Education, to maintain comprehensive student records using TNPulse, monitor English proficiency growth, and ensure timely reporting to the Tennessee Department of Education. The Head of Student Support will also ensure strong communication and engagement with families of English Learners, including translation of key documents and interpretation at family events, to promote meaningful inclusion and partnership.

This structure ensures that English Learner services are not siloed but are an integral part of The Gate School's inclusive academic model, providing rigorous, language-rich instruction that allows every student to thrive.

Gifted Students

Staffing and Certification Plans

The Gate School's academic model is intentionally designed to meet the needs of gifted and advanced learners through both staffing and curriculum. Oversight of gifted education will be led by the Head of Student Support ensuring equitable identification and compliance with all state and federal expectations.

- Starting in year 1, all core academic teachers will be trained in differentiated instruction and enrichment strategies to meet the needs of advanced learners within mixed-ability classrooms.

As enrollment grows, the school will designate a Gifted and Advanced Learning Lead Teacher, a classroom teacher with additional training or endorsement in gifted education—to support enrichment and acceleration at the classroom and team level.

- **Head of Student Support (Student Support Partner)**
  - Retains primary oversight and accountability for gifted education
  - Oversees identification, compliance, progress monitoring, and overall program quality
  - Ensures gifted services remain aligned with the school's broader student support systems
- **Gifted and Advanced Learning Lead Teacher**
  - Serves as a distributed instructional leader, in addition to core classroom instruction
  - Supports teachers with differentiation, enrichment design, and implementation
  - Coordinates classroom-level enrichment and acceleration practices under the Head of Student Support's supervision

Integration in the School Model

Gifted and advanced learners will experience depth, challenge, and acceleration across all disciplines.

- The Gate School offers opportunities for accelerated coursework and flexible pacing, including Algebra I and Geometry by 8th grade, a high school Computer Science course, and project-based capstone courses that extend learning beyond grade-level standards.
- During the AI Individualized Learning Block, adaptive platforms such as FLINT and i-Ready allow advanced students to move at their own pace, while teachers provide extension tasks and inquiry-based projects to deepen understanding.
  Harkness discussions promote critical thinking, collaboration, and intellectual curiosity, enabling advanced students to explore ideas in depth and strengthen communication and reasoning skills.

Through this intentional design, The Gate School ensures that gifted and advanced learners are both challenged academically and supported socially within a community that values curiosity, leadership, and independence.

Oversight and Continuous Improvement

The Head of Student Support will collaborate with instructional leaders to monitor the quality and equity of enrichment and acceleration opportunities.

- The school will review student performance data, teacher feedback, and family input quarterly to refine programming.
- Findings will inform professional development and curriculum adjustments, ensuring that enrichment remains rigorous, inclusive, and aligned with Tennessee standards.

This continuous improvement process ensures that The Gate School remains a place where advanced learners are nurtured, challenged, and empowered to reach their full potential.

Question 25: Explain how the school will identify and meet the learning needs of students with disabilities, including students with higher needs, in the least restrictive environment possible. Specify the programs, strategies, and supports you will provide, including the following:

- Methods for identifying students with special education needs (and avoiding misidentification);
- Specific instructional programs, practices, strategies, curriculum, and materials the school will employ to provide a continuum of services; ensure students' access to the general education curriculum; abide by required minutes; and ensure academic success for students with special education needs; and
- Plans for monitoring and evaluating the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals as set forth in the Individualized Education Program (IEP) or 504 Plan.

To ensure that we properly identify students with disabilities in compliance with Tennessee Code, IDEA, and the Rehabilitation Act of 1973, we will implement the following processes and methods:

Students with Existing Individual Education Programs (IEPs) and 504 Plans

- We will embed the identification process in our intake procedures to ensure that we identify students with existing IEPs through TNPulse who newly enroll in our school.
- We will conduct a rigorous intake process, part of which will be convening meetings with families as early as possible (i.e., spring/summer) prior to the start of school.
- As part of the intake process, we will obtain an array of documentation, including students' cumulative file to ensure we are aware of pertinent documentation such as IEPs and 504 plans.
- Also as part of the intake process, we will conduct a needs assessment, which will include asking caregivers if the child who they are enrolling has ever been evaluated for, diagnosed with, and/or received services for a disability.
- If so, we will connect with the student's previous school to obtain the IEP and/or 504 plan should we not have it already.
- The IEP and/or plan will be reviewed as part of the intake process and the creation of a plan for engaging the student's IEP team during the first month of school will be formed and documented.
- The student's IEP team will formally convene as planned during intake during the first month of school to review and make any updates to the IEP.
- All IEPs and 504 plans will be formally reviewed on an annual basis at minimum. Reevaluations will occur every 3 years, or as requested by the team.

Students Referred for Evaluation

- If a student is suspected to have a disability but has not yet been identified, the student's parents/guardian or school staff may request that the child be evaluated.
- Once requested, we will adhere to all mandated timelines around notification and evaluation.
- If the student's parents make the request, the referral for evaluation will proceed immediately and in accordance with prescribed timelines.

- We will contract with outside related service providers such as Thrive, including a licensed school psychologist, to execute the evaluation effectively.
- If the referral is generated from school staff, we will implement the following steps prior to proceeding with a referral to ensure that the student has been screened and has received tiered interventions prior to being evaluated (all of which is explained in more detail in response to below):
  - **Universal Screening:** As noted in the Assessments section, we will administer screeners to all students three times a year in ELA and math.
  - **Early Warning System (EWS):** We will implement an EWS in alignment with the guidance outlined in the TDOE's RTI2 Manual. The EWS will involve the collection of multiple sources of data such as grades, screener results, internal and external assessment data, attendance rates, behavioral records, past intervention documentation, and past instances of retention, among other data points. At minimum, an attendance indicator, a behavioral indicator, and academic competency indicator will be included in the EWS.
  - **Implement Interventions:** As explained in the Professional Development section, teachers will have time every day to collaborate, examine data, and make instructional decisions accordingly. As detailed in the response below, we have embedded time for tiered interventions during our school day. Students will undergo constant monitoring, with interventions being adjusted and/or intensified should progress not be evident.
  - **Refer for Evaluation:** If a student does not show sufficient progress after receiving the most intensive interventions, then a referral will be made to evaluate the student to determine eligibility for special education services. The evaluation will not move forward until parent/guardian permission is obtained.
  - **Create IEP:** If the results of an evaluation indicate that a student does have a disability and the parent/guardian consents to services, then an IEP will be created accordingly. The IEP will outline all mandated services, accommodations, and/or modifications, as well as articulate the student's personalized learning goals. The IEP will be implemented with fidelity and, at a minimum, will be formally reviewed annually as required by law.

The Gate School provides a full continuum of services to ensure that students with disabilities receive high-quality instruction and access to the general education curriculum in the least restrictive environment (LRE). Services are designed to meet each student's individual needs within the inclusive setting to the greatest extent possible. Each grade level will have a dedicated SPED teacher with a caseload not exceeding 15 to 18 students, providing consultative, co-taught, and small-group services as appropriate. Related services, including speech, occupational therapy, physical therapy, and behavioral supports, will be delivered through on-site and contracted providers.

Professional Development and Design

At The Gate School, it is a core expectation that every teacher is responsible for every student. Supporting students with disabilities is not confined to one department but embedded throughout the entire instructional culture.

All staff will receive ongoing professional development led by the Head of Student Support on:

- Differentiated instruction and Universal Design for Learning (UDL)
- Co-teaching models, IEP implementation, and behavioral supports

- Data analysis and progress monitoring to inform instruction

Each summer, all teachers will complete a foundational training series IEP implementation, being an active and engaged member of the IEP team and inclusive practices. During the school year, monthly sessions will address needs identified through student data, observations, and staff feedback.

Weekly collaborative planning meetings embedded into the master schedule, bring general and special educators together for a minimum of 55 minutes per week to review IEP goals, co-plan upcoming lessons, and analyze progress-monitoring data. These meetings are a required component of teachers' schedules and are reinforced and monitored by the leadership team, including the Head of Student Support and Executive Partner, to ensure fidelity and follow-through. This structure ensures that individualized supports are implemented consistently and adjusted as students' needs evolve.

The Gate School will partner with the Diverse Learners Cooperative (DLC) and Thrive Therapies to provide expert coaching in inclusive practices, executive functioning, and behavioral intervention. Through this data-driven, continuous learning cycle, The Gate School sustains a faculty culture of shared ownership, legal compliance, and instructional excellence—ensuring that students with disabilities are fully included and supported across all classrooms.

Curriculum and Materials

The Gate School has intentionally selected high-quality, standards-aligned curricula that embed scaffolds and supports for diverse learners, consistent with the principles of Universal Design for Learning (UDL) and the least restrictive environment (LRE).

Core programs include:

- **EL Education (ELA)** – Provides rich, complex texts and built-in scaffolds such as vocabulary instruction, structured discussions, and multiple modes of expression to ensure equitable access for all readers.
- **Open Up Resources / Illustrative Mathematics** – Emphasizes problem-based learning and conceptual understanding through visual models, guided questioning, and opportunities for mathematical discourse that support differentiation and high expectations.
- **OpenSciEd (Science)** – Engages students in phenomenon-based investigations that promote evidence-based reasoning and multiple entry points for inquiry and expression.
- **TCI's History Alive! (Social Studies)** – Uses storytelling, visual analysis, and interactive simulations to make history accessible through vocabulary previews, guided notes, and graphic organizers.

Together, these research-based curricula provide a cohesive instructional foundation that integrates accessibility, inquiry, and collaboration into every lesson. Aligned with The Gate School's discussion-driven and inclusive model, they ensure all students, including those with disabilities, experience both access and challenge in the general education setting.

Adaptive Technology for Diverse Learners

The Gate School leverages adaptive technology platforms, including FLINT and i-Ready, to deliver personalized instruction, real-time feedback, and targeted intervention for all learners. These tools provide continuous data that help teachers identify skill gaps, adjust instruction, and align supports to each student's learning profile and IEP goals.

- FLINT offers individualized learning pathways in literacy, critical thinking, and AI literacy, adapting content based on performance and engagement. Its dashboards allow teachers to group students flexibly and embed mini-lessons or enrichment aligned to each learner's pace and readiness.
- i-Ready serves as both a diagnostic and instructional tool in reading and math, with adaptive lessons and accessibility features, such as text-to-speech, visual cues, and interactive modeling, that ensure equitable access to grade-level content.

Integrated within The Gate School's co-teaching and data-team structures, these tools strengthen the school's commitment to individualized, high-quality instruction and empower students to take ownership of their learning progress.

Supporting Diverse Learners in the Harkness Method

At The Gate School, all students, including those with disabilities, engage in Harkness discussions where learning occurs through dialogue, inquiry, and shared exploration of ideas. The model is designed to be rigorous and accessible, applying Universal Design for Learning (UDL) to ensure every student can participate meaningfully.

Examples of UDL strategies used within Harkness discussions include:

- **Pre-discussion supports:** guided reading questions, vocabulary previews, and visual organizers that build background knowledge and confidence.
- **Multiple means of representation:** visual aids, multimedia resources, and shared digital notes that clarify complex ideas.
- **Multiple means of expression:** written reflections, oral responses, or collaborative graphic organizers that allow students to demonstrate understanding in varied ways.
- **Multiple means of engagement:** choice of discussion roles or prompts, think pair share warm-ups, and discussion trackers that promote balanced participation.
- **Targeted accommodations:** sentence stems, extended processing time, or digital contributions supported by co-teachers and aides as needed.

These strategies ensure that every learner, not only the most vocal, participates in deep, inquiry-driven learning. This inclusive approach builds communication, confidence, and critical thinking while modeling empathy and respect for diverse perspectives.

Service Delivery and Compliance

The Gate School will strictly abide by all required service minutes outlined in each student's Individualized Education Program (IEP) or 504 Plan. Service minutes will be scheduled and documented within the master schedule to ensure fidelity and consistency. The Head of Student Support, will oversee compliance, scheduling, and progress monitoring to guarantee that all students receive the services and supports to which they are legally entitled.

Key systems and practices include:

- **Service scheduling and documentation:**
  - Required minutes for each student are built into the master schedule to ensure fidelity.
  - All direct and indirect services are logged in a centralized data system that tracks frequency and duration against IEP requirements.
- **Oversight and accountability:**

  - The Head of Student Support conducts weekly reviews of service delivery and makes adjustments as needed to ensure compliance.
  - Regular progress monitoring weekly or bi-weekly, depending on the service and IEP.
- **Inclusive service delivery:**
  - The school will offer a full continuum of special education services to meet the individualized needs of students with disabilities. Inclusive services, including co-teaching, push-in supports, and the use of accommodations and modifications within the general education setting, will be provided to the greatest extent appropriate as determined by each student's IEP.
  - When required to meet IEP goals, students may receive small-group or pull-out instruction focused on targeted skill development or specialized support. These services are scheduled purposefully to minimize disruption to core instruction and to maintain consistent access to grade-level content.
  - Placement and service decisions are individualized and data-driven, ensuring that each student receives the level of support necessary to make meaningful progress while participating in the general education environment whenever appropriate.
- **Continuous improvement:**
  - Service data are reviewed each quarter to assess effectiveness and inform adjustments to supports, staffing, or scheduling.

Monitoring and Evaluating Student Progress:

The Gate School will maintain a rigorous, data-driven process to monitor the progress of all students with disabilities, ensuring alignment with each student's Individualized Education Program (IEP) or 504 Plan and compliance with IDEA and TDOE guidance.

Progress Monitoring Systems

- Progress toward IEP goals is reviewed and documented at least every nine weeks and reported to families on the same schedule as general education progress reports.
- Special education teachers collect ongoing data through formative assessments, classroom work samples, classroom observations,and adaptive platforms such as i-Ready and FLINT that provide real-time analytics on skill development. Data is collected regularly (e.g., weekly, bi-weekly) in accordance with a student's IEP goal.
- Data is used to evaluate whether students are on track to meet goals and to adjust instruction promptly when needed.

Collaboration and Oversight

- The Head of Student Support leads quarterly reviews and compliance audits to confirm service delivery and progress toward IEP goals.
- When data show insufficient progress, the IEP team reconvenes to revise goals, accommodations, or services as appropriate.

Family and Student Involvement

- Families receive regular updates on IEP progress and participate in IEP meetings to discuss data, celebrate growth, and plan next steps.
- Students are engaged in goal setting and reflection to build independence and self-advocacy skills.

- In addition, during recruitment and enrollment, families of students with individualized plans receive clear information about available supports and a designated point of contact (Head of Student Support) to discuss student needs, services, and transition planning prior to the start of the school year.

Continuous Improvement

- The leadership team aggregates IEP progress data each semester to identify trends across grades and subgroups.
- Insights from this analysis inform professional development, curriculum adjustments, and intervention design, ensuring continuous improvement and strong outcomes for students with disabilities.

Question 26: Explain how the school will meet the needs of English Learner (EL) students, including the following:

- Methods for identifying EL students (and avoiding misidentification);
- Specific instructional programs, practices, strategies, curriculum, and materials the school will employ to ensure academic success and equitable access to the core academic program for these students; and
- Plans for monitoring and evaluating the progress and success of EL students to ensure the attainment of each student's goals as set forth in the Individualized Learning Plan (ILP), including exiting students from EL services.

Identification of English Learner Students

The Gate School will ensure full compliance with federal, state, and board policies regarding English Learners (ELs), following TDOE-approved procedures to identify, serve, and support eligible students while safeguarding against misidentification.

Initial Identification Process

Upon enrollment, The Gate School obtains students' cumulative folders from previous schools (when applicable) to review prior Home Language Survey (HLS) results and determine whether a student has already been identified as Non-English Language Background (NELB), screened, exited English Learner services, or is currently receiving services. For students new to U.S. schools, families complete the HLS at enrollment. Any student whose records or HLS indicate a language other than English spoken at home, and who has not previously been determined NELB or exited services, will be screened within 30 calendar days of the start of school (or within two weeks for mid-year enrollees) using the state-approved ELPA21 Screener.

- Students who meet the state's eligibility criteria on the ELPA21 Screener will be identified as English Learners and will receive EL services.
- Students who do not meet eligibility criteria will not be identified as ELs, but their progress will be monitored during the first semester to ensure that no student in need of services is overlooked.

Avoiding Misidentification

The Gate School recognizes that accurate identification of EL students is essential to equitable access and that linguistic differences must not be mistaken for learning disabilities or low academic ability. To avoid misidentification, the school will:

- Use multiple data sources, including prior academic records, teacher observations, formative assessments, and parent input, before determining EL eligibility.
- Provide professional learning for all teachers on cultural and linguistic diversity, implicit bias, and distinguishing language acquisition challenges from learning disabilities.
- Collaborate across teams: The Students Supports Senior Associate and EL Associate will meet regularly to review cases where dual identification within EL and SPED are considered, ensuring that decisions are data-driven and compliant with both IDEA and TDOE EL guidance.
- Engage families in the identification process through translated materials, interpreters, and clear explanations of screening results and service options in the family's preferred language.

Documentation

All screening results, communication with families, and eligibility decisions will be documented and stored in TN Pulse. Identified students will have an Individualized Learning Plan (ILP) created within 30 days of identification, outlining service delivery, goals, and accommodations aligned with TDOE expectations.

Integration with The Gate School's Support Systems

This identification and monitoring process is embedded within the school's MTSS. The Student Supports Team which is composed of the ESL Coordinator, Student Supports Coordinator, and grade-level teacher leads meets every six weeks to review student progress using classroom-based language assessments aligned to ELPA21 domains, teacher-scored writing samples, oral language rubrics, observational data, and grade-level academic data, with ELPA21 scores serving as an annual benchmark. This process ensures timely adjustments to instruction and coordinated academic, language, and social-emotional supports for English Learners.

Delivery of Supports

Students who are English Learners (ELs) receive language support as outlined in their Individualized Learning Plans (ILPs), aligned to the ELPA21 English Language Proficiency (ELP) Standards.

Staffing and Ratio:

- The school maintains a maximum 35:1 student-to-ESL teacher ratio.
- A sufficient number of ESL-certified teachers are hired to maintain compliance.
- While some core teachers may be dually certified in ESL, EL services in mixed-enrollment classrooms are delivered through ESL-specific service models, not solely by the core teacher of record.

Service Time:

- EL students receive a minimum of 55 minutes of dedicated English Language Development (ELD) support daily, with service intensity adjusted based on proficiency level.

Service Delivery Models

Services are provided through TDOE-approved models and matched intentionally to student proficiency levels and instructional needs.

Structured English Immersion / ELD (Pull-Out or EL-Only Course)

- Designed for students scoring Level 1 or 2 on the most recent ELPA21 assessment and/or newcomer students.
- Delivered by an ESL-certified teacher during an ELD block or RTI/Intervention period.
- Focuses explicitly on English language development (listening, speaking, reading, writing), with instruction aligned to ELPA21 ELP standards.
- Instruction includes both language objectives and sheltered content, supporting rapid English acquisition.

Sheltered Instruction (Content-Based Support)

- Used for EL students who can access core content with language scaffolds.
- General education and ESL teachers implement Sheltered Instruction strategies, including visual supports, structured academic talk, graphic organizers, and multi-modal instruction.
- Lessons include both content objectives and language objectives aligned to ELPA21 standards to support simultaneous language and academic growth.

Co-Teaching / Push-In ESL Support

- ESL-certified teachers provide push-in language support within general education classrooms where a non-ESL-certified teacher is the teacher of record.
- This model is used primarily during ELA and literacy blocks and emphasizes language development alongside grade-level content.
- ESL and general education teachers collaborate to align instruction, scaffolds, and progress monitoring.

AI-Supported Language Development:

To complement teacher-led instruction, The Gate School will employ adaptive AI-based tools that provide individualized feedback, data insights, and targeted language practice. These include:

- FLINT, which enables real-time conversational practice, comprehension checks, and personalized feedback aligned to each student's English proficiency level. Students engage in speaking and listening activities that build confidence and fluency while providing teachers with data to inform instruction and intervention.
- i-Ready Reading and Math, which offer adaptive diagnostic and practice modules that scaffold language and content understanding. i-Ready's multilingual supports and vocabulary tools help English Learners access academic material while strengthening literacy and numeracy foundations.

These tools will be used flexibly across classrooms to extend and reinforce teacher-led instruction, providing EL students with additional opportunities for practice, self-pacing, and individualized growth. Data generated by these platforms will feed directly into each student's Individualized Learning Plans (ILP) and the school's multi-tiered system of supports (MTSS), allowing teachers to monitor progress, adjust instruction, and coordinate targeted interventions. By integrating adaptive technology within a high-quality, teacher-driven framework, The Gate School ensures that English Learners experience consistent, personalized, and rigorous language development that accelerates both English proficiency and academic achievement.

Monitoring and Evaluating Progress

We will monitor and evaluate the progress of students who are ELs toward completion of the EL program through the following processes and methods:

Ongoing Assessment and Monitoring

- Students will be assessed through a variety of methods such as teacher observation, benchmark performance, and standardized assessments.
- ESL teachers will work in collaboration with general education teachers to examine assessment data and monitor progress toward meeting language acquisition and academic goals outlined in students' ILPs (as detailed below).
- ILP goals are formally reviewed and updated at least quarterly, in compliance with required quarterly ILP updates. Progress monitoring includes student work samples, teacher observations aligned to ELPA21 domains, oral language rubrics, writing samples, and objective assessment data, ensuring language growth is documented throughout the year.
- All students who are ELs will take the ELPA21 every year to gauge progress in acquiring English proficiency.
- In addition to monitoring at the individual student level, we will comparatively analyze students' performance at the EL cohort level and students who are ELs to their native English-speaking peers.

Management of ILPs

- As required by the State Board of Education, every student identified as being EL will have an ILP.
- ILPs will be created collaboratively, with oversight from the Student Supports Coordinator, leadership from the ESL coordinator, case management from the ESL teacher, and input from general education teachers, as well as parents/guardians and students.
- ILPs will document language acquisition and academic goals, as well as progress toward meeting them (as outlined above).
- ILPs will be implemented with fidelity and progress will be reviewed every quarter; ILPs will be updated accordingly throughout the year
- ILPs will be shared with students' caregivers in the language of their preference.

Compliant Exit Procedures

- We will implement the exit criteria outlined in the State Board of Education rule.
- Once exited from the program, we will monitor and support students with additional accommodations during the 2 year transition period, following the TDOE's recommendations for transitional ELs. Specifically, as outlined by the TDOE:
  - Exiting from ESL service is based on a student's proficiency in all areas of language—listening, speaking, reading, and writing.
  - English proficiency is based on attaining fluent English proficiency on the summative, spring ELPA21 Summative Assessment.
  - EL students who score 4 or higher on all non-exempt domains on the ELPA21 Summative Assessment or score 3 or above in all non-exempt modalities of the Alt ELPA21 Summative shall be exited from Direct or Indirect ESL Services.
  - We will monitor the progress of exited ELs for two calendar years.

Student Assessment and Evaluation

Pursuant to T.C.A. § 49-13-111, public charter schools must administer state-mandated assessments (e.g., TCAP, TCAP End-of-Course Assessments, ACT, ELPA21). Pursuant to T.C.A. § 49-1-905, public charter schools must administer an approved universal reading screener to all students in grades K-3 during three administration windows each school year.

Question 27: In addition to all mandatory state assessments, identify other formative and/or summative assessments the school will use to assess student learning needs and progress throughout the year and describe the frequency with which those assessments will be administered. Explain how those assessments are aligned with Tennessee Academic Standards and the proposed school's curriculum and instructional model.

In addition to all state-mandated assessments, The Gate School will implement a comprehensive, standards-aligned assessment system that provides frequent and actionable information about each student's progress toward mastery of the Tennessee Academic Standards. This balanced system integrates diagnostic, formative, summative, performance-based, and interim assessments to ensure that instruction remains data-driven, responsive, and aligned with the school's instructional model and curriculum. Assessment results will serve as the backbone of decision-making within Response to Intervention (RTI), and the broader Multi-Tiered System of Supports (MTSS).

Here is a summary of our assessment types that will be used at the Gate School followed with a brief overview of the assessment program and oversight for additional detail:

Assessment	Assessment Type	Frequency	Leaders Responsible (At Capacity)	Who participates
i-Ready	Universal Screener	3×/year (Fall, Winter, Spring)	Instructional Partner	All students
EasyCBM	Progress Monitoring	Tier 2, every 12- weeks; Tier 3, weekly. Mid-year & EOY data checkpoints	Instructional & Student Supports Partner	Tier II and Tier III Students
FLINT	Formative Assessments	Daily classroom; FLINT exit tickets: ≥3/week; Teacher team review: weekly	Senior Associates	All students daily
Unit Assessments	Summative Assessments	At the end of each unit (per curriculum pacing). Annual review of assessments by academic leadership	Instructional Partner + Senior Associates	All students in core subjects
Performance Tasks		At least one major performance task per semester across core & electives (additional tasks as unit designs require)		All students (core & electives); presentations Involve classmates, families, and community partners

Harkness Discussions	Formative + Summative Assessments	Graded biweekly in ELA, History, and Seminar; portfolio tracking ongoing	Instructional Partner + [Humanities Focused] Senior Associate(s)	Students in ELA, History, Seminar; teachers and grade-level teams
Interim Assessments	Summative Assessments	3–4× per year (per subject)	Instructional Partner + Senior Associates	All students in core subjects; teachers and academic leadership for follow-up

Diagnostic Assessments and Progress Monitoring

In the first two weeks of school, students will complete NWEA MAP and iReady Diagnostics in reading and math. These adaptive assessments provide precise data on each student's starting point in relation to grade level standards, measuring both achievement and growth. Results are used to develop a detailed academic profile for every student and to inform initial placement for targeted RTI supports. NWEA MAP will be administered three times per year in the fall, winter, and spring to monitor overall academic growth and ensure responsiveness to instruction. iReady serves a dual purpose: it provides diagnostic insight at the start of the year and functions as the school's primary progress monitoring tool during the RTI block. Students receiving Tier 2 or Tier 3 interventions will complete short adaptive iReady checks aligned to their RTI tier, approximately every three weeks for Tier 2 and weekly for Tier 3, to measure progress toward specific skill goals. Both assessments are widely used in Tennessee and fully aligned with the Tennessee Academic Standards, allowing The Gate School to benchmark student performance against local and national norms. Diagnostic and progress monitoring data are reviewed at midyear and end of year checkpoints to evaluate growth, refine instructional groupings, and assess the effectiveness of interventions and enrichment opportunities.

Formative assessments

Formative Assessment is the cornerstone of The Gate School's instructional model and occurs daily across all classrooms. Teachers continuously assess learning through questioning, discussion, written reflections, and exit tickets that gauge real-time understanding. Each core curriculum, EL Education (ELA), Open Up Resources (Math), OpenSciEd (Science), and TCI History Alive! (Social Studies), provides embedded formative assessments aligned to Tennessee standards, ensuring that teachers can make evidence-based instructional adjustments throughout each unit. Technology enhances this process by students completing at least three weekly exit tickets from core curriculums that are added to AI platforms (ex: FLINT), which provide immediate, individualized feedback and automatically generates tailored practice assignments based on student needs. These data are instantly available to teachers, allowing them to adjust lessons, groupings, and support. Teachers review formative data collectively each week to identify patterns and adjust pacing, ensuring that instruction remains responsive to every learner.

Summative Assessments

At the conclusion of each unit, students complete curriculum-embedded summative assessments that evaluate mastery of key standards. Each of The Gate School's four core curricula includes summative assessments aligned to Tennessee Academic Standards:

- EL Education (ELA) features end-of-unit reading and writing assessments that evaluate comprehension, analysis, and written expression.
- Open Up Math provides unit assessments designed in collaboration with Illustrative Mathematics to mirror the rigor and format of TNReady items.
- OpenSciEd culminates each unit with evidence-based explanations or modeling assessments that require students to apply scientific reasoning.
- TCI History Alive! includes written assessments, short-answer responses, and document-based questions aligned with social studies inquiry standards.

Each year, the academic leadership team reviews and, if necessary, refines these assessments to ensure continued alignment with Tennessee Academic Standards, appropriate depth of knowledge, and equity across classrooms. Summative results are also analyzed alongside diagnostic and interim data to inform teacher coaching, curriculum pacing, and professional development priorities.

Performance Tasks

In addition to traditional summative assessments, The Gate School will emphasize performance tasks as authentic demonstrations of learning. These tasks are built directly into the school's four core curricula and serve as culminating opportunities for students to synthesize and apply their learning to complex, real-world challenges.

Performance tasks require students to demonstrate mastery by using knowledge in meaningful ways that mirror the expectations of higher education and the workplace. Within each curriculum, these tasks are intentionally designed to assess both content knowledge and transferable skills such as critical thinking, collaboration, problem solving, and communication.

Examples from our core curriculum:

- EL Education units conclude with authentic performance tasks such as writing and delivering a persuasive speech or publishing a research-based essay.
- OpenSciEd units ask students to develop and present models that explain scientific phenomena, such as how energy moves through an ecosystem, why certain substances undergo chemical reactions, or how forces interact to cause changes in motion.
- TCI History Alive engages students in curating exhibits or writing historical analyses.
- Open Up Math includes tasks that require students to design, model, and communicate solutions to real-world problems.

The same philosophy of authentic assessment extends to elective courses, where performance tasks serve as the primary measure of mastery. These elective performance tasks align with The Gate School's core competencies and reinforce the belief that deep learning happens when students apply knowledge through purposeful work.

- **Art:** Students complete projects and exhibitions that showcase creativity, technique, and interpretation.

- **Seminar:** Students engage in Harkness discussions, reflective writing, and community presentations that demonstrate growth in communication and self-awareness.
- **Physical Education:** Students set and track personal fitness goals, design movement routines, and reflect on teamwork and perseverance as evidence of their learning.

Students will complete at least one major performance task each semester across core and elective content areas. These tasks culminate in presentations to authentic audiences including classmates, families, and community partners, giving students the opportunity to communicate their learning, defend their reasoning, and connect academic work to their community. Through these experiences, students deepen understanding, build confidence, and practice the core competencies that define The Gate School's mission: curiosity, communication, independence, and excellence. Performance tasks are therefore not only summative assessments but essential learning experiences that reinforce student agency, intellectual engagement, and real-world readiness.

Harkness Discussions:

A cornerstone of The Gate School's instructional and assessment model is the Harkness discussion, a structured, student-led dialogue that promotes deep understanding through inquiry, reasoning, and collaboration. These discussions serve as a formative and summative assessment of students' mastery of content knowledge, critical thinking, and communication skills across disciplines.

In a Harkness discussion, students sit together around a shared table and engage in collaborative exploration of complex questions, texts, or problems. Teachers act as facilitators rather than lecturers, guiding students to use evidence, build on peers' ideas, and challenge assumptions respectfully. This model directly aligns with the Tennessee Academic Standards for Speaking and Listening, which emphasize discussion, presentation, and reasoning as essential academic competencies.

Each discussion is graded using a clear rubric that measures key skills such as preparation, active participation, evidence-based reasoning, listening, and collaborative dialogue. Teachers use individual and group feedback forms to assess both the quality of contributions and the depth of understanding demonstrated. Students also participate in self- and peer-assessment, reflecting on their performance and setting personal goals for growth in communication and collaboration.

Example Harkness Discussion Rubric:[78]			
	Speaking	**Listening / Conduct**	**Preparation**
Meets with Excellence ***(4 PTS)***	Offers insightful and original ideas. Makes specific text references in addition to making comments in the other categories (inferences, building comments, questions, predictions, clarifying comments, connections) Speaks frequently but does not dominate discussion.	Demonstrates respect for the learning process, adheres to discussion rules, and brings others into the conversation. Moves conversation forward; spearheads new ideas. Actively pays attention by demonstrating active listening (nodding, eye contact, building comments)	Thoroughly familiar with the text; concrete evidence of insightful reflection and preparation prior to discussion.
Meets ***(3 PTS)***	Offers relevant ideas. Makes comments in several categories (inferences, building comments, questions, predictions, clarifying comments, connections)	Demonstrates composure and follows discussion rules. Attempts to move the conversation forward by building on the ideas of others or offering new ideas. Speaks often but sometimes dominates discussion. Consistently pays attention.	Familiar with text; evidence of insightful reflection and preparation prior to discussion.
Partially Meets ***(2 PTS)***	Offers some valid ideas. Some ideas are not relevant. Makes comments in few categories, (inferences, building comments, questions, predictions, clarifying comments, connections)	Generally shows composure and follows some discussion rules. Generally pays attention and makes few side comments.	Partially familiar with the text; appears to have some confusion or incorrect information regarding the plot.
Failing to Meet ***(1-0 PTS)***	Does not offer any ideas. Does not speak. Makes disruptive comments.	Shows no composure and does not contribute to the progress. Appears uninvolved during discussion. Does not demonstrate active listening skills. Makes several side comments (not directed to the table).	Is not familiar with the text. Does not understand the text or did not read.

[78] Harkness Discussion Rubric

Graded Harkness discussions occur biweekly in English Language Arts, History and Seminar courses. These graded discussions are recorded and tracked as part of each student's communication portfolio, which provides evidence of growth over time in the school's core competencies of curiosity, communication, independence, and excellence. Teachers review Harkness data during grade-level team meetings alongside other formative and performance assessments to ensure students are making progress in both content mastery and academic discourse.

Interim Assessments

To monitor schoolwide progress and predict TNReady outcomes, The Gate School will administer interim assessments three to four times per year in English Language Arts, Math, Science, and Social Studies. Developed in partnership with the school's instructional partners and department heads, these in-house created assessments mirror the structure, rigor, and item types of state assessments while aligning directly with the pacing of each curriculum.

Interim assessments provide a clear snapshot of student mastery and growth across standards, enabling leadership teams to evaluate instructional effectiveness, curriculum alignment, and intervention success. Results are used to inform both schoolwide professional learning and individualized instructional planning, ensuring that all students remain on track for grade level proficiency and long-term success.

These assessments are also a critical component of the school's accountability system, serving as early indicators of progress toward The Gate School's proficiency goals. Data from each interim cycle will be analyzed to determine whether grade levels, cohorts, and subgroups are on track to meet the schoolwide goal of at least 50 percent of students meeting or exceeding expectations on state assessments. When interim results indicate that students or subgroups are off track, the academic leadership team will implement targeted instructional adjustments and intervention strategies within the RTI framework to close gaps before the next assessment window.

The Gate School's assessment system is comprehensive, coherent, and deeply aligned with its instructional model and the Tennessee Academic Standards. By combining adaptive diagnostics, daily formative measures, rigorous summative assessments, authentic performance tasks, and periodic interim evaluations, the school will create a continuous feedback loop that informs teaching, accelerates learning, and ensures that every student's progress is both visible and actionable.

Question 28: Describe how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community.

The Gate School will implement a comprehensive data-driven instruction system grounded in the framework outlined in Driven by Data 2.0[79]. The system operates on a continuous four-step cycle, assess, analyze, action plan, and act, that ensures data meaningfully informs instruction rather than simply reporting it. Teachers and leaders will use this process across multiple assessment

[79] Paul Bambrick-Santoyo, *Driven by Data 2.0: A Practical Guide to Improve Instruction* (San Francisco: Jossey-Bass, 2019).

types to continuously refine instruction, personalize support, and monitor student progress toward mastery of Tennessee Academic Standards.

AI Integration into Data Cycle

The Gate School's data ecosystem integrates innovative AI platforms and analytic tools to make data collection, analysis, and action more efficient, transparent, and impactful. The school will use systems, such as Colleague AI to centralize assessment results, classroom analytics, and instructional data into a single, user-friendly dashboard. This platform allows teachers and leaders to visualize trends, track student progress in real time, and transform complex data into clear instructional decisions. Colleague AI enables school leaders to identify patterns across grade levels, monitor subgroup performance, and generate reports that highlight both growth and areas needing additional support.

In addition to Colleague AI, The Gate School will use instructional AI platforms such as FLINT for adaptive learning and personalized feedback, and other AI-supported systems for streamlining teacher workflows, including grading, progress monitoring, and communication. Together, these tools ensure that teachers spend less time on manual data entry and more time on analysis, reflection, and responsive teaching.

This integrated data infrastructure supports the school's overarching data-driven instruction cycle, grounded in Driven by Data 2.0, by ensuring that every data point is easily accessible, immediately actionable, and shared across the school community. AI tools enhance efficiency and precision, but the focus remains on empowering teachers to make informed decisions that accelerate student learning.

Diagnostic Assessments Data Cycle

At the beginning of each school year, all students will complete diagnostic assessments such as NWEA MAP, i-Ready Diagnostics, and a writing baseline sample. These measures establish each student's academic starting point, identifying strengths, gaps, and misconceptions in foundational skills. Teachers and instructional leaders will analyze these data within the first two weeks of school to group students strategically for targeted support and extension within RTI cycles. This ensures that students who need additional practice receive immediate intervention, while students who demonstrate early mastery are challenged through enrichment and accelerated learning opportunities. Diagnostic data will also serve as a benchmark for growth monitoring throughout the year, allowing the school to measure individual and cohort progress toward proficiency goals.

Formative Assessments Data Cycle

Formative assessments are embedded throughout every unit and course as an essential part of The Gate School's instructional design. Teachers use daily exit tickets, short written reflections, and AI-adaptive tasks to monitor student understanding and adjust instruction in real time. These quick, low-stakes assessments are reviewed daily to identify patterns of misunderstanding or skill gaps, ensuring instruction remains responsive and adaptive.

In practice, students will complete daily exit tickets across all core classes, with at least three each week administered through the school's AI platform, FLINT. This platform provides students with immediate feedback and generates personalized homework assignments tailored to address

specific skill gaps or misconceptions. These adaptive tasks extend learning beyond the classroom and allow teachers to view detailed analytics on student performance and growth.

Each week, teachers will personally grade at least two exit tickets per class and provide written or verbal feedback to students. This process ensures that teachers are deeply analyzing student work and identifying trends in reasoning, misconceptions, and mastery. Reviewing a combination of AI-generated data and teacher-scored work allows for a balanced approach that values both efficiency and teacher insight.

Additionally, weekly instructional coaching meetings include a dedicated segment for reviewing formative data. During these meetings, teachers and coaches collaboratively identify class-wide trends, highlight exemplar student work, and develop concrete action steps, such as reteaching a specific concept, revising an upcoming lesson, or creating enrichment opportunities for students who demonstrate early mastery. This structured rhythm of review, reflection, and action ensures that formative assessment results directly inform next-day instruction and keep all students on track toward mastery of summative unit assessments.

Summative Assessment Data Cycle

Every two to three weeks, students complete summative unit assessments that measure mastery of priority standards taught within that instructional cycle. These assessments are drawn from our high quality curricula and mirror the rigor and item types of end-of-year expectations. Within 48 hours of each unit assessment, teachers participate in structured data meetings facilitated by instructional leaders. Using Bambrick-Santoyo's data protocols, they disaggregate results by standard, question type, and subgroup to determine root causes of student errors. Associates alongside instructional leaders then design targeted reteach lessons and flexible grouping plans to address misconceptions. These reteach lessons are implemented immediately in the following instructional week, ensuring that gaps are closed before students move forward.

Interim Assessments Data Cycle

Four times per year, The Gate School will administer interim assessments that measure cumulative mastery across multiple units and gauge progress toward grade level and end of year standards. These quarterly benchmarks, paired with NWEA MAP growth data and performance based projects, provide a comprehensive view of student progress and instructional effectiveness.

Within one week of each interim assessment, The Gate School will host a dedicated Data Professional Development (PD) Day for all teachers and instructional leaders. These full day sessions serve as structured data meetings where teachers and leaders collaboratively analyze assessment results, identify trends by standard and subgroup, and examine student growth trajectories. Guided by the data driven instruction protocols outlined in Driven by Data 2.0[80] teams focus on uncovering the root causes of student misunderstandings, celebrating areas of instructional strength, and developing targeted reteach and extension plans.

During Data Days, teachers work alongside instructional leaders to revise upcoming unit plans, pacing guides, and lesson sequences in direct response to the findings. Leaders support teams in

[80] Paul Bambrick-Santoyo, *Driven by Data 2.0: A Practical Guide to Improve Instruction* (San Francisco: Jossey-Bass, 2019).

designing reteach lessons, refining scope and sequence documents, and updating RTI and enrichment groupings to reflect the most current data. This intentional pause in the instructional calendar ensures that data analysis translates into concrete instructional action.

By embedding structured data meetings within dedicated PD time, The Gate School ensures that data reflection is not rushed or peripheral; it is central to the school's continuous improvement culture. This rhythm of quarterly assessments and Data PD Days sustains a collaborative environment where teachers and leaders refine practice together, aligning instruction to student needs and advancing the school's mission of fostering independence, mastery growth, and academic acceleration.

Instructional Quality Data Cycle

The Gate School will use academic data not only to identify student needs, but also to evaluate and improve the quality of instruction across classrooms. Leaders will analyze whether student gaps are isolated, class-wide, grade-level, or connected to instructional delivery. This ensures that data leads to changes in teaching practice, not only changes in student grouping or intervention placement.

Step	Data Reviewed	Key Question	Instructional Response
1. Identify the trend	Exit tickets, student work, unit assessments, interim assessments, AI platform analytics	Is the gap student-specific, class-wide, grade-level, or schoolwide?	Determine whether the response should be individual support, reteaching, lesson revision, or schoolwide professional development.
2. Diagnose the instructional cause	Student work samples, lesson plans, observation notes, assessment item analysis	What does the data reveal about the quality of instruction?	Identify whether the issue is related to rigor, modeling, questioning, checks for understanding, pacing, discourse, or student practice.
3. Plan the adult action	Data meeting notes, coaching observations, teacher reflection, student misconceptions	What must the teacher or team do differently?	Develop a specific action step, such as reteaching a standard, revising a lesson, strengthening questioning, improving modeling, or increasing opportunities for visible student thinking.
4. Implement and monitor	Follow-up exit tickets, revised student work, walkthrough notes, reassessment data	Did the instructional adjustment improve student mastery?	Coaches observe implementation, provide feedback, and monitor whether student learning improves after the instructional change.

This cycle ensures that data is used as a tool for instructional improvement. When multiple students or classrooms struggle with the same standard or task type, leaders will treat that pattern as an instructional quality signal, not simply a student deficit. Teachers and leaders will use the data to revise lessons, strengthen instructional delivery, adjust pacing, improve student discourse, and increase opportunities for students to explain, revise, and defend their thinking.

Through this process, The Gate School creates a continuous improvement loop: student data reveals learning trends, leaders identify instructional causes, teachers implement targeted changes, and the school monitors whether those changes improve mastery.

Data Driven Coaching and Professional Growth

At The Gate School, data informs not only how we teach students but also how we develop teachers. The school's coaching model is grounded in the belief that every educator deserves the same kind of personalized feedback and targeted support that students receive in the classroom. Through frequent observations, collaborative reflection, and structured coaching conversations, data becomes the foundation for professional learning, goal setting, and instructional improvement.

Each teacher participates in weekly coaching meetings with their instructional coach or team leader. These sessions are driven by evidence collected from classroom walkthroughs, formative assessment trends, and student performance data from summative and interim assessments. Together, the coach and teacher review student work, identify trends, and pinpoint specific instructional moves that most impact learning. Coaches use this information to co-develop short, focused goals and to plan practice-based support, such as co-teaching, modeling lessons, or revising instructional materials.

A distinctive element of The Gate School's model is its reciprocal observation structure. Every teacher both receives and provides peer feedback as part of the professional growth cycle. These observations are not always evaluative; they are collaborative learning experiences focused on instructional improvement and collective ownership of student outcomes. Teachers use shared data, including student work samples and exit ticket analysis, to anchor observation debriefs in concrete evidence of learning. This practice builds a culture where coaching is transparent, reflective, and driven by data rather than hierarchy.

The school's biweekly data meetings and quarterly Data PD Days serve as extended opportunities for collective learning. During these sessions, teachers and leaders analyze schoolwide patterns, celebrate strong results, and identify areas for growth across teams and content areas. Instructional leaders then use these insights to plan differentiated professional development, ensuring that coaching cycles are aligned to both schoolwide trends and individual teacher needs.

By integrating data-driven coaching with a reciprocal observation model, The Gate School transforms professional development into a cycle of shared inquiry and action. Teachers continually see how their instructional choices influence student outcomes and how collective practice accelerates learning. This system embodies the school's mission: to cultivate great teaching through collaboration, reflection, and a relentless commitment to student mastery.

Reporting of Data

The Gate School is committed to making data accessible, understandable, and actionable for every member of the school community. Reporting student learning data is not a compliance exercise; it is a central part of the school's mission to build trust, foster shared accountability, and empower students, families, teachers, and leaders with clear, real-time insight into progress and performance.

To achieve this, The Gate School will leverage AI-enabled data platforms such as Colleague AI to centralize, visualize, and share information across stakeholder groups. Colleague AI's dashboards will serve as the backbone of the school's transparency system, allowing leaders, teachers, and families to view clear summaries of academic progress, growth, and mastery trends. These dashboards will integrate data from multiple sources, including NWEA MAP, unit assessments, exit tickets, and RTI progress monitoring, into a unified, user-friendly view.

Teachers and Leaders

Colleague AI will make instructional data immediately accessible and easy to interpret. Teachers will be able to view class- and student-level performance data in real time, compare results across standards, and identify which students need additional support or extension. Instructional leaders will use these insights to monitor schoolwide progress, guide coaching conversations, and plan professional development. This technology streamlines reporting and eliminates the need for time-intensive manual data aggregation, allowing teachers and coaches to focus on instructional response rather than data management.

For Students and Families

Student progress data is communicated to students and families through clear, recurring structures that emphasize understanding, reflection, and ownership. Weekly Path Reports and the Colleague AI platform provide transparent and easy access to academic progress and culture indicators, creating a shared reference point for goal setting and improvement.

Quarterly, families and students receive progress reports that summarize student growth, mastery of standards, and goal attainment. This data is discussed and supported at quarterly conferences, offering a chance for collaboration and, by 8th grade, increased student ownership through student-led conferences.

Schoolwide data is shared at least twice per year through family town halls, which communicate progress toward annual mission-driven goals using key data indicators from the board's performance dashboard.

For the Board, Authorizer, and Community

At the school level, leadership will use Colleague AI's reporting features to produce quarterly updates and annual performance reports that highlight key metrics such as academic growth, proficiency, subgroup performance, and mission-aligned indicators like student independence and mastery growth. These reports will be shared with the school's governing board, authorizer, and the broader community through public presentations and the school's website. By using AI-powered data visualization tools, The Gate School ensures that information is timely, transparent, and equitable. Dashboards replace spreadsheets; data stories replace static reports. Our systems ensure that every stakeholder from a student tracking personal goals to a board

member monitoring schoolwide growth, has a clear window into how The Gate School is performing and improving. This approach not only meets accountability requirements but also deepens engagement, reinforces trust, and ensures that the entire community shares ownership of student success.

Question 29: Outline the school's strategies to identify and address academic underperformance, including plans for Response to Instruction and Intervention (RTI2) that align with Tennessee guidelines pursuant to State Board Rule 0520-01-03-.03.

The Gate School uses a comprehensive Response to Instruction and Intervention (RTI²) system aligned with Tennessee's RTI² Framework and State Board Rule 0520-01-03-.03. This framework ensures early identification of student needs, timely intervention, continuous progress monitoring, and a compliant special education referral process. The system is overseen by the Executive Partner in Year one and by both the Instructional Partner and Students Supports Partner by Year 3.

The Gate School's RTI² model is built on Tennessee's six essential components:

1. High-quality Tier I instruction
2. Universal screening
3. Tiered interventions (Tiers I–III)
4. Progress monitoring
5. Data-based decision making
6. A clearly defined special education referral process

The school's daily schedule includes a 45-minute Intervention Block, ensuring all students receive targeted supports without losing access to core instruction, electives, or enrichment.

Oversight and Leadership Structure

RTI² Leadership

Oversight of RTI² in Year 1 is jointly held by the Executive Partner and the Head of Student Supports (Senior Associate) to establish systems, ensure compliance, and coordinate early academic and behavioral interventions.

By Year 3, oversight transitions to the Instructional Partner and the Head of Student Support, who will transition into a Partner role, reflecting a more mature instructional program and ensuring sustained coherence across academics, behavior, and special education compliance.

Instructional Partner – RTI² Coordinator	Head of Student Support– Co-Lead
Primary Owner	**Collaborator (Behavior, SEL, and SPED Alignment)**
The Instructional Partner serves as the RTI² Coordinator and is primary responsibility for: ● Tier I instructional quality ● Tier II and Tier III academic interventions ● Universal screening administration ● Progress monitoring cycles ● Fidelity checks for all academic interventions	The Head of Student Support co-leads RTI² by overseeing: ● Tier II and III *behavioral* interventions ● SEL and behavior supports ● Functional Behavior Assessments (FBAs) ● Behavior Intervention Plans (BIPs) ● Coordination of the Child Find process

• Decision-making about movement across tiers • Documentation and analysis of academic data	• Special education evaluations, timelines, and compliance • Collaboration on Tier III academic cases that may require referral

This shared leadership structure maintains a single point of accountability for academic outcomes while ensuring behavioral and SPED components of RTI² are fully compliant and aligned with state expectations.

RTI² Team Members

The RTI² team includes:

- Instructional Partner (Chair)
- Student Supports Partner
- Applicable Senior Associates
- Classroom Teachers (Mid and Junior Associates)
- School Psychologist

The RTI² team meets every two weeks and holds quarterly Data Days for deeper review.

RTI² Data Review Structures

In biweekly RTI² meetings, instructional and student support leaders review EasyCBM progress-monitoring data, analyze rate-of-improvement (ROI) trends, and evaluate the fidelity and effectiveness of current interventions. Tier movement decisions are based on 6–9 data points collected over a minimum of 6–8 instructional weeks, using EasyCBMU ROI and benchmark criteria. Based on this review, teams adjust intervention groupings and make informed decisions about student movement across tiers.

Quarterly Data Days: Quarterly Data Days are dedicated times for teams to step back and do a broader analysis of student performance using MAP, i-Ready, and key classroom data. During these sessions, we identify schoolwide trends, pinpoint strengths and gaps across grade levels, and plan targeted instructional adjustments to improve outcomes. This review also helps us align supports across tiers.

Tier	Group Size	Focus	Monitoring	Frequency
Tier I	Whole class	Standards-aligned core instruction	Formative checks	Daily
Tier II	6–8 students	Targeted intervention	EasyCBM	Bi-Weekly
Tier III	3–5 students	Intensive intervention	EasyCBM	Weekly

Note: *Fidelity checks occur at least monthly per intervention cycle and are documented.*

Universal Screening and Early Identification

Consistent with Tennessee guidelines, The Gate School conducts universal screening in the first two weeks of school using:

- i-Ready diagnostic assessments
- EasyCBM benchmark probes for foundational skills

This screening data, combined with classroom formative assessments, exit tickets, and teacher observations, is reviewed by the RTI² team to identify students needing Tier II or Tier III support. Data is centrally organized in the school's RTI² dashboard and reviewed biweekly.

Tier II – Targeted Intervention (Approx. 10–15%)

Component	Description
Who	Students showing partial mastery or risk on universal screeners (i-Ready)
Teaching	All trained instructional staff
Focus	Daily targeted skill instruction in reading comprehension, foundational literacy, writing, or math fluency
Group Size	6–8 students
Progress Monitoring	EasyCBM every 1–2 weeks; reviewed in biweekly data team meetings;
Oversight	Senior Associate (SPED) Y1-2 | SPED Partner (Year 3+) verifies fidelity and adjusts groupings based on data
Movement	Students return to Tier I when they meet benchmarks; non-responders move to Tier III

Note: Parents are notified when a student enters Tier II and receive progress updates at each review cycle.

Tier III – Intensive Intervention (Approx. 3–5%)

Component	Description
Who	Students with significant skill deficits or insufficient response to Tier II
Teaching	All trained instructional staff
Focus	Daily intensive foundational skill instruction with increased modeling, scaffolding, and feedback
Group Size	Individual intervention or groups of 3–5 students
Progress Monitoring	Weekly EasyCMB; reviewed in biweekly data team meetings
Oversight	Senior Associate (SPED) Y1-2 | SPED Partner (Year 3+) Tier III verifies fidelity and adjusts groupings based on data
Movement	If insufficient progress after multiple cycles, RTI² team may initiate Child Find referral per TN RTI² Guidebook

Special Education Referral Process

The Gate School uses a clear, compliant, evidence-based referral process. SPED referral is not triggered by a single data point, instead it requires documentation of insufficient response to multiple, high-quality interventions delivered with fidelity.

Referral Steps

- **Documentation of Non-Response**
  - Multiple cycles of Tier II and Tier III interventions
  - EasyCBM progress monitoring showing inadequate ROI
  - Fidelity checks confirming intervention integrity
- **RTI² Team Review**
  - Instructional Partner, Senior Associate (Student Supports Partner in year 3), interventionist, and teachers review 12–16 weeks of data
  - Determination made whether a suspected disability exists
  - Parent notified and provided documentation
- **Initiation of Child Find Process**

    - Led by the Senior Associate and/or Student Supports Partner consistent with IDEA and Tennessee timelines.
- **Comprehensive Evaluation**
    - Conducted within mandated timelines
    - Multiple data sources included
- **Eligibility Decision + IEP Development**
    - If eligible, an IEP is developed with appropriate services and accommodations.

All procedures follow Tennessee's RTI² Implementation Guide and State Board Rule 0520-01-03-.03 requirements for documentation, decision-making, and referral timelines.

Educational Program Capacity

Question 30: Complete Table 4, adding rows as needed, to identify all individuals who are part of the proposed school. The table should include all school-based staff, board members, and all members of the applicant team identified on the Cover Sheet of this application. For members of the applicant team, please indicate whether those individuals plan to continue with the school if authorized and if so, what their role will be.

Additionally, for each individual who will be part of the proposed school, if authorized, include:

- **Attachment 2:** Resumes for each school-based staff member
- **Attachment 3:** Resumes/biographies for each board member

Table 4. Team Members

Name	City and State of Residence	Current Title and Employer	Area(s) of Expertise	Part of the Applicant Team? (Y/N)	Position in Proposed School *(e.g., board chair, school leader)*
Burrus Cox	Nashville, TN	Fellow at Nashville Incubator	Instructional Leadership	Y	Executive Partner; Ex-Offico, Member
Jim Leckrone	Nashville, TN	Executive Director at East End Preparatory School	School Leadership	Y	Operations Partner
Todd Dickson	Nashville, TN	Founder & CEO at Valor Collegiate Academies	Governance, Academic Accountability, School Leadership	Y	Board Member
Viva Price	Nashville, TN	Executive Director at Youth Encouragement Services	Governance, Financial Management, Community Engagement	Y	Board Chair
Andrea Kinzer	Nashville, TN	Director of Operations at Teach for America-Nashville	Academic Accountability, Community Engagement	Y	Board Member
Demetria Giles	Nashville, TN	Director of Curriculum at Nashville Teacher Residency	Instructional Leadership and Novice Teacher Development/ Residency	Y	Secretary

John Webb	Nashville, TN	Vice President at Pinnacle Asset Management	Financial Management	Y	Treasurer
Cate Fair	Nashville, TN	Entrepreneur and Community Leader	Literacy Instruction, Family Engagement, and Start-Up Operations	Y	Board Member
Holt Madden	Nashville, TN	Office Leasing at Boyle Investment Company	Commercial real estate, office leasing, facilities strategy, site selection, market analysis, and asset management.	Y	Board Member
Shelby Goodfriend	Nashville, TN	Director of Facilities at Nashville Incubator	School Operations Culture, & Facilities	Y	Advisor
Lisa Stone	Nashville, TN	Director of Fellows at Nashville Incubator	Leadership Development and School Culture	Y	Advisor
Rafiq Kalam Id-Din II	Brooklyn, NY	Founder and Managing Partner at Ember Charter Schools	School Leadership and Strategic Staffing	Y	Advisor
Diana Smith	Washington, DC	Chief Advisor	Discussion-Based Learning, Academic Culture, and Administrator Teaching Systems	Y	Advisor

Question 31: If the sponsor has identified a proposed principal/head of school candidate, explain why this individual is well-qualified to lead the proposed school in achieving its mission, including:

- A summary of the proposed leader's academic and organizational leadership record as it relates to the role and expectations at the proposed school
- Specific evidence that demonstrates capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in.

The Gate School will launch under the leadership of Jim Leckrone and Burrus Cox, two Founding Partners who bring complementary expertise in instructional excellence, organizational leadership, and school design. Their combined experience aligns directly with The Gate School's Teaching Firm model, in which Partners serve as senior instructional and organizational leaders, model excellent teaching, coach colleagues, and maintain coherence across academics, culture, and operations. Together, Jim and Burrus offer the rare combination of a seasoned school

founder with more than a decade of proven results and a transformational master teacher whose instruction has consistently produced exceptional student growth. Their records demonstrate clear capacity to design, launch, and sustain a high performing charter school that delivers strong outcomes for all students.

Founding Partners

Burrus Cox: Executive Partner	**Jim Leckrone:** Operations Partner
Together, Jim and Burrus offer the instructional expertise, organizational leadership, and mission alignment required to design and launch a charter school capable of delivering excellent and equitable outcomes for all students. Their combined leadership capacity supports The Gate School's mission to cultivate independence, effective communication, and academic excellence through outstanding teaching and purposeful integration of technology.	
Burrus Cox, Executive Partner, brings a record of exceptional teaching effectiveness and team based instructional leadership that reflects the teaching first focus at the heart of The Gate School model. A Fellow at the Nashville Charter Incubator, Burrus has earned a Level 5 TVAAS rating in mathematics for six consecutive tested school years and maintains a TVAAS index of 10.85, which is ten times the district average. His students have consistently achieved extraordinary academic growth. On the 2025 NWEA MAP assessment, his eighth grade math cohort performed at the 77th percentile nationally and achieved 210 percent of projected growth. His classroom has repeatedly posted the highest growth among economically disadvantaged eighth grade students in the district. His Algebra I and Integrated Math I students have reached proficiency rates between 92 percent and 100 percent, far outpacing district and state averages. Beyond his classroom results, Burrus has demonstrated meaningful leadership capacity. He served as a Grade Level Leader on a team that maintained 90 percent teacher retention across three years, mentored peers, piloted new math courses, and led collaborative professional learning grounded in Understanding by Design and Driven by Data 2.0. His leadership development also includes the AI for Equity Leadership Accelerator and the AI Enhanced Instruction Credential from	Jim Leckrone, Operations Partner, brings extensive experience in charter school design and leadership as the Founding Principal and current School Director of East End Prep, one of Nashville's highest performing open enrollment charter schools. Since 2011, Jim has led East End Prep from its launch with 80 kindergarteners to a thriving K through 8 school serving more than 865 students, including one of the highest need student populations in the city. Under his leadership, East End Prep earned Tennessee Reward School status three times, including recognition for both achievement and growth. The school has maintained top quartile performance citywide in all content areas and has been named a United States News and World Report Best Elementary School and Best Middle School for multiple years. The school also earned an A rating on Tennessee's inaugural School Report Card. Jim's leadership reflects strong organizational management, systems building, and the ability to develop and sustain a mission driven culture at scale. Jim is also deeply trained in high quality school leadership practices through the Relay National Principals Academy Fellowship, Building Excellent Schools leadership programs, and the Leveraging Leadership Institute, where he earned Gold certification in observation and feedback for his use in coaching and evaluation of staff members. He was recognized with the 2024 Proof Point Award for gap closing results

Burrus Cox: Executive Partner	**Jim Leckrone:** Operations Partner
Trevecca University, both of which strengthen his ability to lead innovative, technology integrated instruction.	with students from low income backgrounds. His preparation and demonstrated success provide clear evidence of his capacity to found and sustain a high performing charter school.

Applied School Leadership Residency and Aligned Model Development

As the Executive Partner, Burrus has completed more than 300+ hours of applied leadership development through the Nashville Charter Incubator Residency directly building the operational, instructional, and organizational skills required to launch The Gate School. This preparation includes formal training, school-based leadership practice, aligned school visits, and ongoing mentorship from founders of schools whose models closely inform The Gate School's design.

Leadership Development Area	Approximate Hours	Concrete Work Completed	Relevance to The Gate School
Instructional Coaching and Observation	**100+ hours**	Conducted live classroom observations; practiced evidence-based note taking; participated in teacher debrief and feedback cycles; studied observation and feedback systems with experienced school leaders.	Builds the skills needed to coach teachers, improve instructional quality, and lead The Gate School's Teaching Firm model.
Talent and Hiring	**40+ hours**	Designed hiring rubrics; reviewed candidate materials; screened instructional candidates; participated in interviews; studied how school leaders identify, select, and develop strong teachers.	Prepares Burrus to hire and develop The Gate School's founding instructional team.
Start-Up Operations and Launch Planning	**70+ hours**	Worked on facility acquisition planning, compliance milestones, enrollment planning, budget planning, vendor planning, and pre-opening operational sequencing.	Builds practical readiness for the operational responsibilities of a founding school leader.

Aligned School Model Study	**10 school visits across multiple states; 60+ hours**	Visited and studied Comp Sci High, The Equity Project, Ember Charter School, DC Prep, BASIS, Washington Latin Public Charter School, NuVu School, Advanced Math and Science Academy, Phillips Exeter Academy, and High Tech High. Focused deeper study on Ember's Teaching Firm-aligned staffing and leadership model, Washington Latin's discussion-based instruction and administrator teaching systems, and Exeter's use of The Harkness Method.	Helps translate proven practices from aligned public charter models into The Gate School's design.
Founder Mentorship and Model Design	**30+ hours**	Engaged in monthly consulting with Rafiq Kalam Id-Din, Founder of Ember Charter School, and bi-weekly mentorship with Diana Smith, Founder of Washington Latin, focused on school design, launch planning, hiring, discussion-based learning, and administrator teaching systems.	Provides direct coaching from founders whose experience aligns with The Gate School's academic and organizational model.
Phillips Exeter Academy, Exeter Humanities Institute *(Pending - June 21-26)*	**Approximately 50 hours of pedagogical training**	Burrus Cox has been accepted to the Exeter Humanities Institute for Educators (*June 2026*), a selective professional development program for educators implementing Harkness pedagogy.	This intensive training will deepen his expertise in facilitating student-centered discussion-based learning, core to The Gate School's instructional model.
Total Applied Leadership Development	**350+ hours**	Applied residency, school visits, founder mentorship, leadership training, and school-launch planning; targeting preparation for the Founding Executive Partner role.	

Summary of Leadership Qualifications

Category	Burrus Cox	Jim Leckrone
Proposed Role	Executive Partner	Operations Partner

Current Role	Gate School Design Team Co-Lead Fellow at the Nashville Charter Incubator	Gate School Design Team Co-Lead Founding Principal and School Director at East End Prep
Leadership Experience	Eight years as a Level 5 teacher, grade level leader, and instructional mentor	Twenty two years of school leadership and fifteen of those successfully founding a high performing K through 8 charter school
School Launch and Management Experience	Through the Nashville Charter Incubator Residency, has accumulated over 300 hours of hands-on school-launch experiences. See above for detail.	Founded and grew East End Prep from 80 to 865 students and built systems for organizational excellence and equity
Student Results	Earned a TVAAS index of 10.85 and consistently produced top-tier student growth, including 210 percent MAP growth, 100 percent Algebra I proficiency, and the highest growth for economically disadvantaged students in the district (see additional information in resume, **Attachment 2**)	School earned Tennessee Reward status three times, maintained top quartile achievement, and received an A rating on the state report card in 2023. (see additional information in resume, **Attachment 2**)
State and National Recognition	Districtwide top growth for economically disadvantaged students and multiple years of significantly outperforming district and state averages	3+ time United States News and World Report Best Elementary and Best Middle School and the 2024 Proof Point Award from leveraging leadership institute
Leadership Training	Nashville Incubator Fellowship, AI for Equity Leadership Accelerator, and Trevecca AI Enhanced Instruction Credential	Relay National Principals Academy Fellowship, Building Excellent Schools, and Gold Certification through the Leveraging Leadership Institute
Core Strengths	Instructional vision, data-driven decision making, teacher development, and curriculum and model design	Operations, culture building, systems design, financial stewardship, and organizational leadership

Question 32: Describe the collective capacity and qualifications of the currently-identified team of school-based staff (not board members) to design and execute the academic plan in areas such as:

- School leadership, administration, and governance;
- Curriculum, instruction, and assessment;
- Meeting the needs of special populations including students with disabilities, English learners, homeless students, students in foster care, migrant students, at-risk students, and gifted students;

- Performance management; and
- Parent and community engagement.

At this stage, The Gate School has not yet hired additional staff beyond the identified Founding Partners (Executive/Operations) who will serve as the initial school-based leadership team responsible for school design, academic planning, instructional systems, and pre-opening execution. However, the school has established a clear pre-opening structure in which a small group of committed advisors and future team contributors will support key academic and operational work during the planning year. While not yet formal hires, these individuals bring targeted expertise aligned to major functional areas, including curriculum development, student supports, and community engagement. This approach ensures that each core domain of the academic and organizational plan is actively supported throughout the pre-opening year, even prior to full staffing, while the school executes a sequenced hiring plan to add dedicated school-based expertise before opening.

Evidence from The Gate School Founding Team
School leadership, administration, and governance
Jim Leckrone brings 22 years of school leadership (30 years in education) and is the current School Director of East End Prep, an 865-student, three-time Tennessee Reward School recognized for both high achievement and growth. Burrus Cox has been in education for 10 years. He adds deep instructional and leadership experience as a master teacher, grade-level leader, and Nashville Incubator fellow focused on school design, governance, and sustainable leadership. Their complementary roles mirror The Gate School's Teaching Firm model, ensuring leaders remain directly connected to teaching, coaching, and shared governance.
Curriculum, instruction, and assessment
Jim and Burrus bring nearly 40 combined years of experience designing and implementing rigorous, standards-aligned instruction. Jim has led K–8 curriculum strategy at East End Prep using Understanding by Design and data-informed practices that consistently produce top-quartile results. Burrus has earned a Level 5 TVAAS rating for six consecutive years, with a TVAAS index of 10.85 and student growth results exceeding 200% of projections. Both have trained in national frameworks (Driven by Data 2.0, UBD, Relay NPAC, Leveraging Leadership Institute), grounding The Gate School's instructional systems in proven best practices, for curriculum alignment, teacher coaching, assessment analysis, and continuous improvement. Their experience directly aligns with The Gate School's model, which depends on strong instructional design, excellent questioning, visible student thinking, frequent feedback, and revision. The Founding Partners have the capacity to design the school's academic program, select and adapt curriculum, build assessment systems, and coach teachers toward the instructional bar described in the application.
Meeting the needs of special populations

The team has served schools with some of Nashville's highest percentages of economically disadvantaged students, consistently closing achievement gaps through strong RTI², SPED inclusion, and ELL support. Under Jim's leadership, East End Prep earned multiple recognitions for growth and gap closure, supported by robust MTSS systems and IDEA/504 compliance. Burrus is currently a fellow with the Nashville Incubator, which includes a professional development partnership with the Diverse Learners Cooperative. Through this work, Burrus has completed targeted training in inclusive school design, Tennessee-specific special populations compliance, and Universal Design for Learning, demonstrating an intentional focus on building strong, compliant systems to serve special populations from the school's first day of operation.
Performance management
Jim has implemented comprehensive observation, feedback, and coaching systems at East End Prep, earning Gold certification through the Leveraging Leadership Institute for excellence in instructional feedback and data use. Burrus has demonstrated the ability to use performance data (interim assessments, student outcomes, and teacher reflections) to drive sustained student growth. The team will implement a Gate-specific performance framework using real-time data to monitor student progress, teacher effectiveness, and organizational health. This system will include regular data meetings, student work analysis, observation and feedback cycles, coaching meetings, and progress monitoring. The Founding Partners' prior experience positions them to build and manage these systems during the pre-opening year and through launch, just as they have done in their classrooms and schools for support.
Family and community engagement
Both Founding Partners are lifelong Nashvillians with deep roots in the communities they serve. Jim developed long-term partnerships with organizations such as the Martha O'Bryan Center and Tennessee Performing Arts Center, building family trust and community investment. Burrus has strengthened community relationships through free tutoring, family learning sessions, and proactive outreach that informed The Gate School's design. The Gate School's community engagement approach reflects the Founding Partners' belief that families should be treated as partners in student growth. The school will continue to build relationships with families, community organizations, and local partners throughout the pre-opening year to ensure that the school's design remains responsive to the students and communities it will serve.

Identified Gaps and Plan to Fill Them

The Gate School's currently identified school-based team brings strong founding capacity in school leadership, instructional design, assessment, teacher coaching, performance management, and community engagement. The primary gaps in the currently identified school-based staff are not in the school model or academic design, but in specialized execution roles and supports that will be filled through planned pre-opening hires and strategic external partnerships.

Specifically, The Gate School will add dedicated capacity in school culture and student experience, special populations leadership for students with disabilities and English learners, back-office financial operations, and facilities planning and execution. These areas require clear role ownership before launch to ensure that the school can execute its academic plan with strong compliance systems, effective student support structures, reliable financial and operational systems, and a safe, compliant facility aligned to the instructional model.

These gaps are addressed directly in the school's staffing and support plan. During the pre-opening year, The Gate School will recruit and hire a Culture Partner and a Senior Associate role focused on special education and English learner support. The school will also use strategic external partners for specialized operational functions, including Diverse Learners Cooperative for special populations support, Vertex Education for back-office financial operations, and experienced facilities advisors to support site selection, due diligence, finance, and build-out planning.

Please see Question 33 for the full staffing plan, hiring timeline, qualifications, selection criteria, and role-specific plan to fill these identified gaps.

Question 33: Identify any gaps in the current school leadership team, including the school leader if applicable, and describe plans to fill those gaps with future hires. Discuss the timeline, qualifications, criteria, and recruiting and selection process for hiring key leadership positions.

The Gate School's founding leadership team is intentionally lean and instructional at launch, with Founding Partners overseeing academics, operations, and organizational design. Anticipated leadership gaps have been identified to ensure full execution of the school's academic model, student experience, and operational systems prior to opening.

Identified Leadership Gaps

1. **School Culture and Student Experience**
   There is a need for a dedicated leader focused on school culture, student experience, and social-emotional development is a necessary addition. As enrollment grows and the instructional model scales, responsibility for culture, behavior systems, house team/seminar programming, and daily student experience must be centralized to maintain coherence.
2. **Special Populations Leadership (Special Education and English Learners)**
   Although Special Education and EL services will be delivered by licensed instructional staff, the current leadership structure requires an elevated role that provides expert oversight, compliance assurance, and instructional coherence across both populations from day one.
3. **Back-Office Financial Operations**
   The founding team brings strong strategic and budgeting expertise; however, day-to-day financial processing (accounts payable, accounts receivable, payroll coordination, and vendor management, etc.) requires dedicated operational capacity to ensure accuracy, timeliness, and compliance as the school opens.
4. **Facilities**

While the founding team has experience with operational planning, the pre-opening phase of school launch introduces significant facilities risk that requires focused ownership and expert support. Securing a viable site, managing due diligence, coordinating design or build-out, and ensuring compliance with safety, accessibility, and charter authorization requirements are time-bound and high-stakes responsibilities. During the founding stage, these functions must be centralized and supported by experienced facilities expertise to manage timelines, control costs, and ensure the school opens in a space that is safe, compliant, and aligned to the instructional and supervision model.

Planned Leadership Hires and Supports

Culture Partner

To address culture and student experience, The Gate School will add a Culture Partner as the third instructional leadership role.

- **Role Focus**
  - School culture, climate, and student experience
  - Behavior systems and restorative practices
  - Seminar curriculum oversight
  - Family communication and student support coordination
  - Coaching teachers on classroom culture, relationships, and consistent expectations
- **Qualifications**
  - Proven record as a high-performing middle school teacher
  - Demonstrated success leading school culture or serving in a dean or assistant principal role
  - Strong alignment with discussion-based instruction and relational models
  - Ability to teach daily while serving in a leadership capacity
  - Evidence of building student culture through relationships, high expectations, consistent systems, and restorative practices, not compliance alone.
- **Timeline**
  - Recruitment begins: November 2026
  - Hire completed: January 2027

Senior Associate Student Support (Special Populations Leadership)

To fully address the needs of students with disabilities and multilingual learners, The Gate School will elevate a Senior Associate role that integrates instructional leadership with direct service. This role will ensure that special populations work is not limited to compliance or caseload management, but is connected directly to instructional quality, teacher coaching, and student access to grade-level work.

- **Role Focus**
  - Licensed special education teacher, with EL experience or certification
  - Serves as lead for IEP development, compliance, and instructional design
  - Coaches classroom teachers on inclusive practices
  - Teaches daily while maintaining oversight responsibility
- **Qualifications**

    - Target candidates with:
        - Holds a valid Tennessee Professional educator license with an endorsement in Special Education Interventionist; and English as a Second Language endorsement, as a dual-certified candidate is prioritized
        - Experience serving diverse learners in inclusive settings
        - Instructional coaching or leadership experience
        - Experience with IEP development, compliance, accommodations, modifications, progress monitoring, and teacher coaching;
        - Strong instructional judgment and the ability to support student access to grade-level work;
        - Demonstrated ability to collaborate with general education teachers, families, and service providers.
        - Expertise in special education and English learner support rooted in instructional design, teacher coaching, compliance, and student access to grade-level work, not only caseload management or service-hour delivery.
    - Compensation structured above typical teacher scale to reflect leadership responsibility.
- **Timeline**
    - Recruitment begins: November 2026
    - Hire Completed: January 2027

External Capacity Support

Special Populations Support

- The Gate School will contract with a Diverse Learners Cooperative (DLC) to supplement internal expertise, provide compliance support, and build organizational capacity.
- Diverse Learners Cooperative will support The Gate School with special populations systems, inclusive instructional practices, compliance planning, and staff development. This support will help ensure that the school is prepared to serve students with disabilities, English Learners, and other special populations from the first day of operation.
- Estimated annual cost: $10,000
- DLC will be included as part of the school's consulting and compliance support infrastructure.

Financial and Operational Leadership and Support

- **Back-Office Financial Gap:** Day-to-day financial operations (AP/AR, payroll processing, compliance reporting) are not managed directly by instructional leaders.
- **Internal Responsibility with Strategic External Partnership**
    - Operations Partner (Jim Leckrone) oversees financial strategy, budgeting, and fiscal accountability.
    - The school has already engaged Vertex Education (formerly EdTec) as a third-party back-office provider to manage:
        - Accounts payable and receivable
        - Payroll coordination

        - Financial reporting and compliance
    - Vertex Education (formerly EdTec) works in direct coordination with the Operations Partner to ensure accuracy, transparency, and alignment with board oversight.

This layered approach ensures financial rigor without diverting instructional leaders from their core responsibilities.

Facilities Leadership and Support

Facility planning and execution is supported by a combination of internal experience and external expertise:

- **Internal Responsibility with Strategic External Partnership**
    - Burrus Cox and Operations Partner Jim Leckrone co-own facility planning and execution. Jim Leckrone has vast experience as a founder and executive director overseeing facility development to support as needed. As a fellow of the Nashville Incubator, Burrus has strategic guidance from Shelby Goodfriend, Director of Facilities at the Nashville Incubator. Shelby supports with overseeing the facility acquisition, planning and execution of both short and long term facility needs for all schools in their portfolio.
    - Shelby Goodfriend is a strategic facilities advisor with experience in charter development, construction oversight, and state level compliance. As Director of Facilities at the Nashville Incubator, she guides founders through site selection, due diligence, budgeting, design, and construction. She recently supported three schools in opening on time and under budget with no debt service and advises a nine school portfolio on long term facilities strategy. Shelby previously served as Director of Charter Schools for the Tennessee Department of Education, giving her a clear understanding of the compliance, safety, and operational requirements new schools must meet. Her construction background includes delivering five new launches, two expansions, and three renovations on time at The Escape Game, along with leading facilities and renovation work as a school operations leader. Shelby's combined experience allows her to provide founders with practical, cost aware, and compliance aligned guidance at every stage of the facilities process.
- As outlined in Question 44, Burrus has worked to refine a Facility Decision-Making Matrix specific to The Gate School Needs which not only outlines the timeline for engagement of facility partners, but the roles and responsibilities for each.
- Founding Partner, Burrus Cox, is involved in rigorous facility training and professional development, including:
    - Facilities Professional Development sessions with the Nashville Incubator including:
        - Facility Partner Charrette: Building your Team
        - Your Facilities Team and their Matrix of Responsibilities
        - Facility Finance 101 led by Raymond James Public Finance team
        - Process of Facility Acquisition
        - How to Assess Site Viability
    - Finance and Real Estate Development (FRED) Conference sessions:

- A Lens into Educational Facilities Planning led by 22Beacon
- Building an A+ Team led by Facility Resource Center
- Selecting A+ Team Members led by PSWrx
- State Charter School Facilities Explained led by National Alliance for Public Charter Schools
- Financing the Future: Unlocking Capital for High-Impact Facilities led by CFC Advisors
- 9-Step FRED Framework led by Mike McGregor

Recruiting and Selection Process

The Gate School will recruit leadership candidates through both targeted outreach and open application. Open positions will be posted through national and local education job boards, Teach For America alumni networks, professional associations, university and educator preparation pipelines, and direct outreach to high-performing educators and leaders in Nashville and surrounding regions.

The selection process is designed to evaluate candidates in practice, not only on paper. All instructional leadership candidates will complete a multi-stage process that includes:

1. **Initial application and resume review** to confirm baseline qualifications, certification requirements, relevant experience, and alignment with the role.
2. **Mission and model alignment interview** with the Founding Executive Partner to assess commitment to The Gate School's instructional vision, Teaching Firm model, and belief that leaders should remain close to teaching and student learning.
3. **Demonstration lesson** observed by at least two members of the founding team. The lesson will be evaluated for instructional clarity, rigor, student engagement, responsiveness to student thinking, ability to support diverse learners, and alignment with The Gate School's model of visible thinking, frequent feedback, and grade-level work.
4. **Panel interview** with at least two members of the founding team and, when appropriate, an external advisor with expertise in the relevant domain.
5. **Reference checks** focused on prior results, leadership effectiveness, instructional skill, follow-through, collaboration, and ability to work successfully with the student population The Gate School expects to serve.
6. **Final hiring decision** by the Founding Executive Partner, with input from the founding team and relevant advisors.

For external partners and contracted roles, selection is based on demonstrated track record, direct references from schools in similar contexts, and alignment with The Gate School's operational needs and values.

Selection Criteria

Beyond credentials and experience, The Gate School will screen leadership candidates against clear selection criteria aligned to the school model and anticipated student population. Strong candidates must demonstrate:

- A record of strong student outcomes or measurable success in their area of responsibility;
- Alignment with The Gate School's instructional vision, including rigorous thinking, frequent feedback, visible student reasoning, and revision;
- Willingness and ability to teach or remain directly connected to student learning while holding leadership responsibility;
- Experience serving students and families similar to those The Gate School expects to serve, including students with disabilities, multilingual learners, students entering below grade level, and students ready for acceleration;
- A coaching orientation grounded in transparency, humility, feedback, and continuous improvement;
- Strong communication skills with students, families, staff, and external partners;
- Ability to build systems, not simply manage tasks.

Question 34: Describe the collective qualifications of the current set of board members (not school-based staff) to provide effective oversight and strategic direction in the following areas:

- Governance and fiduciary responsibilities, including compliance with legal and regulatory requirements;
- Oversight of academic performance, including holding the school leader accountable, monitoring progress toward academic goals, and ensuring alignment with the school's mission;
- Financial oversight, including budget approval, financial controls, and long-term fiscal planning; and
- Community engagement and stakeholder responsiveness, including maintaining trust and transparency with families and local partners.

Board Member Name Job Title & Organization	Governance	Academic Accountability	Financial Management	Community Engagement
Todd Dickson *Founder & CEO* Valor Collegiate Academies	X	X		
Viva Price *Executive Director* Youth Encouragement Services	X		X	X
Andrea Kinzer *Director of Operations* Teach for America Nashville		X		X
Demetria Giles *Director of Curriculum*	X	X		

Nashville Teacher Residency				
John Webb *Vice President* Pinnacle Asset Management			X	
Cate Elcan Fair *Entrepreneur and Community Leader*			X	X
Holt Madden Senior Associate Boyle Investment Company			X	X

Governance

Oversight in this area will be provided by Todd Dickson, Viva Price, and Demetria Giles through the following strengths and structures:

Board Supports	Structures
Todd Dickson, Founder and CEO of Valor Collegiate Academies, brings extensive experience establishing high-performing governance systems, ensuring compliance, and holding school leaders accountable. **Viva Price, Executive Director of Youth Encouragement Services (YES)** for eight years, contributes deep expertise in nonprofit governance, compliance, and long-term strategic planning. **Demetria Giles, Director of Curriculum of Nashville Teacher Residency,** offers leadership experience from Ember Charter Schools- a national exemplar of the "Teaching Firm" model that The Gate School is adopting. Her firsthand knowledge of that staffing framework will strengthen the board's capacity to ensure fidelity to the Teaching Model while maintaining accountability.	● Conducting quarterly compliance audits ● Reviewing authorizer-required reports ● Maintaining updated board policies ● Completing annual board training on legal obligations.

Oversight of Academic Performance

Academic oversight will be led by Todd Dickson, Andrea Kinzer, and Demetria Giles, leveraging deep instructional and leadership experience:

- **Todd Dickson** provides proven success leading Valor's top-performing academic network and expertise in setting measurable goals and monitoring results. For the second year in a row, all three Valor schools earned an "A" rating from the Tennessee State Report Card. This comprehensive measure reflects outstanding growth and student achievement, with Valor earning a perfect 5 out of 5 across every indicator assessed, including achievement, student growth, growth of highest-need students, and college & career readiness.
- **Andrea Kinzer**, educator and current **Director of Operations at Teach For America Nashville**, brings nine years of classroom and leadership experience, coaching, and data-driven practice.
- **Demetria Giles**, through her leadership at the **Nashville Teacher Residency (NTR)** and **Ember Charter Schools**, brings deep expertise in teacher development and coaching. Her

experience implementing the *Teaching Firm* model strengthens the board's ability to oversee instructional quality and strategic staffing.

The Academic Committee, chaired by Mr. Dickson, will:

- Review quarterly student-achievement dashboards.
- Analyze interim and summative assessment data.
- Evaluate the School Leader's progress toward annual academic goals.
- Provide written recommendations to the full board.

Financial Management

Financial oversight will be anchored by **Viva Price** and **John Webb**, supported by a standing **Finance Committee**:

- **Viva Price** brings significant nonprofit financial-management experience, including oversight of annual audits, grant compliance, and multi-site budgeting.
- **John Webb**, Vice President at **Pinnacle Asset Management**, brings extensive experience in investment management, asset planning, and fiscal analysis.
- **Cate Fair** will support the board's long-term sustainability work by helping expand philanthropic relationships and community partnerships, while technical financial oversight will remain anchored by the Finance Committee and board members with direct fiscal-management expertise.
- **Holt Madden**, Office Leasing at Boyle Investment Company, adds commercial real estate expertise that will strengthen the board's oversight of facilities strategy, site selection, lease analysis, market conditions, and long-term facility planning. His experience will be especially valuable as The Gate School evaluates facility options, negotiates space needs, and ensures that real estate decisions remain financially sustainable and aligned with the school's growth plan.

The Finance Committee, chaired by John Webb, will:

- Review and recommend the annual budget for board approval.
- Monitor monthly financial statements and cash-flow projections.
- Ensure internal controls, separation of duties, and adherence to state and federal reporting requirements.
- Oversee annual independent audits and long-term financial planning aligned with the school's sustainability goals.

Community Engagement

Community engagement oversight will be guided by Viva Price and Andrea Kinzer, both highly connected to Nashville's families and civic networks:

- **Viva Price** leads **Youth Encouragement Services**, serving hundreds of Nashville youth, and holds leadership roles in the **Mosaic Fellowship**, **CNM Board of Directors**, and **Vanderbilt Community Engagement Forum**.
- **Andrea Kinzer**, a Nashville native and president of the **Haynes-Trinity Neighborhood Coalition**, brings experience organizing neighborhood partnerships, faith-based outreach, and family-support initiatives.

- **Cate Fair,** a Nashville native adds valuable civic and philanthropic perspective, strengthening the board's ability to build community trust, cultivate local partnerships, and connect The Gate School with Nashville leaders committed to expanding educational opportunity.
- **Holt Madden** will also contribute knowledge of the local real estate and business community, strengthening the board's ability to build relationships with potential facility partners and civic stakeholders.

The board will:

- Maintain transparent communication through public board meetings, annual reports, and a family feedback portal.
- Convene Family Advisory Councils twice annually to inform decision-making.
- Review community feedback and engagement metrics quarterly to ensure responsiveness and trust.

Collectively, The Gate School's founding board provides balanced expertise in education, governance, finance, community leadership, civic partnership, and philanthropic sustainability. Through structured committees, clear accountability systems, and consistent data reviews, the board will ensure The Gate School remains mission-aligned, academically excellent, fiscally sound, and deeply connected to the families, partners, and communities it serves.

Gaps and Future Recruitment

Our current board is strong in school design, finance, and community engagement. As The Gate School moves toward launch, we will thoughtfully expand membership to strengthen the board's long-term capacity and ensure alignment with the school's innovative instructional model. We plan to add Legal and compliance expertise, AI and technology expertise, a Parent Board Member[81] and Local business representation. Additional detail is included in Question 35.

Question 35: Explain the process by which board members have been and will be selected, including the criteria that have been and will be used to evaluate potential board members. Identify any gaps in the current governing board and describe plans to fill those gaps with future recruitment efforts.

Our Approach to Board Building

From the start, The Gate School has approached board formation the same way we approach building our school, with **purpose, alignment, and people at the center.** We are not assembling a board simply to check boxes; we are building a governing board that reflects the values and design of our school. Each founding member was chosen because they bring both professional expertise and a lived connection to our mission and model.

We began with people who understand what it means to design, lead, and sustain an innovative school model.

- **Todd Dickson**, founder of Valor Collegiate Academies, brings extensive experience in building high-performing public schools from the ground up. His leadership in strategy, governance,

[81] TCA §49-13-109

and culture development ensures that The Gate School grows wisely and remains mission-focused at every stage.

- **Demetria Giles,** through her work with the Nashville Teacher Residency (NTR) and Ember Charter Schools, offers deep expertise in teacher preparation, instructional coaching, and leadership development within the Teaching Firm model, the strategic staffing approach The Gate School is adapting to elevate and sustain great teaching.
- **Viva Price** brings more than a decade of experience in nonprofit management and community partnerships, leading Youth Encouragement Services (YES) and collaborating with citywide coalitions to expand opportunities for Nashville youth and families.
- **Andrea Kinzer** combines nine years of successful classroom teaching with deep roots in local service and advocacy. A former award-winning educator and community leader, she brings firsthand knowledge of what students and families need most and continues to strengthen partnerships that connect schools, neighborhoods, and opportunity.
- **John Webb**, Vice President at Pinnacle Asset Management, contributes significant expertise in financial stewardship and long-term fiscal planning, ensuring that the board maintains strong oversight, stability, and sustainability as the school grows.

This approach ensures that board recruitment is guided by clear selection criteria, targeted recruitment priorities, formal approval steps, and ongoing evaluation of gaps in expertise as the school moves toward launch.

Board Member Selection Process

The board uses a clear and transparent process that prioritizes mission fit and model alignment above all else. Here is a look at our structure below:

- **Identify & Nominate:** Candidates are recommended and identified through personal and professional networks. We intentionally seek people who share our belief in teacher-led schools, student agency, and community partnership.
- **Vetting & Interview:** The Governance Committee meets with potential members to learn more about their connection to our mission, their experience in one or more of the board's four key oversight areas (governance, academics, finance, and community), and how they model our core commitments. This will also include a school visit and a meeting with the school leader to discuss the school model.
- **Approval & Onboarding:** Finalists are approved by a majority board vote. New members receive an onboarding packet that includes our charter, governance policies, and an introduction to TGS Model.
- **Ongoing Development:** Each year, the board participates in governance and mission-specific training through partners such as the Tennessee Charter School Center and BoardSource.

Board Member Selection Criteria

We evaluate potential members on the following:

- Alignment with our vision of redefining what great teaching looks like in public education.
- Expertise in one or more strategic areas (education, finance, operations, law, communications, or community engagement).
- Commitment to Nashville's students and families.
- Diversity of background and thought that reflects our city and enriches decision-making.

- Proven ability to hold a high bar for excellence while leading with humility and care.

Board Training and Development

All members of The Gate School's founding board will complete the state required[82] New Start Charter Board Training, a comprehensive governance module developed collaboratively by the Nashville Incubator and the Tennessee Charter School Center. This training equips board members with the knowledge and skills required to provide effective oversight in academic, financial, and organizational performance, while ensuring full compliance with Tennessee charter school laws and accountability standards. Completion of this module will prepare board members to govern with clarity, confidence, and a shared understanding of their responsibilities as the school launches and grows.

Gaps and Future Recruitment

Our current board is strong in school design, finance, and community engagement. As The Gate School moves toward launch, we will thoughtfully expand membership to strengthen the board's long-term capacity and ensure alignment with the school's innovative instructional model.

We plan to add:

- **Legal and compliance expertise** to provide guidance on policy development, contracting, and charter renewal, ensuring the board remains proactive and compliant as the school scales.
- **AI and technology expertise** to support the school's responsible and effective integration of artificial intelligence and digital learning tools, helping the board steward innovation with equity, ethics, and educational impact in mind.
- **Parent Board Member**[83] to comply with state standards, but also to include family voice as it is central to our mission. The parent board member will be identified within the first 6 months of operation.
- **Local business representation** to deepen the board's connection to the community to ensure that local partnerships are embedded in our school's culture and decision-making.

Future Recruitment

This next phase of board growth will focus on attracting leaders who can expand the board's expertise in law, technology, and community partnership and are individuals who bring both technical skill and a deep commitment to public education in Nashville. By broadening the board's perspective in these key areas, The Gate School will strengthen its capacity to govern responsibly, innovate thoughtfully, and stay closely connected to the community it serves.

Recruitment for these roles will begin in Spring 2026 through targeted outreach across Nashville's civic, educational, and professional networks. The board will engage with organizations such as the Nashville Chamber of Commerce, Young Leaders Council, Rotary Nashville, and local partners advancing AI innovation and workforce development.

[82] TCA § 49-13-111
[83] TCA § 49-13-109

OPERATIONS PLAN & CAPACITY

Governance

Question 36: Describe powers and duties of the board, specifically describing the board's role in academics, operations, and finance.

The Gate School Board of Directors are responsible for ensuring the academic, operational, and financial success of the school in alignment with our mission and student needs. The Board governs in accordance with Tennessee Code Annotated § 49-13-101 et seq., the school's bylaws, and all applicable federal, state, and local requirements. The Board exercises its authority collectively and focuses on high-level strategy, oversight, and accountability, while delegating day-to-day management to the Executive Partner (similar to an Executive Director) and school leadership. This separation between governance and management ensures that the Board maintains oversight without interfering in daily school operations.

Board Powers

Per the bylaws (Attachment 7), the Board's primary duties include:

- Setting and safeguarding the mission, vision, and strategic direction of the school
- Establishing and adopting school-wide policies
- Approving the annual budget and major contracts
- Ensuring financial sustainability and sound fiscal management
- Monitoring academic, operational, and financial performance against goals outlined in the charter and authorizer requirements
- Hiring, supporting, and annually evaluating the Executive Partner
- Ensuring compliance with all applicable laws, charter requirements, and the Tennessee Open Meetings and Public Records Acts

To carry out its oversight responsibilities, the Board operates through standing committees including Finance, Academic Excellence, Governance, and Development. Committees conduct detailed work within their focus areas and bring recommendations to the full Board, which retains final decision-making authority. Additional committee detail can be found in Question 39.

Officer Roles:

The bylaws require the Board have the following officer roles:

- **Chair:** The Chair will preside at all meetings of the Board; appoint committee chairs (unless otherwise specified by the bylaws), and execute any other duties as assigned by the bylaws.
- **Vice Chair:** The Vice Chair will stand ready to act as the Chair in the Chair's absence and perform any duties of the Chair as delegated by the Chair.
- **Secretary:** The Secretary will keep minutes, maintain and protect Board files and documents, and perform any other responsibilities as assigned by the bylaws.
- **Treasurer:** The Treasurer will oversee the budget, keep full and accurate accounts of all receipts and disbursements; maintain an inventory of assets and record of liabilities, deposit money and all other securities, disperse funds, prepare statements and reports, and fulfill any other duties as outlined by the bylaws.

Representation of Key Stakeholders:

The Board will ensure active and effective representation of key stakeholders through the following:

- **Ex-Officio Representation:** The Executive Partner will serve on the Board as an ex-officio, non-voting member, ensuring representation of school staff and students.
- **Parent Representation:** As required by Tennessee Code, we will appoint a parent whose child is enrolled in our school to the Board within six months of the school's opening.
- **Public Representation:** We will comply with all requirements of the Tennessee Open Meetings Act, including ensuring that all Board meetings are open to the public and encouraging stakeholders and community members to attend. We will post Board meeting dates, agendas, and minutes on our website, as well as publish our bylaws and policies on our site. All posted materials will also be available in the languages spoken by the families our school serves. Stakeholders may request hard copies of public Board artifacts. Additionally, time for public comment will be a standing item on Board meeting agendas.

Board members annually sign conflict-of-interest disclosures and follow the board's ethics policy.

Board's Role in Academics, Operations, and Finance

The Board is composed of individuals with expertise in education, finance, law, and governance enabling effective oversight across academic, operational, and financial domains. The Gate School's Board of Directors will ensure ongoing compliance with the authorizer by engaging proactively in all required reporting and accountability processes (i.e. interim, renewal, audits).

Oversight & Responsibilities

Academic	Operations	Finance
The Board ensures the school meets the student achievement goals outlined in the charter agreement.	The Board provides oversight of organizational effectiveness, school culture, and legal compliance.	The Board oversees the financial health and long-term sustainability of the organization.
● Reviews student achievement and growth data at least quarterly, disaggregated by grade level, cohort, and subgroup ● Monitors progress toward the school's academic goals, including state performance benchmarks and mission-specific indicators ● Oversees fidelity to the academic model and	● Monitoring enrollment trends, attendance, retention, and student culture indicators, including behavioral data ● Reviewing staffing updates and ensuring staffing structures support strong instruction and operations ● Approving key school policies (e.g., safety, discipline, grievance, health, technology) ● Ensuring compliance with MNPS authorizer requirements, site visit	● Approving the annual budget aligned to strategic priorities, and contracts ● Reviewing monthly financial statements, cash flow, revenue projections, and budget-to-actual variances ● Overseeing financial controls and policies that ensure strong stewardship of public funds ● Selecting and working with the external auditor, reviewing audit results, and

alignment with curriculum, assessment, and instructional frameworks ● Evaluates the Executive Partner in part on academic performance and instructional leadership ● Partners with the **Academic Excellence Committee** to analyze data, identify trends, and elevate findings and recommendations to the full Board	protocols, required reporting, and state/federal regulations ● Overseeing risk management, facilities planning, and major operational decisions ● Receiving updates through the Executive Partner and relevant committees, while respecting management autonomy ● The Board's **Governance Committee** oversees the board's own effectiveness, training, member recruitment, and succession planning, ensuring continued operational stability	ensuring timely resolution of any findings ● Monitoring enrollment-based funding levels and assessing their impact on financial sustainability ● Reviewing long-term financial plans, major contracts, and facility-related commitments ● The **Finance Committee**, chaired by the Treasurer, conducts detailed financial reviews and brings recommendations to the full Board

The Board hires, evaluates, supports, and, if necessary, terminates the Executive Partner. The Governance Board facilitates a formal evaluation each year of the Executive Partner (see question 38 for more detail). The comprehensive evaluation includes:

- Executive Partner Self-Evaluation
- Charter Promises/Performance Metrics
    - State tests, growth, and compare to neighborhood schools
- Satisfaction Surveys - Staff, Parents, Board
- Financial/Operational Reports

Question 37: Describe plans to add a parent representative to the board within six months of the school's opening pursuant to T.C.A. § 49-13-109. Detail the process for recruitment, selection, and onboarding of the parent representative.

In accordance with T.C.A. § 49-13-109 and our core value of collaboration, The Gate School will appoint a parent representative whose child is currently enrolled within six months of opening. The plan below outlines how we will ensure a clear, inclusive, and transparent process for recruitment, selection, and onboarding.

Recruitment (July-October 2027)

To ensure all families are aware of the opportunity to serve on the board we will broadly advertise using our communication platforms (social media, newsletters, text) and embed in our family orientation events. In addition to this "all call"- we will ask for nominations from families, staff, and the board. To ensure equitable participation, the school will provide translated materials, personally encourage families historically underrepresented, and ensure that

nomination forms are accessible online and in paper. These strategies are designed to ensure that a diverse range of parents are aware of and able to engage in the opportunity.

Selection (October- November 2027)

- **By October 15th, 2027:** Interested parents/guardians will submit (in paper or online) a brief statement of interest, a description of aligned personal or professional experiences, and a confirmation of their child's enrollment.
- **By November 1st, 2027:** The governance committee will review all interested applicants using a transparent rubric and narrow down to 3 finalists.
- **By November 15th, 2027:** The governance committee will conduct 30-minute structured interviews with each finalist. Interviews will be scored using a rubric assessing:
    - commitment to the mission,
    - capacity to meet governance expectations, and
    - perspectives and experiences that strengthen the existing board.
- **By November 30th, 2027:** The governance committee will recommend a finalist for a full board vote, ensuring appointment within 6 months of opening as required by state law.

Onboarding (December 2027-January 2028)

The Gate School parent representative of the board adds an essential perspective and we will ensure they feel welcomed and supported as a member of the team.

- Each board member will meet 1:1 with them in the first 30 days to build relationships
- The Board Chair will share an onboarding packet including the budget, goals, accountability metrics, bylaws, conflict-of-interest policy, and authorizer expectations
- Completion of two introductory virtual board training sessions specific to new start charters using the materials created by Nashville Incubator and Tennessee Public Charter School Center.
- Regular 1:1 check-ins during the first 90 days with the board chair to answer questions and ensure a seamless transition into governance.

Question 38: Explain how the board will interact with the school leader, including how the board will support, develop, and evaluate the school leader each year. Include, as **Attachment 4**, an organization chart that shows the relationship among the school's governing board, management, and leadership in:

- Year 1; and
- At full capacity

Note the organization chart should clearly delineate the roles, responsibilities, and lines of authority and reporting among the governing board, school leadership, any related bodies (such as advisory bodies or parent/ teacher councils), and any external organizations that will play a role in managing the school and how these roles and responsibilities will evolve between Year 1 and full capacity.

The governing board will provide strategic oversight while empowering the Executive Partner to successfully manage day-to-day operations. The board will support the school leader by:

Support	Execution

Consistent Communication & Collaboration	● Creates an organization decision chart to clarify clear roles and responsibilities between the board and Executive partner (e.g. EP gives input, but board approves annual budget). This streamlines who does what, when, preventing micromanagement or decision paralysis. ● Monthly board meetings include the Executive Partner as an ex officio member to review progress, discuss challenges, and provide guidance, as applicable. ● Agenda Prep: Executive Partner and Board Chair collaborate at least one week prior to each monthly board meeting to finalize topics. ● Bi-weekly check-ins between the Board Chair and Executive Partner to address strategic priorities and provide mentorship. ● The Executive Partner participates in committee meetings (Finance, Academic Excellence, Governance) as appropriate to ensure alignment and transparency. ● Collaborating with the school leader on key strategic decisions, such as budget approval, policy adoption, and long-term planning, while respecting operational autonomy.
Professional Development	● Providing access to leadership training, conferences, and relevant professional networks. ● Encouraging participation in state-sponsored charter leadership training. ● Offering coaching or advisory support to strengthen instructional and operational leadership skills aligned to needs.
Evaluation	**Ongoing:** The board reviews the success of the school and the leader through data reviewed during the monthly meeting cadence. Data supports the academic, operations, culture, and financial snapshots of data. While data will be reviewed as a part of committee meetings, committees may share a synopsis of information out during the monthly Board Meeting or bring details up for further discussion. **Below is an overview of sample data that will be discussed:** ● **Academics:** This is to ensure that the school is an academic success and on track to meet the full vision of the school. Data includes annual performance goals, student growth and achievement data, classroom grades, educator effectiveness. ● **Financial:** This is to ensure that the school is in good fiscal health. Data includes strategic priorities and budget needs, selection of auditor and review of the annual audit, cash on hand, enrollment variances, operating margins, unrestricted fund balance, unrestricted net assets and debit, budget variances. Data as discussed during finance may also include building out a fundraising and development strategy. ● **Operational and Cultural:** This is to ensure that the school is an effective organization. Attendance, disciplinary actions, survey data (staff, students, parents), and enrollment data.
	Annual Formal Evaluation: (March-June)

	The Board of Directors will assess the Executive Partner through a comprehensive annual evaluation *(see proposed rubric format below)* including: ● Self-Evaluation ● Charter Promises/Performance Metrics - State tests, growth, and compare to neighborhood schools ● Satisfaction Surveys - Staff, Parents, Board ● Financial/Operational Reports The Evaluation Committee then drafts a formal confidential memo summarizing: ● Key achievements (e.g., improved test scores, successful fundraising). ● Areas for improvement (communication, leadership, operational strategies). ● Specific goals or action items for the coming year. After internal review, the full board typically adopts or modifies the memo via a formal vote or consensus.

Executive Partner Evaluation
Adapted from New Start Charter Board Training[84] 1. **Rating Scale**: Use a **1–5** scale (or another preferred method) to score each criterion. ○ **1** = Unsatisfactory ○ **2** = Needs Improvement ○ **3** = Meets Expectations ○ **4** = Exceeds Expectations ○ **5** = Outstanding 2. **Comments**: Provide specific examples or context for each category to support the rating. 3. **Overall Synthesis**: Summarize strengths, areas for improvement, and next steps.

Part 1: Leadership and Organizational Culture	
Criterion	**Rating**
1. Mission & Vision Alignment: Guides the school in accordance with its charter, ensuring all programs and decisions reflect the school's mission.	
2. Team Leadership & Development: Cultivates a positive, collaborative environment; invests in staff growth and leadership capacity.	
3. Decision-Making & Problem-Solving: Makes informed, timely decisions; involves relevant stakeholders; resolves conflicts effectively.	
4. Communication & Transparency: Maintains clear communication channels with the board, staff, families, and the community.	
Average Rating (Leadership)	

Part II: Academic/Program Outcomes	
Criterion	**Rating**

[84] TN New Starter Charter Board Training

1. Student Achievement: Progress toward charter performance metrics.	
2. Program Quality & Innovation: Implementation of effective curriculum, instructional strategies, and support services.	
3. Equity & Inclusion: Efforts to address achievement gaps, serve diverse learners, and foster inclusive practices.	
4. Monitoring & Reporting: Provides timely, accurate data on academic performance and progress to the board.	
Average Rating (Academics)	

Part III: Financial & Operational Management	
Criterion	**Rating**
1. Budget Management: Develops and manages budgets effectively; maintains financial stability and compliance.	
2. Resource Allocation: Allocates funds, staff, and materials in alignment with strategic priorities.	
3. Compliance & Risk Management: Ensures adherence to authorizer requirements, state/federal laws, and internal policies.	
4. Facility & Operations: Oversees building maintenance, safety, technology, and day-to-day operational logistics.	
Average Rating (Finance & Operations)	

Part IV: Stakeholder Engagement & Community Relations	
Criterion	**Rating**
1. Family & Community Outreach: Builds partnerships with parents, local businesses, and community groups	
2. Board Collaboration: Communicates proactively with the board; provides data, analysis, and recommendations for informed governance.	
3. Volunteer & Donor Engagement: Encourages community volunteerism; assists with fundraising and resource development.	
4. Reputation & Advocacy: Positions the school positively within the broader educational landscape.	
Average Rating (Stakeholder Engagements)	

Part V: Overall Performance & Future Goals	
Criterion	**Rating**
1. Overall Effectiveness: Combines all performance areas into a single, holistic evaluation.	
2. Goal Achievement: Progress on specific, measurable goals set during the previous evaluation cycle.	
3. Professional Growth: Indicates efforts toward self-improvement (workshops, trainings, leadership coaching).	
Average Rating (Stakeholder Engagements)	

Part VI: Summary & Next Steps

<table>
<tr><td>Strengths</td><td>List 2–3 major accomplishments or leadership qualities.
1.
2.
3.</td></tr>
<tr><td>Areas for Improvement</td><td>List 2–3 skills, competencies, or results needing attention.
●
●
●</td></tr>
<tr><td>Recommended Action Items / Goals for Next Year</td><td>Describe the objective and measurable outcome.
Goal 1:
Goal 2:
Goal 3:</td></tr>
<tr><td>Projected Timeline</td><td>e.g., “Check progress quarterly; finalize results by June.”</td></tr>
<tr><td>Final Rating & Board Approval</td><td><table><tr><th>Final Evaluation Outcome</th><th>Board Chair Signature</th><th>Date</th></tr><tr><td></td><td></td><td></td></tr></table></td></tr>
<tr><td>Additional Comments</td><td></td></tr>
</table>

Organization Charts:

Please review **Attachment 4.**

- **Year 1:** Shows the school leader reporting directly to the board, with leadership team and key staff positions beneath the school leader.
- **Full Capacity:** Illustrates expanded leadership and management roles, with departments or grade-level leads reporting to the school leader, who continues to report to the board.

This structure ensures clear accountability, ongoing support, and continuous professional growth for the school leader while maintaining the board’s oversight responsibilities.

Question 39: Describe the board’s policies related to:

- Planned meeting frequency;
- Committee or advisory board structure(s);
- Ethical standards and procedures for identifying and addressing conflicts of interest; and
- Hearing and addressing complaints.

Planned Meeting Frequency

The Board meets monthly during the planning year and first operational year, and no fewer than six times annually thereafter. The Board also holds an annual retreat focused on strategic planning, board training, and evaluation.

All meetings will comply with the Tennessee Open Meetings Act. Meeting dates, times, locations, and agendas will be posted on the school’s website at least five days in advance and made

available in the languages most commonly spoken by families. Minutes will be approved by the Board and posted publicly within five business days of approval.

Committee and Advisory Structure

The Gate School's bylaws (**Attachment 7**) establish an Executive Committee, composed of Board officers (Chair, Vice Chair, Secretary, Treasurer and, ex officio, the Head of School), and authorize the Board to create standing and ad hoc committees to support effective governance.

Standing committees:

- **Finance Committee:** Oversees financial health, budgets, internal controls, audits, and financial reporting to the full Board.
- **Academic Excellence Committee:** Monitors student performance, academic programming, and alignment to the charter's goals and accountability metrics.
- **Governance Committee:** Leads Board member recruitment, training, evaluation, and succession planning, including the recruitment and onboarding of the required parent representative.
- **Development Committee:** Supports fundraising, partnership development, and community engagement.
- **Ad hoc:** As permitted in the bylaws, the Board may establish ad hoc committees to address discrete, time bound needs (e.g., facility planning, charter renewal preparation). All committees report back to the full Board, which retains final decision-making authority.

Ethical Standards and Conflict-of-Interest Procedures

The Gate School's bylaws establish a Code of Ethics that requires Directors to act at all times in the best interest of the school, uphold fiduciary responsibilities, maintain confidentiality, and avoid any real or perceived conflicts of interest.

Consistent with T.C.A. § 49-13-111, the Board maintains a robust conflict-of-interest and nepotism policy, which includes the following requirements:

- Trustees must fully disclose any actual or potential conflict of interest, including financial, contractual, employment-related, or familial relationships connected to matters before the Board.
- A conflicted Trustee must recuse themselves from discussion and abstain from voting on the related matter.
- Trustees must complete an annual written disclosure statement identifying any relationships or circumstances that may present a conflict and must update the Board when conflicts arise during the year.
- The Board prohibits self-dealing, excess benefit transactions, and any use of confidential information for personal gain.
- Alleged violations of the Code of Ethics or conflict-of-interest policy will be reviewed by the Executive Committee, which may recommend corrective action or removal consistent with the bylaws.

Hearing and Addressing Complaints

The Gate School is committed to providing students, families, and staff with a clear, fair, and accessible process for raising and resolving concerns. The Board will adopt and oversee a formal Grievance and Complaint Policy that aligns with Tennessee law, MNPS policy, and the school's bylaws.

Informal Resolution
Stakeholders are encouraged to first address concerns directly with the staff member or school leader closest to the issue. Most concerns can be resolved at the school level through timely communication and collaboration.
Formal School-Level Complaint
If a concern is not resolved informally, a stakeholder may submit a written complaint to the Executive Partner. Complaints may be submitted by email, on the school's website, in person, or on a paper form available in the school office. All materials will be available in families' home languages. **The school leader will:** ● Acknowledge receipt within three business days, ● Investigate the matter, and ● Provide a written response within ten business days.
Board Review
If the concern remains unresolved or if the complaint involves the Executive Partner, a stakeholder may submit a written complaint to the Board Chair. The Board (or a designated committee) will review the matter in accordance with Open Meetings Act requirements and issue a written response within fifteen business days. The Board hears complaints only after all school-level steps have been completed, except where otherwise required by law (e.g., allegations involving the Executive Partner).

Question 40: Provide the following attachments:

- **Attachment 5:** Articles of Incorporation
- **Attachment 6:** Proof of nonprofit* and tax-exempt status
- **Attachment 7:** Governing board bylaws

**If a sponsor has applied for nonprofit status and not yet received approval, the sponsor should submit evidence of the application and describe the steps that have been taken. As required in state law, a charter shall not be granted to a for-profit corporation. Proof of nonprofit status must be provided in order to be recommend and approved by the authorizer.*

- **Attachment 5:** Articles of Incorporation
- **Attachment 6:** Proof of nonprofit* and tax-exempt status
- **Attachment 7:** Governing board bylaws

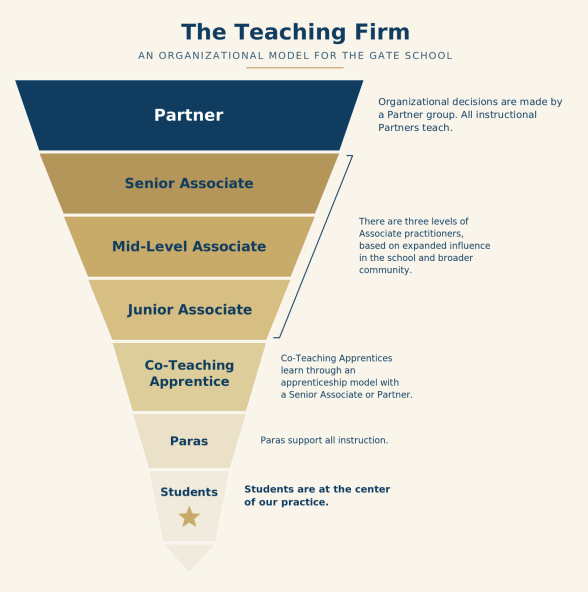
Staffing

Question 41: Describe the school's leadership and staffing structure.

At the Gate School, we believe that teaching is the strongest in-school driver of student outcomes. Thus, our adult roles, leadership structures, and coaching systems are intentionally designed to make our teachers feel empowered as they have the greatest impact on students. At TGS we have adapted the Teaching Firm model, which believes that: if teaching quality is the primary driver of student outcomes, then organizational structure should be designed to intentionally attract, develop, retain, and leverage excellent teachers over time.

The Teaching Firm Model

The Teaching Firm replaces isolated classrooms with collaborative teaching practices. Educators operate like a professional firm—developing expertise, apprenticing new staff, and sharing responsibility for all students. This creates a culture of excellence, growth, and collective efficacy.



At The Gate School, in order to achieve this vision, we will use a strategic staffing structure inspired by Ember Charter School's Teaching Firm, which itself draws from the leadership structure of major law firms. The Teaching Firm organizes educators into clearly defined, collaborative roles, creating shared ownership, professional growth pathways, and distributed decision-making.

Instead of isolated classrooms where one teacher is solely responsible for instruction, The Gate School's model forms professional teaching teams that work together daily. This ensures additional personalization for students and continued development for teachers so everyone is growing towards the highest achievement levels.

Student Personalization	Teacher Development
• Every student is known deeply by multiple adults through a layered model approach which increases the number of daily touchpoints each student receives • Daily small-group instruction and intervention blocks • Real-time coaching and co-teaching support • Targeted push-in and pull-out supports by CTAs and Paras	• Teachers receive ongoing support instead of working alone • Leadership stays connected to classroom practice • New educators are "sheltered and developed" rather than thrown into full responsibility on day one

The Gate School Structure

At The Gate School, we are building a strategic staffing approach that elevates instruction, strengthens adult collaboration, and improves student outcomes, with key indicators adopted from the Teaching Firm Model. Our organizational structure is intentionally student-centered and continuously professionalizes teaching.

This means placing instruction at the core, ensuring every role aligns to teaching and learning. Our model has been built to:

1. Center teaching as the most important work in the school
2. Replace teacher isolation with shared responsibility
3. Create roles where authority, responsibility, and instructional credibility are aligned
4. Accelerate learning for both students and adults
5. Build a culture where excellence is normal and repeatable

Below is an overview of our structure. In the next sections we will discuss pieces of the structure and how it works within the Gate School Model.

Partners

The organizational model is fairly flat with three partners collaboratively leading specific buckets of work for The Gate School:

Partner 1: Executive Partner

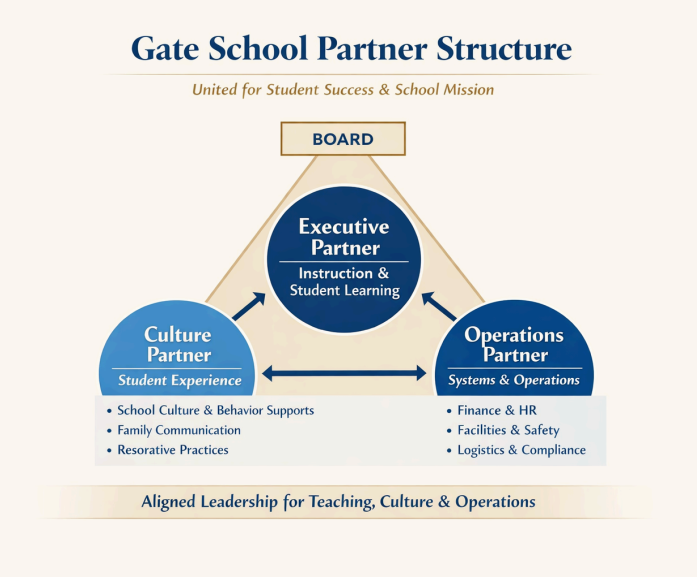
- Serves as both the school's master instructional leader and its main school leader.
- Is ultimately held accountable to the Board for academic outcomes, instructional quality, and fidelity to the school's mission.
- Teaches daily to stay grounded in classroom practice, model high-quality instruction, and ensure that schoolwide priorities translate into strong, consistent daily teaching.
- Leads curriculum decisions, coaches Associates, directs data cycles, and facilitates shared decision-making within the Teaching Firm.
- Is the anchor for instruction and the primary steward of student learning outcomes.

Partner 2: Operations Partner

- Leads all non-instructional functions such as finance, HR, compliance, logistics, procurement, facilities, safety, and systems design.
- Collaborates closely with all Partners to ensure operational decisions support teaching and learning.

Partner 3: Culture Partner

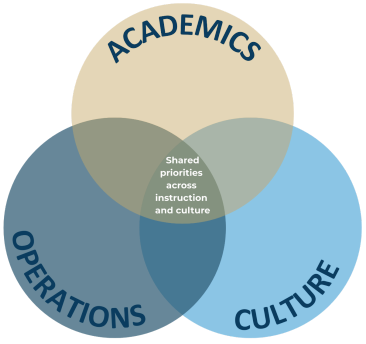
- Oversees all systems and ensures students experience a safe, supportive, and structured learning environment aligned with the Gate School's values.
- Ensures interventions, restorative practices, and family communication are aligned with the school's academic goals.
- By collaborating closely with the Executive Partner, they help create a unified approach where culture, instruction, and student development reinforce one another and every student is known, supported, and set up for success.



	Primary Focus	Key Responsibilities
Executive Partner	Instruction, Teaching & Learning	Master instructional leader; teaches daily; curriculum leadership; coaching associates; data cycles; academic outcomes; shared decision-making
Culture Partner	Culture, Family Engagement, Student Support	Behavioral systems; restorative practices; family communication; student support alignment; collaborates with Executive Partner on unified culture-instruction vision
Operations Partner	Non-instructional operations	Finance, HR, compliance, logistics, procurement, safety, facilities, systems design; ensures operations support instruction

Alignment Between Academics, Culture, and Operations

In order for the model to be fully supported we must ensure that The Gate School's structure intentionally aligns the partners of the organization together through the unifying priorities across instruction and culture. By identifying how the partner priorities and positions work together, we will be able to fulfill the goal of the model and the mission and vision of The Gate School.



Academics + Culture Alignment

- Culture Partner collaborates directly with Executive Partner.
- Shared priorities across instruction and culture.
- Academic goals drive culture routines and student support decisions.

Academics + Operations Alignment

- Operations Partner ensures logistical decisions reinforce instructional priorities.
- Schedules, materials, space use, and compliance all center teaching and learning.

Culture + Operations Alignment

- Unified systems for student movement, safety, transitions, and family communication.

Together, all Partners form a cohesive leadership team that anchors the school in a unified vision.

After our partners, there are two main components of our staffing structure: Operations and Instruction.

Operations

The Operations Team and Instructional Teams are separate but aligned branches. The Operations team handles all non-instructional responsibilities, operations, logistics, compliance, and HR, so the instructional team stays focused on instruction and student development. They collaborate closely with Partners to ensure operational decisions support teaching and learning and ensure the school functions operationally. This is also the only team that does not participate in daily teaching.

Role	Year Hired	Core Responsibilities	Notes / Rationale
Operational Partner	Year 0	• Monitor and ensure fidelity of non-instructional systems (finance, HR setup, compliance, transportation, food service, safety). • Procure and secure all vendors through RFP and contract process (IT, food service, janitorial, transportation). • Co-Leads facility acquisition, construction timeline, and readiness. • Builds and monitors operational budget with Vertex Education (formerly EdTec). • Ensures alignment between operations and instructional priorities. • Builds and monitors dashboard for key school operational and financial goals	Anchor of operations from Y0 forward; only role spanning all years.
Director of Ops.	Year 1	• Oversees all non-instructional systems (finance, HR setup, compliance, transportation, food service, safety). • Manages vendor RFPs and contracts (IT, food service, janitorial, transportation). • Manages all day-to-day facility needs, arrival and dismissal • Manages all school safety drills in compliance with State of TN and local metro policies • Ensure teachers have all things they need operationally to perform their duties effectively	Dedicated on-site operations lead responsible for daily execution and compliance in Year 1.

		• Manages all state grants through Eplan, title 1 and IDEA reimbursements • All local and state compliance requirements	
Front Office Coordinator	Year 1	• Main point of contact for families; manages communication and enrollment paperwork. • Oversees daily attendance, visitor management, and front-desk systems. • Supports scheduling, data entry, and compliance reporting. • Provides administrative support to Culture Partner and Executive Partner.	Provides foundational school-based operational capacity.
Director of Talent & Enrollment	Year 3	• Manages hiring pipelines, onboarding, contracts, and personnel files • Manages benefits, compliance, and payroll coordination with Vertex Education (formerly EdTec). • Supports staff culture, retention efforts, and annual evaluations. • Ensures licensure and certification compliance.	Added as the organization scales and staffing complexity grows.
Nurse	Year 3	• Provides daily health support and medication administration. • Manages health records, immunizations, and parent communication. • Leads emergency response training and health-related compliance. • Works with Culture Partner to support student wellness plans.	Needed once enrollment reaches 300+ and student health needs expand.

Instruction

The Instructional Team is the heart of our school and is structured differently than most organizations using the Teaching Firm Model. The Gate School's instructional team includes all academics, student supports, and culture.

Instructional Team Roles, Responsibilities, and Structures

Although the Culture Partner is part of the leadership team, this role sits within the Instructional branch because culture, student development, and restorative practices are inseparable from teaching and learning at The Gate School. It's imperative for our Culture Partner and team to also support excellent instruction.

Instructional Team Roles and Responsibilities	
Executive Partner	• Model excellent instruction by teaching daily • Coach and mentor Senior Associates in Year 1 and 2 • Coach and mentor a caseload of teachers, as assigned, yearly • Lead planning and professional learning • Contribute to strategic decision-making

	• Ensuring alignment between daily practice and the school's broader academic and cultural vision.
Culture Partner	• Lead schoolwide culture, behavior systems, and student experience • Coach and mentor a caseload of teachers that need specific support with culture • Design and oversee routines, transitions, restorative practices, and schoolwide expectations • Support teachers in building strong classroom culture and consistent routines • Partner with the Executive Partner to ensure culture reinforces academic goals • Lead family communication and engagement related to attendance, behavior, and supports • Monitor culture data (behavior trends, attendance, engagement) to drive improvements
Student Supports Partner (Year 3)	*In Years 1 and 2, student supports are led by a Senior Associate with specialized expertise, whose responsibilities in Year 3 transition into a dedicated Student Supports Partner role as enrollment and complexity increase.
	• Lead MTSS systems, including RTI academic and behavioral intervention structures • Oversee all special populations (SPED, EL, 504, and at-risk students) • Ensure compliance with IDEA, Section 504, Title III, and state requirements • Coach special education, ESL, and intervention personnel • Coordinate student support plans and progress-monitoring cycles • Analyze academic, behavioral, and language-acquisition data to adjust supports
Instructional Partner (Year 3)	*In Years 1 and 2, the Executive Partner takes on some of the duties assigned to the Instructional Partner to ensure that the mission and instructional frameworks are met and aligned with school goals.
	• Lead curriculum implementation and continuous improvement across all content areas • Oversee assessment systems, grading practices, and academic pacing • Coach 4 Senior Associate Teachers with a focus on rigor, planning, and data use • Strengthen academic coherence across grades and subjects • Support acceleration pathways and enrichment for advanced learners • Partner with the Executive Partner to maintain strong instruction schoolwide
Senior Associates	• Teach 4 blocks daily (3 core blocks, and 1 intervention/acceleration block) • Engage in planning, modeling, coaching meetings, and observation blocks 3 blocks daily • Coach 4 teachers, including associates (Mid, Junior), apprentices, and paraprofessionals
Associate Teachers (Junior, Mid)	• Teach daily as lead instructors • Collaborate and Coach with Co-Teaching apprentices (Senior) • Advance through growth pathways tied to impact, leadership, and compensation
Co-Teaching Apprentices	• Work alongside either a Partner or Senior Associate to deliver daily instruction while developing skill

	• Gradually assume more teaching responsibility • Learn through modeling and co-teaching
Para	• Assist with differentiated instruction, small-group learning, and student support • Do not lead whole group instruction.

As discussed in the Organizational Chart, in **Attachment 4**, each level of the instructional team is student-facing each day. The model is intentionally layered and time is diligently protected to ensure collaboration. Each grade-band at The Gate School functions like its own "practice" with different allotments of time spent in different areas. Here are some key pillars to time allocation:

- Teaching load decreases as leadership responsibility increases (i.e. Co-Teaching Apprentice → Partner).
- Coaching responsibility increases only at the Senior Associate and Partner levels.
- Facilitation duties increase sharply at Senior Associate and peak at Partner.
- Participation and learning time is highest for Co-Teaching Apprentices, moderate for Associates, strategic time held for Partners.

(Sample) Time Allocation						
	Role					
Task	Partner	Senior Associate	Mid Associate	Junior Associate	Co-Teaching Apprentice	Paras
Teaching + Planning	20-25%	60-65%	75-80%	85-90%	100%[85]	100%[86]
Coaching + Mentoring	25-30%	15%	10%	<5%	0%	0%
Professional Development Facilitation	15-20%	10-15%	5-10%	0%	0%	0%
Executive Functions	25%	0%	0%	0%	0%	0%

Example Staff Schedules

SAMPLE: Schedule by Staff Type[87]					
Time	Instructional Partner Schedule	Senior Associate	Mid-Associate	Junior Associate	Co-Teaching Apprentice
8:00 - 8:55 AM	Teach *(Literacy/Math block observed by associate/CTA)*	Teach *(observed by associate/ or co-taught with CTA)*	Teach *(co-taught with CTA)*	Planning	Co-teach with Partner
9:00 - 9:45 AM	Schoolwide walkthrough & student support coordination	Teach Small Group RTI	Teach Small Group RTI	Teach Small Group RTI	Support Small Group RTI

[85] Includes co-teaching with a Senior Associate or Partner.
[86] Small group only; do not lead whole group instruction.
[87] The schedule that is shown is a sample of a daily schedule. What is presented is not meant to align with each other as final schedules will be dependent on student need and the master schedule.

9:48 - 10:43 AM	Coaching meeting *(Mid/Junior Associate)*	Observe Coaching Load *(Mid/Junior Associates)*	Planning	Teach	Co-Teach
10:46 - 11:41 AM	Data review, planning support with Senior Associates	Planning/ Coaching Meeting	Planning/ Coaching Meeting	Coaching Meeting	Planning/ Coaching Meeting
11:44 - 12:30 PM	Lunch & family communication	Lunch	Lunch	Lunch	Support for Lunch/Recess
12:31 - 1:26 PM	Support Culture Partner	Teach *(observed by associate/ or co-taught with CTA)*	Teach *(co-taught with CTA)*	Teach	Lunch/ Planning
1:31 - 2:26 PM	Strategic leadership time *(systems, curriculum, data cycles)*	Teach (observed by associate/ or co-taught with CTA)	Teach	Teach	Co-Teach
2:31 - 3:26 PM	Coaching meeting *(Senior Associate)*	Planning	Teach	Teach	Planning
3:26 - 3:40 PM	Support Dismissal	Support Dismissal	Support Dismissal	Support Dismissal	Support Dismissal
3:45 - 4:30 PM	Partners Meeting	Department Meetings/Prep for next day	Meeting with Mentor	Meeting with Department	Meet with Mentor

Evidence base for The Gate School Staffing model

Stronger Staff Recruitment & Retention

Schools and districts across the country using strategic staffing models are finding significant positive impacts on teacher recruitment and retention. Research from TN SCORE[88] shows that when teachers have access to shared planning, embedded coaching, and differentiated roles, they stay in the profession longer, perform at higher levels, and report greater job satisfaction. By aligning roles with strengths and providing opportunities for advancement without leaving the classroom, schools create the professional conditions that make teaching a sustainable, desirable career.

Job Satisfaction:

[88] TN Score: Strategic School Staffing: Tennessee's Opportunity to Sustain and Elevate Great Teaching

- At Arizona State[89] University's Next Education Workforce schools, 75% of teachers in team-based models report being somewhat or extremely satisfied with their jobs—compared to just 66% of traditional classroom teachers in the same districts.
- Research[90] shows that 90 percent of beginning teachers assigned a mentor were still teaching two years later. However only about 78 percent of beginning teachers who were not assigned a mentor were still in the classroom over that same period.
    - The Teaching Firm includes co-teaching apprentice roles that are for novice educators to co-teach and plan alongside a mentor teacher during their first two years of teaching.

Recruitment and Retention:

- In one Indianapolis school[91]staff retention increased from 50% to 97% within three years of implementing multi-classroom leader teams, and teacher applications rose to 150 per vacancy.
- Opportunity Culture[92] schools found that 97% of teachers in Multi-Classroom Leader roles and 87% of all team members say they want the model to continue, citing its impact on collaboration, coaching, and professional growth.

Compensation:

- Differentiated compensation models can improve retention of effective educators and improve student outcomes. Research conducted through meta-analyses and a comprehensive review of studies on teacher retention all confirm that salaries are a key component in retention for teachers in general. The Gate School is strategically investing in compensation, with teachers making on average **26%** more than district counterparts (see question 42 for side by side compensation comparison and the budget details in **Attachment 9**).

Increased Student Outcomes

Research[93] shows that teachers are the most important factor in a student's education, and teacher quality and variability across and within schools impacts both short and long-term outcomes, including income level as an adult. The entire structure of the Teaching Firm model is rooted in improving student outcomes.

School Model Proof Points

Ember Middle School Results

Ember Charter School[94] provides an important proof point for The Gate School's Teaching Firm model because it demonstrates that a teacher-led public charter school can produce strong academic outcomes while serving students with significant needs. Ember's model shares several core commitments with The Gate School:

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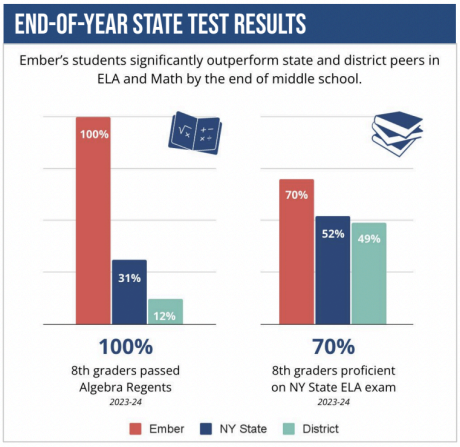
[89] Teachers in Next Education Workforce™ models
[90] NCES Resources | IES
[91] How Opportunity Culture® Redesigns Help Address Teacher Shortages
[92] The Opportunity Culture® Results
[93] Teachers Matter | RAND
[94]Ember

- Treating excellent teaching as the center of the school model
- Building a teacher-led structure where educators share responsibility for instruction, student support, school culture, and continuous improvement
- Keeping instructional decision-making close to students and teachers
- Using adult collaboration, coaching, and shared ownership to improve student outcomes

Ember's results[95] demonstrate the strength of these design choices in a public charter context:

- More than 50% of Ember students have experienced and continue to experience significant trauma
- More than 55% growth in ELA and more than 74% growth in Math, according to Ember's reported impact data
- In 2023–24, Ember achieved 50% proficiency in ELA and 52% proficiency in Math, compared with 45% ELA and 44% Math for its community school district
- Students with disabilities achieved 36% proficiency in ELA and 49% proficiency in Math, compared with 24% ELA and 26% Math for the district and 18% ELA and 25% Math in New York



For The Gate School, Ember is relevant because it demonstrates that a Teaching Firm-style model can support both rigorous academic expectations and meaningful growth for students with significant needs. Ember strengthens the case that shared adult ownership, excellent teaching, and close attention to student support can produce strong results in a public charter setting.

Washington Latin Results

Washington Latin Public Charter School[96] (grades 5–12) provides an important proof point for The Gate School's model because it demonstrates that a public charter school can sustain rigorous academics, discussion-based instruction, strong adult culture, and high family demand. Washington Latin's model shares several core commitments with The Gate School:

- Treating school as a serious intellectual place where students learn, think, discuss, and engage deeply with ideas.
- Keeping administrators connected to the classroom so leaders continue to teach, model excellent instruction, and remain grounded in student learning.
- Using discussion and Socratic inquiry as central instructional practices, rather than relying primarily on teacher monologue.
- Building an adult culture where teachers and leaders share responsibility for teaching, learning, and schoolwide excellence.

[95] Ember Charter School Results
[96] Washington Latin

Washington Latin's results demonstrate the strength of these design choices in a public charter context.

Middle School ELA Proficiency 2024-2025[97]			
Student Group	**Washington Latin Middle School**	**DC District**	**Difference**
All Students	**74.5%**	37.6%	**+36.9 pts**
Economically Disadvantaged	**42.3%**	20.9%	**+21.4 pts**
English Learners	**44.4%**	22.1%	**+22.3 pts**
Students with Disabilities	**40.6%**	11.9%	**+28.7 pts**

Additionally, Washington Latin also demonstrates strong organizational health and family demand, including 91% annual faculty retention, 10+ year average staff tenure, 100% graduation rate for the Class of 2025, 80%+ college matriculation, $16 million in scholarships and grants, and 3,000+ students on the waitlist.

Opportunity Culture Results

Students gain an extra half-year of learning each year, on average, when an educator in the Multi-Classroom Leader® role with prior high growth leads a teaching team with a variety of team role options. The odds of a teacher helping students make high-growth learning more than double when on these teams.

Arizona Education Workforce

Students demonstrated significant academic gains: they achieved 1.4 additional months of growth in third-grade reading compared to peers, and passed Algebra 1 at higher rates overall, including a 4-percentage-point increase across all students and a 7-point increase for Latina learners.

Stronger Organizational Culture

- **Collaboration:** This strategic staffing model aligns to The Gate School's culture vision (see question 14) and core belief that collaboration cultivates the type of environment where students and adults thrive. Next Education Workforce found that staff in this type of strategic staffing model report higher levels of almost daily collaboration at double the frequency of their colleagues in traditional classroom models[98].

[97] DC School Report Card

[98] Teachers in Next Education Workforce™ models are more satisfied than teachers in traditional classroom models | Mary Lou Fulton College for Teaching and Learning Innovation

- **Trust:** Research on distributed leadership shows that when educators share decision-making authority, trust and mutual respect increase across organizational levels[99]. By ensuring that Partner roles remain active teachers, our model eliminates the traditional hierarchy that can separate leadership from the classroom, cultivating a "we" culture where educator expertise is valued and decisions are made in partnership.
- **Agency and Growth:** Strategic staffing models that include differentiated roles and shared decision-making strengthen teacher agency and professional satisfaction. Studies on Opportunity Culture[100] and Education First's[101] strategic staffing shows that educators in team-based roles report higher job satisfaction, clearer growth pathways, and a stronger sense of impact—key drivers of a positive, sustainable adult culture.

Question 42: Explain the school's strategy to recruit and retain high-performing teachers. Outline the school's proposed salary ranges, employment benefits, and any incentive structures. Compare the salary ranges to the resident district and explain how they are sufficient to recruit teachers.

The Gate School's success depends on one thing above all else: great teaching. Our strategy to recruit and retain high-performing educators is intentional, multi-faceted, and directly aligned with our mission to cultivate student independence, effective communication, and academic excellence through outstanding teaching.

Our strategy to recruit and retain high-performing educators is multi-faceted and proactive, built around three priorities: attracting exceptional talent, developing and supporting teachers once they join, and ensuring they are compensated, celebrated, and retained over time.

Attracting Exceptional Talent

The Gate School's recruitment strategy focuses on cultivating future educators while attracting experienced, mission-driven teachers who seek a collaborative and innovative environment.

Competitive Compensation as a Recruitment Driver

To signal our commitment to outstanding teaching, salaries across The Gate School's instructional roles average approximately 26 percent higher than comparable MNPS positions. This compensation strategy is featured prominently in all recruitment materials and outreach to ensure candidates understand the professional value placed on excellent teaching.

Immersive Recruitment Experiences

Rather than relying solely on traditional interviews, The Gate School invites prospective educators to experience the model firsthand. Recruitment efforts include:

- Focus groups hosted and sponsored by The Gate School where educators engage in conversation about teaching, sustainability, and leadership.

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[99] James P. Spillane, Distributed Leadership (San Francisco: Jossey-Bass, 2006).
[100] The Opportunity Culture® Strategy
[101] Education First: Strategic School Staffing Landscape Scan Transforming School Staffing to Improve Student Learning and Reimagine the Role of Teachers

- Open professional learning sessions hosted at spaces such as the Teach For America Nashville and The Educators Cooperative, focused on discussion-based instruction, instructional coaching, and responsible AI use.
- Virtual "Learn About Teaching at The Gate School" sessions that walk candidates through daily practice, collaboration routines, and growth pathways.

Network-Driven and Targeted Outreach

Recognizing that strong teachers trust other strong teachers, The Gate School prioritizes network-based recruitment strategies to attract high-quality, mission-aligned educators.

Teacher Referral Program (Staff-Only)

The Gate School will implement a formal teacher referral program to leverage trusted professional networks and strengthen early retention.

- Current staff may refer candidates for instructional roles.
- Referring staff receive a $500 bonus upon successful hire of their referral.
- An additional $500 retention bonus is awarded if the referred educator completes the full academic year in good standing.

This structure serves two purposes: it capitalizes on the professional judgment of high-performing educators, and it reinforces alignment and long-term commitment by tying incentives to retention, not just hiring. The program strengthens candidate quality, improves early retention, and reinforces shared ownership of team excellence.

Targeted Network Outreach

- Outreach to alumni networks from organizations such as Teach For America, Nashville Teacher Residency, local networks, and teacher residency programs
- Direct engagement with educator preparation programs and leadership pipelines aligned to The Gate School's instructional model

Digital and Platform-Based Recruitment

- Targeted job postings on TN-EdJobs, Handshake, and major teacher job boards
- LinkedIn and social media campaigns highlighting the Teaching Firm model, differentiated compensation, and clear career pathways
- A dedicated "Work at The Gate School" webpage featuring sample schedules, coaching structures, and transparent salary ranges

Pipeline Partnerships & Grow-Your-Own Pathways

The Gate School will recruit talent through both external partnerships and internal development pathways. University and residency partners such as the Belmont Urban Teaching Fellowship and Nashville Teacher Residency (NTR), and Lipscomb University College of Education provide a steady pipeline of well-prepared, mission-aligned educators. At the same time, the school will cultivate educators from within by supporting paraprofessionals and instructional support staff through state-approved licensure routes, including Tennessee's Registered Teacher Apprenticeship Program and job-embedded licensure options. Together, these complementary pipelines expand workforce diversity, strengthen long-term retention, and ensure a continuous flow of teachers trained in The Gate School's model.

Mission Driven Recruitment

The Gate School presents teaching as a profession of growth, leadership, and purpose. To date, 16 educators have expressed interest in teaching or leading at The Gate School (see **Attachment 1.6** for more detail) drawn by its focus on teacher autonomy, career pathways, and the opportunity to shape an innovative school from the ground up that centers around outstanding teaching.

Selective Hiring Process

Candidates will be evaluated through demonstration lessons, student work analysis, and collaborative interviews to ensure alignment with The Gate School's core values, instructional model, and culture of excellence.

Developing and Supporting Educators

Once hired, teachers at The Gate School receive continuous, embedded professional development designed to ensure excellence, collaboration, and long-term growth.

- **Structured Induction for Novice Teachers:** All new to the profession unlicensed teachers or teachers within a residency program, begin as Co-Teaching Apprentices, paired with a Senior Associate or Partner for 1-2 years depending on their program. This apprenticeship mirrors the research-based features of high-quality teacher residencies, which pair novice teachers with expert mentors for extended clinical practice. Research[102] shows that residency-style models increase teacher effectiveness, reduce early-career burnout, and significantly improve retention, especially in high-need schools. By providing daily modeling, feedback, and integrated professional learning, our induction structure ensures new teachers build confidence, develop strong instructional habits, and remain in the profession longer.
- **Embedded Coaching and Collaboration:** Every associate participates in weekly coaching cycles that are built into the master schedule, and monitored by the Partner team to ensure they are consistently used and protected, including:
    - Reciprocal observation (coach and teacher observe each other)
    - A 55-minute individual coaching session focused on one high-leverage goal
    - A 55-minute team collaboration block for unit planning, Harkness prep, and looking at student work
- **Ongoing Professional Learning:** Professional development throughout the year focuses on differentiated instruction, Universal Design for Learning, data analysis, and facilitation of discussion-based learning such as the Harkness Method. Summer training provides foundations in instructional design, co-teaching models, and classroom culture, while monthly sessions deepen expertise in response to observed needs and student performance data.
- **Leadership Through Teaching:** In keeping with The Gate School's "Teaching Firm" model, every instructional leader teaches daily, reinforcing shared accountability and modeling best practices. This design ensures that all feedback and coaching remain grounded in authentic classroom practice.

Through this system of structured mentorship, continuous coaching, and peer collaboration, The Gate School creates a professional culture where every teacher, novice or veteran, is supported to grow, excel, and lead.

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[102] Taking the Long View: State Efforts to Solve Teacher Shortages by Strengthening the Profession

Retaining and Rewarding Excellence

Our retention strategy is rooted in meaningful career advancement, competitive compensation, voice and agency, and tangible recognition.

Teacher Voice and Shared Leadership

Research[103] highlights that schools with strong professional autonomy, collaborative decision-making, and meaningful teacher leadership experience significantly lower rates of teacher attrition. When educators have real influence over instructional practices and school priorities, they report a greater sense of ownership, professionalism, and long-term commitment to the school. **We do this through three integrated structures:**

- **Partner Council with Rotating Teacher Advisors:** The Partner team meets weekly to set instructional and operational priorities. Each month, two rotating teachers (one Senior or Mid Associate, one Junior Associate or CTA) join the meeting to provide input on schedules, instructional priorities, culture systems, and assessment design. Their recommendations directly influence final decisions, and meeting summaries highlight where teacher input shaped outcomes.
- **Teacher-Driven PD and Instructional Priorities:** Twice yearly, staff use school-wide data to vote on the schoolwide PD focus areas and the next instructional priority (for example, academic discourse routines or small-group differentiation). These teacher-selected priorities drive coaching cycles, PD agendas, and instructional implementation across the semester.
- **Teacher-Led Pilots with Real Adoption:** Any teacher may propose a small-scale instructional or culture pilot. After an 8-week implementation window and review of student work, classroom data, and teacher reflection, the Partner team determines whether the pilot should be adopted schoolwide. Teachers who lead successful pilots then facilitate training for peers, reinforcing that innovation and leadership thrive within the classroom.

These structures ensure teachers have real influence on the school's direction, reinforcing professionalism and autonomy while strengthening retention.

Career Pathways

The Gate School's **Teaching Pathways Framework** provides advancement within the classroom through roles that expand responsibility and impact:

- Co-Teaching Apprentice: Novice educator paired with a mentor to develop core teaching competencies.
- Junior Associate: Independent lead teacher demonstrating consistent classroom practices and student outcomes
- Mid-Level Associate: Teacher-leader supporting peers through mentorship and collaboration.
- Senior Associate: Proven instructional leader guiding coaching, professional learning, and schoolwide initiatives.
- Partner: Master educator and strategic leader shaping school priorities and serving as a steward of the mission.

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[103] Teacher Turnover: Why It Matters and What We Can Do About It

Competitive Compensation

This career-ladder compensation structure allows educators to grow professionally and earn increased compensation without leaving the classroom. Using its projected Year 3 staffing model, The Gate School pays instructional staff approximately 26% above MNPS on average, while intentionally concentrating higher compensation in experienced, high-impact teaching roles to support retention, instructional leadership, and long-term sustainability.

Role	TGS Salary	MNPS Salary	% Above District
Co-Teaching Apprentice/ Paraprofessional	$40,000	$30,226[104]	32%
Junior Associates: Typically 2-4 Years Experience	$65,000	$57,160[105]	14%
Mid-Level Associates: Typically 4-7 Years Experience	$75,000	$60,710.82[106]	24%
Senior Associate: Typically 7+ Years Experience	$100,000	70,655.34[107]	42%

This structure creates clear advancement pathways while ensuring compensation reflects experience, responsibility, and instructional impact.

Weighted Average[108] Salary Comparison (Year 3 Staffing Model)

Role	The Gate School Salary	MNPS Salary	% Above District
Weighted Average Salary	$71,667	$57,074	+26%

Benefits and Incentives

In addition to salary, The Gate School will offer a comprehensive benefits package that includes:

- Employer-sponsored health, dental, and vision insurance
- Access to a retirement plan with employer contribution
- Short- and long-term disability and life insurance
- Tuition reimbursement or stipend for advanced coursework, endorsements (e.g., SPED, ESL, Gifted), and leadership programs
- Paid time for professional learning and collaboration built into the school calendar
- Performance-based stipends for exceptional student growth, leadership of key initiatives, and contributions to the Teaching Firm (e.g., leading a major PD series or designing a new accelerated pathway)

Culture of Recognition

The Gate School will maintain a deliberate culture of recognition so that associates see and feel the value of their work. This includes:

- Regular “Gate Associate Spotlights” in family communications and on social media
- Public celebration of teacher achievements at school events and board meetings
- Annual awards tied to the school’s core values (e.g., Independence, Communication, Excellence)

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[104] Support Salary Schedule 2025-2026 (As of 1/19/2026) MNPS support staff salaries were annualized using hourly rates and a 201-day, 10-month calendar, and a 7.5-hour workday.
[105] Certificated Salary Schedule 201 Days 2025-26 (As of 1/19/2026)
[106] Certificated Salary Schedule 201 Days 2025-26 (As of 1/19/2026)
[107] Certificated Salary Schedule 221 Days 2025-26 (As of 1/19/2026)
[108] Weighted averages reflect the school’s projected Year 3 staffing mix across associate and apprentice roles.

- Opportunities for associates to pilot new ideas, lead school-wide projects, and present their work to the board and community

By combining intentional recruitment pipelines, embedded professional learning, and compensation that rewards both excellence and longevity, The Gate School ensures that outstanding educators not only choose to join but choose to stay. This sustained investment in teacher quality will drive consistent, high-level student achievement and organizational stability.

Question 43: Describe the core components of the school's professional development plan and detail how those components will support effective implementation of the school model and instructional plan.

At the Gate School we seek to recruit and retain top teaching talent in order to provide the level of high quality instruction embedded in our model. Professional development is a key lever in reaching this goal because we know that when teachers have access to strong professional development opportunities and time for collaboration and growth, they are more likely to remain in the profession[109].

Professional Development Partnerships

Aligned to our core commitment to collaboration we've proactively developed partnership with leading experts in key areas of our model to provide best-in- class training to our entire staff.

Partners of the Gate School, Areas of Expertise, and Partnership Detail *(Supporting documentation can be found in Attachment 1)*
Ensworth School: *Harkness Method*
Summer Educator Institute: Ensworth will reserve 3 seats annually for Gate School instructional staff members to attend their Harkness training, ensuring faculty can facilitate equitable discussions that foster communication, independence, and collaboration for all students. These skills are foundational to our middle school model, where students are strengthening communication and confidence. **Observations:** Associates will have the opportunity to observe veteran educators facilitating Harkness discussions at least twice per year.
Ember: *Strategic Staffing*
Consulting with partners on best practices for implementation on the teaching firm model and routines for teacher led/collaborative data day PD.
AI for Equity: *AI*
The Gate School is a member of the AI leadership accelerator. Through this partnership all staff members have access to communities of practices and resources dedicated to high quality implementation of AI practices in service of transformational outcomes for our diverse students.
Diverse Learners Cooperative: *Diverse Learners*
Aligned to MNPS demographics, we anticipate that on average 31% of our students will be multi-lingual learners and 14% will have IEPs. We are committed to ensuring every student has access to our academic model and are excited to partner with the DLC as local experts in best practices for all learners. Through a customized impact partnership the DLC will provide

[109] Improving Teacher Retention through Support and Development

professional development and coaching support on topics such as UDL and strong systems and routines for effective IEP/504 management.
Valor Collegiate Academies: *School Culture*
Circle Facilitator Cohort: 3-4 Staff Members will complete this certification to lead high quality Faculty Circles by the end of Year 1. **School Culture Train the Trainer:** The Culture Partner and at least one senior associate will attend Valor's training program to internalize core culture sessions and systems that support middle schoolers' need to feel safe, productive, and known. This training includes access to Valor's core culture playbook and ready to use professional development sessions.

Adapting Professional Development to The Gate School's Student Population

While The Gate School's professional development partners bring expertise from a variety of school contexts. Each professional development strand will be adapted to the academic, linguistic, developmental, and social-emotional needs of the students we expect to serve in Nashville. Based on MNPS demographics, we anticipate serving a diverse middle school population that includes multilingual learners, students with IEPs and 504 plans, students entering below grade level, and students ready for acceleration. As a result, professional development will focus not only on learning the core practices of our model, but on translating those practices into high-rigor, high-support instruction for our specific student population.

The Diverse Learners Cooperative will serve as a key partner in this adaptation process. DLC training and coaching will help staff apply Universal Design for Learning, language supports, accommodations, co-teaching routines, and strong IEP/504 systems across each major component of the school model. For example, Harkness training will be adapted so multilingual learners and students with disabilities have structured access to discussion through sentence frames, pre-discussion preparation, vocabulary support, visual anchors, strategic grouping, and multiple ways to show evidence of thinking. AI training will similarly focus on equitable feedback, revision, language support, and student independence without reducing academic rigor.

This adaptation will continue through TGS's internal development structures. Weekly collaborative planning, observation and feedback cycles, quarterly Data Days, and staff surveys will help leaders identify where students are succeeding, where they are struggling, and what additional adult learning is needed. For example, if students are participating in discussion but not citing evidence, PD will focus on evidence-based discourse. If multilingual learners are not accessing grade-level texts, PD will focus on language scaffolds and vocabulary development. If students with IEPs are not progressing toward goals, PD will focus on accommodations, specially designed instruction, and co-planning between general education and student support staff. In this way, professional development will remain responsive to student needs and directly connected to student access, engagement, and achievement.

Core Structures and Division of Labor

The Executive Partner will retain overall responsibility for the design, implementation, and monitoring of staff professional development, while delegating components to Partners and

Senior Associates as outlined below to ensure high-quality and sustainable coaching and development. This structure ensures clear accountability for outcomes while leveraging the expertise of multiple leaders to execute specific PD structures effectively.

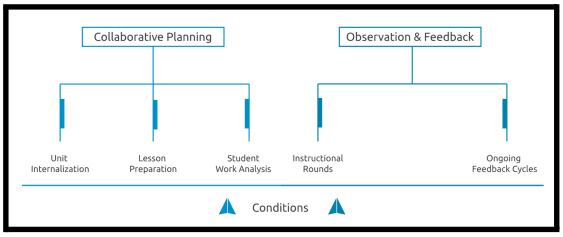
Development Structure	Frequency	Participants	Owner(s)
Collaborative Planning	Weekly (55 minutes)	All instructional staff	Associates
Reciprocal Observations	Coach observes coachees 1/x week Coachee observes Coach 1/x week		Partners & Senior Associates
1:1 Coaching Meeting	Weekly (55 minutes)	All Staff	
After School PD	30 days per year/ 60 minutes per session		
Year Long PD Days	6 days per year		Associates
Summer PD	15 days for new staff 10 days for returning staff		Partners & Senior Associates
Partner Institute	10 days annually in June	Partners	Partners

Core Structures Detail

These interconnected structures operate as a continuous development loop: summer and partner institutes set annual goals, weekly coaching and collaborative planning drive implementation, and quarterly Data Days provide reflection and recalibration.

Weekly Instructional Development Routines

Our instructional support routines are grounded in two interconnected structures- collaborative planning and observation/feedback cycles to provide differentiated and just in time development that drives outcomes for adolescent learners.



[110]

Collaborative Planning

In our staffing model, many teachers co-teach with another adult, such as a CTA, paraprofessional, or fellow associate. To ensure the success of these partnerships, teams engage in structured collaborative planning to internalize units, prepare lessons, and analyze student work for continuous improvement. These standing co-planning routines are critical at The Gate School, where students display a wide range of readiness levels and learning profiles. Regular collaboration enables teachers to design instruction that is both intellectually challenging and responsive to each learner's needs.

[110] Image source: Instruction Partners

Reciprocal Observations

The Gate School's strategic staffing model creates the unique opportunity for regular reciprocal observations as partners and senior associates open their classrooms transparently as practitioners, modeling that they are truly in the work alongside staff. Research[111] found that structured peer observations (collegial visits) increased teacher self-efficacy, shifted teacher perceptions and emotions about collaboration, and built a professional culture of trust.

1:1 Coaching

Every staff member sustained has a dedicated coach grounded in the research that individualized coaching cycles strengthen instructional practice and academic outcomes for students[112]. Coaching structures will leverage reciprocal observation feedback and data analysis protocols to ensure outcomes driven support.

Professional Development Sessions & Experiences

Year-Long PD

- **After School PD:** As a team we will gather weekly to provide Professional Development on a rotating set of topics such as the Harkness Method, AI integration and best practices, Inclusive Education, School Culture, etc. Our scope and sequence will include space for teacher selected topics via surveys, ensuring teacher voice in identifying their development needs and an active role in leading key areas when possible.
- **Access to external PD** through our strategic partnerships such as training from Ensworth on the Harkness method. Additional details and examples can be found in **Attachment 1.**
- **Quarterly Data Days:** Inspired by the approach used at Ember Charter School, data days at The Gate School will be teacher driven and collaborative. All partners and associates will have the opportunity to present data on their students progress from the past quarter, possible root causes, and aligned solutions for peer feedback.
- **Evaluation:** The effectiveness of our PD plan will be assessed through quarterly staff surveys, classroom observation data, and student progress metrics to ensure adult learning leads to student learning.

Partner Institute

- Partner Institute is designed to align our team around The Gate School's mission, engaged in data driven continuous improvement cycles and deepen expertise in high-impact instructional practices. Held annually in late June, the Institute allows partners to prepare before staff-wide summer training begins. By the end of the institute, every Partner will be equipped to launch the year with clarity, collaboration, and confidence in delivering The Gate School experience.

Summer Professional Development

Our summer PD program ensures every teacher enters the year fluent in The Gate School's instructional and cultural systems. Sessions are tailored for middle school educators, focusing on designing high-rigor, high-support classrooms that leverage Harkness dialogue, inclusive planning, and developmentally responsive routines.

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[111] Peer Observation to Improve Teacher Self-Efficacy

[112] The Effect of Teacher Coaching on Instruction and Achievement

Equally important to the content below, our approach to staff professional development mirrors our instructional vision: rigorous, discussion-based, and experiential rather than passive or lecture-driven. We will facilitate Harkness discussions with staff, using that structure to drive reflection on our shared vision and model the exact learning environment we expect teachers to create for students.

The summer professional development sequence is designed to move staff from understanding the model to practicing and demonstrating readiness to implement it. Each week will include concrete staff deliverables, including first-unit plans, first-week lesson plans, classroom routines, discussion protocols, family introduction call plans, and student-support strategies aligned to anticipated learner needs. Teachers will rehearse the routines they will use with students, including arrival, classroom entry, transitions, discussion norms, independent work expectations, technology use, and dismissal. These rehearsals will be observed by school leadership and followed by feedback so that expectations are practiced and refined before students arrive.

The Gate School's leadership team will retain responsibility for the quality and execution of summer professional development, while partner organizations support targeted areas of expertise. Valor Collegiate Academies will support training on culture systems and routines, Ensworth will support Harkness discussion and seminar facilitation, and Diverse Learners Cooperative will support inclusive planning for multilingual learners, students with disabilities, and students entering below grade level. By the end of summer PD, each teacher will complete a readiness review that includes reviewed lesson and unit plans, practiced classroom routines, family outreach preparation, and evidence that instruction includes appropriate scaffolds, accommodations, and supports for all learners.

Summer Professional Development Calendar				
Key: Training materials and/or execution of sessions supported by partner organizations *(V) Valor Collegiate Academies* *(E) Ensworth* *(DLC) Diverse Learners Cooperative*				
Week 1: New Staff				
Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
The Gate School Vision	Culture Vision & practices 101 (V)	Academic Excellence Vision & Harkness 101 (E)	Operations / HR	First 6 Weeks Vision & Routines
Week 2: All Staff				
Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
SY Vision & Priorities / Community Building	Academic Excellence: Session tracks differentiated by content area (e.g. ELA, Math) with discussion and AI practices embedded strategically (E) & Daily Community Building Block			Inclusive Education- Supporting all Learners (DLC)
Week 3: All Staff				
Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**

Culture Systems, Routines, & practices (V) Family Partnership Best practices & Work time for family intro calls	Operational Excellence & Safety Procedures	Harkness 201 (E)	Classroom setup & day 1 routines practice

Facilities

Question 44: Describe facility needs based on the educational program and projected enrollment.

The Gate School evaluates potential facilities using a structured feasibility rubric to ensure that any site selected can fully support the school's educational program, projected enrollment, and commitment to student safety and accessibility.

This rubric is used early in the site selection process to assess legal viability, life safety compliance, and instructional fit, and again prior to final site selection to identify risks, required mitigations, and cost implications. It reflects a clear understanding of zoning, building code, fire and life safety, accessibility, and operational requirements specific to educational use in Metro Nashville.

Rubric for Site Evaluation			
Category	**Key Questions / Criteria**	**Applicable Codes, Standards & Agencies**	**Feasibility Rating**
Base Project Needs	Can the site support a secondary school serving projected enrollment? Does the building footprint and site layout allow for required instructional, administrative, and student support spaces?	Educational program requirements[113]	☐ Feasible ☐ Conditional ☐ Not Feasible
Space Requirements	Does the building provide sufficient square footage for classrooms, Seminar, student services, administration, and required circulation? Can spaces be configured to support discussion-based instruction?	Program assumptions; IBC occupant load (§1004)[114]	☐ Feasible ☐ Conditional ☐ Not Feasible
Targeted Location	Is the site located within the defined catchment area and accessible to families within a 20–30 minute commute? Is it aligned to community outreach and enrollment demand?	Transportation access; enrollment strategy	☐ Feasible ☐ Conditional ☐ Not Feasible
Timeline	Can the site be designed, permitted, and constructed to align with the planned school opening? Are approvals sequenced realistically?	Metro Codes permitting timelines[115]	☐ Feasible ☐ Conditional ☐ Not Feasible
Long- vs. Short-Term Viability	Does the site support phased growth and long-term occupancy? Are there expansion or reconfiguration constraints?	Lease / ownership terms; site capacity	☐ Feasible ☐ Conditional ☐ Not Feasible

[113] https://www.tn.gov/education/families/school-options/charter-schools.html
[114] https://codes.iccsafe.org/content/IBC2018/chapter-10-means-of-egress
[115] https://www.nashville.gov/departments/codes

Affordability	Is the base rent or purchase price sustainable within the school's operating budget?	Financial model assumptions	☐ Feasible ☐ Conditional ☐ Not Feasible
Tenant Improvements	Are tenant improvements feasible within budget? Are major systems reusable?	Construction feasibility; cost estimates	☐ Feasible ☐ Conditional ☐ Not Feasible
Budget Allocation Assumptions	Do projected TI costs and facility-related expenses remain within an acceptable percentage of the start-up and operating budget?	Board-approved budget assumptions	☐ Feasible ☐ Conditional ☐ Not Feasible
Zoning & Land Use	Is "School" an allowed use (by-right or conditional)? Are HOA or additional approvals required? Are there floodplain or overlay constraints?	Metro Nashville Zoning Code;[116] Floodplain regulations[117]	☐ Feasible ☐ Conditional ☐ Not Feasible
Building Code Analysis	Can the building comply with Educational (Group E) occupancy? Does construction type allow required height and area? Are egress and corridor widths compliant or correctable?	IBC §305[118]; Ch. 6; Tables 504 & 506; §§1005–1006	☐ Feasible ☐ Conditional ☐ Not Feasible
Accessibility Compliance	Are accessible parking, routes, entrances, and interior circulation compliant? Can deficiencies be corrected without major site work?	2010 ADA[119]; ICC A117.1[120]	☐ Feasible ☐ Conditional ☐ Not Feasible
Fire & Life Safety Review	Is the building sprinklered? Can fire alarm and emergency voice/alarm communication be provided? Is fire department access compliant?	IBC §903; §907.5.2.2.3[121]; IFC §503; TN SFMO[122]	☐ Feasible ☐ Conditional ☐ Not Feasible
Site / Building Utilities & Infrastructure	Are water, sanitary, HVAC, electrical, and structural systems adequate for Group E use? Are major systems near the end of life?	Mechanical[123], Electrical[124], Plumbing	☐ Feasible

[116] General zoning code for land use, permitted uses, districts, overlays, and related standards:
[117] Metro Government Stormwater Management Manual
[118] International Building Code (2018/2021/Latest) – Means of Egress / Occupant Load / Structural Criteria
[119] https://www.ada.gov/law-and-regs/design-standards/
[120] ICC A117.1 – Accessible and Usable Buildings
[121] 2024 International Fire Code (IFC) - 907.5.2.2 Emergency voice/alarm communication systems.
[122] Tennessee State Fire Marshal's Office – Adopted Codes (Includes IBC, IFC, and Related Fire/Life Safety Codes)
[123] 2024 International Mechanical Code (IMC)
[124] NFPA 70 (NEC) Code Development

		Codes[125]; IBC Risk Category III[126]	☐ Conditional ☐ Not Feasible
Other Agency Requirements	Can Tennessee DOE facility guidelines be met (secure vestibule, glazing protection)? Are stormwater or environmental approvals required?	TN DOE Facility Guidelines[127]; Metro Stormwater[128]	☐ Feasible ☐ Conditional ☐ Not Feasible
School Safety & Security	Can the site support controlled entry, secure vestibule, and supervision of student movement? Can safety measures be implemented without compromising instruction?	TN DOE; CPTED principles	☐ Feasible ☐ Conditional ☐ Not Feasible
Metro Nashville Health Department	Can food service, sanitation, and student health requirements be met? Are upgrades required for compliance?	Metro Nashville Health Department	☐ Feasible ☐ Conditional ☐ Not Feasible

Viability and Affordability

The Gate School will pursue a single-building, adaptive reuse facility strategy to support its instructional model and projected enrollment while maintaining flexibility for long-term growth. The initial site may function as an incubation facility, with the option to transition to a permanent home as enrollment stabilizes.

The Gate School is pursuing a single-building, adaptive reuse strategy that can serve as either:

- A short- to medium-term incubation site, or
- A long-term facility capable of supporting enrollment growth

Sites are evaluated for flexibility, scalability, and financial sustainability to avoid unnecessary future relocations. Facility affordability is a core selection criterion. The school will evaluate total occupancy costs, including rent, operating expenses, and maintenance, to ensure alignment with long-term financial projections.

- Projected tenant improvement costs: $500-600K
- Estimated percentage of budget allocated to facilities: <15% in Year One

All major facility expenditures and contracts over $25,000 will be reviewed and approved by the governing board

Facility Space Needs

The Gate School's humanities program is centered on the Harkness Method, a discussion-based approach in which students sit around a shared table to engage in structured, student-led dialogue. In humanities classrooms, this model emphasizes close listening, evidence-based

[125] 2024 International Plumbing Code (IPC)
[126] 2024 International Building Code (IBC)
[127] Best Practices for K-12 Facility Design: Safety Security Resilience Preparedness
[128] Metro Nashville Stormwater Management Manual – Regulations

reasoning, and active participation from every student. To support Harkness without requiring oversized classrooms, The Gate School will use adaptable, modular furniture systems that allow full-class oval discussions within standard classroom footprints. The same furniture can be reconfigured quickly for small-group collaboration, conferencing, and independent work, supporting instructional flexibility across the school while maintaining efficient space utilization and alignment with facility constraints.

The facility must be capable of supporting projected enrollment growth without compromising instructional quality or safety. See below for the space program needs over time to full growth.

THE GATE SCHOOL

THE GATE SCHOOL SPACE PROGRAM

	YEAR 1	YEAR 2	YEAR 3
	2027-28	2028-29	2029-30
GRADES SERVED	6th	6th, 7th	6th, 7th, 8th
NUMBER OF STUDENTS	120	240	360
NUMBER OF STAFF	15	20	32
MAX STUDENTS PER CLASS PER CODE	30	30	30

EDUCATIONAL SPACES					
Room Type	NOTES	Approximate Sq Ft	YEAR ONE 2027-28 # Needed	YEAR TWO 2028-29 # Needed	YEAR THREE 2029-30 # Needed
Classrooms	(Math, ELA, Science, SS, Electives)	750	4	8	12

LARGE ASSEMBLY SPACES					
Room Type	NOTES	Approximate Sq Ft	YEAR ONE 2026 - 2027 # Needed	YEAR TWO 2027 - 2028 # Needed	YEAR THREE 2028 - 2029 # Needed
Multipurpose	Assuming this may be utilized for student meal service as well as additional needs	2200	1	1	1
Warming Kitchen		700	1	1	1

ADMIN SPACES					
Room Type	NOTES	Max Sq Ft	YEAR ONE 2026 - 2027 # Needed	YEAR TWO 2027 - 2028 # Needed	YEAR THREE 2028 - 2029 # Needed
Main Office	This will have supplies, copier, etc.	500	1	1	1
Offices		100	2	3	4
Teacher Work Room		600	1	1	1
Resource Room		300	1	1	1
Nurses Clinic		300	-	-	1

OTHER SPACES					
Room Type	NOTES	Max Sq Ft	YEAR ONE 2026 - 2027 # Needed	YEAR TWO 2027 - 2028 # Needed	YEAR THREE 2028 - 2029 # Needed
Security Vestibule		120	1	1	1
Mother's Room		80	1	1	1

STORAGE SPACES					
Room Type	NOTES	Max Sq Ft	YEAR ONE 2026 - 2027 # Needed	YEAR TWO 2027 - 2028 # Needed	YEAR THREE 2028 - 2029 # Needed
Custodial	Service sink requried	100	1	1	2
IT Closet		80	1	1	1
Storage		200	1	1	2
File Room	Student records	100	1	1	1

RESTROOMS					
Room Type	NOTES	Max Sq Ft	YEAR ONE 2026 - 2027 # Needed	YEAR TWO 2027 - 2028 # Needed	YEAR THREE 2028 - 2029 # Needed
Student Restroom	1 toilet required per 50 students	400	2	2	3
Adult Restroom	1 toilet required for every 40 staff members	80	1	1	2
Guest Restroom		80	1	1	1

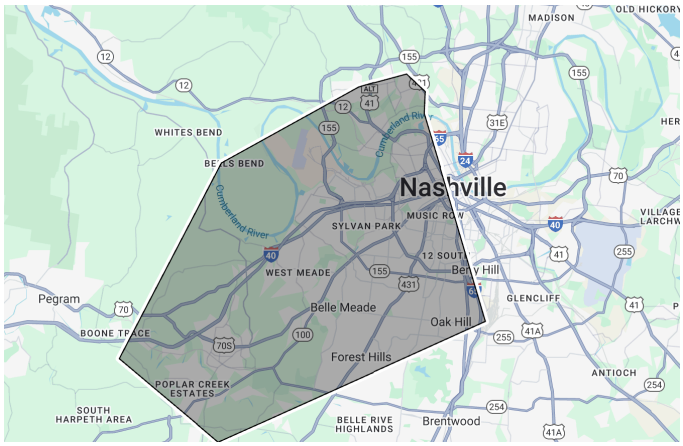
Totals				
Square Footage Allocation Per Student	100	12,000	24,000	36,000

Targeted Location

The Gate School is prioritizing sites in West Nashville, areas experiencing enrollment growth, new residential development, and increasing demographic diversity. Targeted locations must be:

- Accessible to families across the catchment area
- Located near major residential corridors
- Able to safely support student arrival, dismissal, and transportation operations

Catchment Area Map



The proposed catchment area is intentionally designed to support The Gate School's diverse by design model and reflects where families have already demonstrated interest through outreach, events, and direct engagement. Rather than limiting enrollment to a single attendance zone, the catchment spans multiple neighborhoods across west and southwest Nashville, allowing the school to draw from communities with varied socioeconomic, racial, and educational backgrounds.

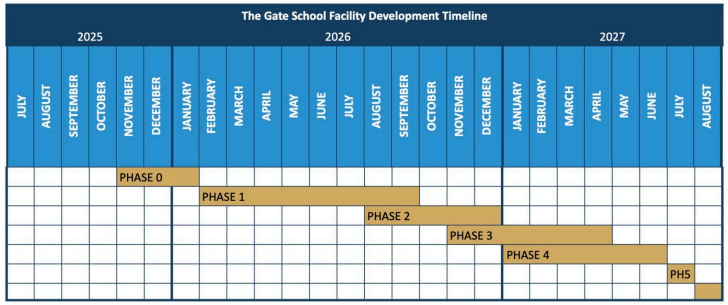
This approach aligns with research and practice around diverse-by-design schools, which rely on cross-neighborhood enrollment to create integrated learning environments that better reflect the broader community. The catchment includes neighborhoods with differing income levels and school options, creating the conditions for a socioeconomically diverse student body while remaining realistic about daily attendance. The boundaries were drawn based on travel time and access, prioritizing communities within a 20–30 minute commute via major transportation corridors such as I-40, Highway 70, and Highway 12. This ensures that families from different parts of the city can reasonably access the school without requiring extensive transportation support or creating barriers for working families.

Importantly, this catchment is consistent with family demand already gathered. The Gate School's community engagement, tutoring partnerships, information sessions, and outreach efforts have primarily engaged families within this geographic area. The proposed catchment reflects where families have expressed interest, attended events, and indicated a willingness to enroll, reinforcing that the area is not theoretical but grounded in real community response.

By defining a catchment that is both diverse and practical, The Gate School is positioned to enroll a student body that reflects Nashville's diversity while maintaining strong attendance, family engagement, and long-term sustainability.

Facility Decision Making Matrix

This working document provides a high-level overview of the facility development process for The Gate School, including a Facility Development timeline and a detailed breakdown of roles and responsibilities across each phase, from early needs assessment through move-in. This matrix, developed with the support of the Nashville Incubator's Director of Facilities, is specifically designed to give school founders a 30,000-foot view of decision-making ownership and collaboration points. It supports clarity and alignment as schools navigate complex facilities development in partnership with internal and external contributors. This matrix is a live, evolving document for The Gate School as the project progresses.



PHASE 0: Assess School Needs and Define Team

Item	The Gate School Burrus Cox & Jim Leckrone	Board	Nashville Incubator Shelby Goodfriend	Broker Avison Young	General Counsel SRVH	Architect HMK
Define instructional and operational facility requirements : Identify needs: square feet, location, amenities	Responsible for completion of template, informing broker of information for site search	-	Supports by creating template and consults though pushing to expand thinking to true minimum needs	Receives information from founder to conduct site search	-	Reviews and provides feedback to adjust
Source Real Estate Broker	Interview candidates provided and select one to move forward with	Must approve founder signing any exclusive agreement	Provide possible candidates	Interview with founder	-	-
Engage with Legal Counsel	Interview candidates provided and select one to move forward with	Must approve founder signing any agreement	Provide possible candidates	-	Provide representation agreement	-
Source Architect for Feasability Study	Interview candidates provided and select one to move forward with	-	Provide possible candidates	-	Review any agreements from architect	-

PHASE 1: Site Viability & Facility Acquisition								
Item	The Gate School	Board	Nashville Incubator	Broker	General Counsel	Architect	Owner's Rep	General Contractors
	Burrus Cox & Jim Leckrone		Shelby Goodfriend	Avison Young	SRVH	HMK	True North	Multiple
Source Viable Sites	Ultimate owner. Ensures broker provides survey, reviews sites, selects which sites to tour based on initial review	Receives updates, provides guidance to founder	Reviews broker survey with founder using viability framework	Owns process by creating survey of available sites that meets needs	-	Reviews sites in advance of touring to ensure initial viability of location	-	-
Conduct Initial Site Visit and Feasability Tour	Ensures that site meets legal and practical requirements based on Facility partners review of sites (eg. ADA, zoning, occupancy, safety, traffic flow, storm water, etc) Releases Architect to conduct full feasability review for top sites toured	Invited to attend	Hire and pay for Initial Architect and Owner's Rep for Phase 1 Support Supports by attending tour to translate specific construction language for founders, provide guidance regarding questions to ask, etc. Ensures site meets all legal and practial requirements. Flag any concerns to stakeholders.	Schedules tours of sites	Reviews any legal concerns flagged during site walk	Reviews site and plans for viability (ADA, zoning, occipancy, safety, traffic flow, storm water, etc) as well as school specific space needs. Complete full feasibility review upon request of founder.	Attends site walk	Attend site visit to gather data for initial pricing
Create Concept Drawings of Site	Review concept drawings against instructional and operational requirements. Provides feedback	-	Supports founder with review and feedback to stakeholders	-	-	Creates concept drawings of site	Review concept drawings against instructional and operational requirements. Provides feedback	Utilize concept drawings to gather data for initial pricing
Get Inital GC Pricing for Improvements	Reviews initial pricing and compare to budget targets	-	Review GC Pricing and provide support with founder analysis	Review GC Pricing and provide analysis for how to negotiate deal terms based on pricing	-	Provide answers to any questions from GC	Review GC Pricing and provide analysis to founder	Provide initial GC price estimate
Submit RFQ to Landlord	Reviews all drafts and revisions, provide feedback Inform board of RFQs going out to potential sites	-	Review RFQ and provide feedback ahead of submission	Creates RFQ and sends to stakeholders to review as requested by founder	Review RFQ and provide feedback ahead of submission	-	Review RFQ and provide feedback ahead of submission	-
Submit Letter of Intent (LOI) to Landlord	Reviews all drafts and revisions, negotiation points and sign final draft with single site	Must approve Founder signing	Reviews LOI and provides feedback	Creates LOI	Reviews LOI and provide feedback ahead of submission	-	Reviews LOI and provide feedback ahead of submission	-
Lease Agreement	Reviews all drafts and revisions, negotiation points and sign final draft with single site	Must approve Founder signing	Reviews lease and provides feedback	Reviews lease and provides feedback	Creates lease, supports with negotiation and ongoing edits to lease based on landlord feedback	-	Review lease and provide feedback ahead of submission	-

PHASE 2: Facility Planning								
Item		The Gate School		Nashville Incubator	General Counsel	Owner's Rep	Architect	General Contractors
		Burrus Cox & Jim Leckrone	Board	Shelby Goodfriend	SRVH	Selected in Phase 2	Selected in Phase 2	Multiple
Due Diligence Period		Review recommednations from architect with incubator to decide which diligence items are necessary to go forward with. Review proposals for due diligence needed Request Incubator covers payment for due diligence surveys or inspections needed	Approve any diligence items required per bylaws as needed if items exceed cost of Incubator soft cost grant	Review recommednations from architect and make recommendations to founder about which to go forward with. Review proposals for due diligence needed Pay for due diligence surveys or inspections needed	Provides risk assessment regarding property and which diligence items are highest priority	Gets proposals for additional due dilligence needed Begins and leads weekly OAC meetings with stakeholders to ensure all facility partners are aligned	Leads diligence efforts and makes recommendations on needs based on codes and preliminary conversations	-
Undergo Request for Proposals (RFP) s for Services	Owner's Representative Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubuator. Vote to select Owner's Representative if required by bylaws, state and federal guidelines	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from owners rep who wins the bid Pay for services on behalf of school with incubator soft costs grant	Reviews RFP process to ensure compliance	Submits RFP	-	-
	Architectural Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder, Incubuator, and Owner's Rep. Vote to select Architect if required by bylaws, state and federal guidelines	Review proposals with founder and board and provide recommendation based on bids received.	Reviews RFP process to ensure compliance	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received	Submits RFP	-
	General Contractor Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder, Incubuator, Architect, and Owner's Rep. Vote to select General Contractor if required by bylaws, state and federal guidelines	Review proposals with founder and board and provide recommendation based on bids received.	Reviews RFP process to ensure compliance	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from architect who wins the bid	Reviews RFP before publishing Hosts walkthrough of building with general contractors	Submits RFP
	School Nutrition	Create RFP based on TDOE School Nutrition Procurement Procedures. Work with Nutrition office to ensure full compliance throughout process	Ensure compliance with TDOE School Nutrition Procurement process during RFP and selection. Vote to select Food Service Agency if required by bylaws, state and federal guidelines	Supports by providing context and connecting founder to resources	Reviews RFP process to ensure compliance	Attends walkthrough of site to ensure alignment between parties	Updated on type of food service to ensure space needs are met Attends walkthrough of site to ensure alignment between parties	-
	Cleaning Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubator Vote to select Cleaning Services Vendorif required by bylaws, state and federal guidelines	Supports by providing context and connecting founder to resources	Reviews RFP process to ensure compliance	-	-	Updated on scope of work needed for construction closeout and final deep clean
	IT Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubator Vote to select IT vendor if required by bylaws, state and federal guidelines	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from vendor who wins the bid	Reviews RFP process to ensure compliance	-	-	-
	Furniture Vendor	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubator Vote to select furniture vendor if required by bylaws, state and federal guidelines	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from vendor who wins the bid	Reviews RFP process to ensure compliance	-	-	-

PHASE 2 (continued): Facility Planning								
Item		The Gate School		Nashville Incubator	General Counsel	Owner's Rep	Architect	General Contractors
		Burrus Cox & Jim Leckrone	Board	Shelby Goodfriend	SRVH	Selected in Phase 2	Selected in Phase 2	Multiple
Review & Sign Contracts or Proposals for Services	Architectural Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback, negotiates with architect. If unable to come to resolution, involve attorney	Creates standard AIA contract	-
	General Contractor Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	Reviews contract and provides feedback	Creates standard AIA contract
	Owner's Representation Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Provide proposal and contract for review	-	-
	Food Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Ensure TDOE Nutrition team has active involvement and approves of final selection, and reviews contract prior to moving forward Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders. Ensure full compliance with TDOE process. Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	-	-	-
	Cleaning Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	-	-
	IT Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	-	-
	Furniture Vendor	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	-	-
Complete schematic design and construction documents		Reviews CD set and provides feedback Keeps digital copy in school records	-	Reviews CD set and provides feedback	-	Reviews CD set and provides feedback	Creates CD set	Reviews CD set and provides feedback
Create Project Manual		Keeps digital copy in school records	-	Receives project manual	-	Distributes project manual	Creates project manual	Receives project manual

PHASE 3: Pre-Construction							
Item	The Gate School Burrus Cox & Jim Leckrone	Board	Nashville Incubator Shelby Goodfriend	Owner's Rep Selected in Phase 2	Architect Selected in Phase 2	General Contractors Selected in Phase 2	Furniture Vendor Selected in Phase 2
Submit construction documents to local and state permitting agencies	Aware of status of process	-	Support as needed	Ensures all parties are collaborating as necessary	Submit construction drawings to State Fire Marshal and Local Codes Offices	Pick permitting up and expedite through process accordingly	-
Local Codes & Fire Marshal Plan Review	Aware of status of process	-	Supports as needed	Ensures all parties are collaborating as necessary	Holds preliminary conversations to prevent major barriers	Supports any barriers as needed	-
Finalize Construction Budget	Reviews and approve of any budget changes	Reviews and approves any budget changes as required by bylaws	Reviews all changes with founder to answer any questions	Reviews all changes and sends to founder for review and approval	Reviews all changes and shares any feedback with owner's rep and founder	Finalizes budget based on any changes required during permitting process	-
Order FF&E	Owner of entire process. Approves items to purchase and places order in alignment with timeline	Must approve any expenditure above threshold per bylaws	Supports by providing context, reviewing options, and connecting founder to resources	Aware of timeline to implement into overall project schedule	Provides context for any code restrictions based on building limitations. Provides CAD drawings to vendor	Aware of timeline to implement into overall project schedule	Provides pricing, options, and samples for FF&E. Ensures compliance with competitive procurement process
OAC Meetings	Attends OAC meetings as requested by Owner's Rep	-	Attends OAC meetings	Hosts weekly OAC meetings	Attends OAC meetings	Attends OAC meetings	Attends OAC meetings as needed

PHASE 4: Construction						
Item	The Gate School Burrus Cox & Jim Leckrone	Board	Nashville Incubator Shelby Goodfriend	Owner's Rep Selected in Phase 2	Architect Selected in Phase 2	General Contractors Selected in Phase 2
Owner, Architect, Contractor (OAC) Meetings	Attends OAC meetings as requested by Owner's Rep	-	Attends OAC meetings	Hosts weekly OAC meetings	Attends OAC meetings	Attends OAC meetings
Inspections	Gets updates regarding inspections, updates board as needed	Receives updates	Attend as needed	Attends all inspections	-	Manages all site inspections
Weekly Walkthroughs	Attends at least every other site walk	Invited at least once to do site walk	Attend weekly site walk	Schedules weekly site walk	Attend weekly site walk	Leads weekly site walk with updates regarding construction status
Change Orders	Reviews and signs change orders	Reviews all change orders and approves any above the threshold per bylaws	Reviews all change orders with founder to answer any questions	Reviews all change orders and sends to founder for review and approval	Reviews all change orders and shares any feedback with owner's rep and founder	Submits all change orders to Owner's Rep for review
Pay Applications	Reviews and signs pay application after both architect and owner's rep sign off Processes payment to general contractor	Reviews all pay applications as required per bylaws	Reviews all pay applications with founder to answer any questions	Reviews all pay applications and sends to founder for review, approval and payment processing	Reviews, approves and signs off on all pay applications based on work completed during most recent walkthrough	Submits pay application to architect and owner's rep for review and approval
Construction Punch	Attends punch walkthrough	-	Attends punch walkthrough	Leads punch walkthrough	Attends punch walkthrough	Attends punch walkthrough

PHASE 5: Final Inspections and Move-In							
Item	The Gate School Burrus Cox & Jim Leckrone	Board	Nashville Incubator Shelby Goodfriend	Owner's Rep True North	General Contractors Selected in Phase 2	Architect Selected in Phase 2	Furniture Vendor Selected in Phase 2
Receive Use & Occupancy	Send U&O letter to authorizer	-	Attend final inspection as needed	Attend final inspection	Lead final inspection Request U&O letter from local codes office Send U&O letter to founder	Attend final inspection	-
Install FF&E and technology	Ensure all furniture is delivered free of damages prior to signing off on delivery	-	Support with any FF&E punch walk necessary	Confirm GC clean is complete and vendors are prepared to install Ensure all FF&E purchased is delivered	Ensure final clean is complete prior to installation	-	Complete installation of all FF&E and technology
Final Pay Application	Reviews and signs final pay application after both architect and owner's rep sign off, and all work is 100% complete Processes payment to general contractor	Reviews final pay applications as required per bylaws	Reviews final pay applications with founder to answer any questions	Reviews all pay applications and sends to founder for review, approval and payment processing	Submits pay application to architect and owner's rep for review and approval	Reviews, approves and signs off on all pay applications based on work completed during most recent walkthrough	-
Final closeout meeting (lessons learned)	Attend Meeting	-	Schedule lessons learned meeting and invite all facility vendors	Attend meeting	Attend meeting	Attend meeting	Attend meeting
Ribbon Cutting	Plans and executes ribbon cutting celebration for school launch	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting

Question 45: Describe the progress to date of identifying and securing a facility in the proposed neighborhood/community that will meet the needs of the proposed school, as described above. Name the individual(s) on the sponsor's team leading the search as well as any brokers or real estate consultants supporting the search.

Progress to Date in Identifying and Securing a Facility

Since Fall 2025, The Gate School has led a structured, milestone-driven facility search to support a Fall 2027 launch. The search is led by Operational Partner Jim Leckrone and Executive Partner Burrus Cox, who established clear facility criteria aligned to the school's instructional model, projected enrollment, safety requirements, and long-term financial plan, as outlined in Question 44.

The Gate School has entered into a Memorandum of Understanding, **Attachment 1.2 C**, with Shelby Goodfriend from The Nashville Incubator through which the founding team has been introduced to and supported in evaluating a range of experienced facilities, real estate, and financing partners. Through this process, the school has made decisions regarding certain partners, while other roles will be finalized through formal RFP processes to ensure alignment, cost discipline, and readiness for execution.

The facilities search is being led by Founding Partners Burrus Cox and Jim Leckrone, in coordination with Shelby and The Nashville Incubator. Profiles of each facilities partner under consideration are included with the MOU in **Attachments 1.2 C** to provide additional detail on organizational qualifications, relevant experience, and anticipated areas of support.

Recognizing the inherent uncertainty in securing facilities during the pre-authorization phase, The Gate School has developed a facilities contingency plan to ensure continuity of operations and alignment with its opening timeline. This plan outlines alternative facility pathways, sequencing options, and decision triggers should a preferred site become unavailable or infeasible. The contingency strategy is described in greater detail in Question 53 and is designed to maintain flexibility while preserving program quality, safety, and financial sustainability.

To date, the team has met with and interviewed more than 20 facility partners, including commercial brokers, architects, general contractors, owners' representatives, finance partners, and legal counsel. This process allowed the team to vet expertise, understand scope and cost drivers, and intentionally determine the combination of partners required to meet both legal and practical facility requirements.

Based on this vetting, The Gate School assembled a multidisciplinary facility team that provides checks and balances across zoning, building code, accessibility, fire and life safety, financial feasibility, and instructional fit. Architectural, strategic advisory, and legal partners independently verify site feasibility prior to advancement, ensuring no single perspective drives decision-making.

At this stage, the school has not selected a final architect or general contractor for construction drawings, by design. Preliminary architectural feasibility is being conducted by HMK Architects to inform site evaluation only; this engagement does not constitute a formal procurement or commitment to a design partner. Once a site is deemed viable, the school will conduct a

competitive RFP process at a minimum for design and construction partners in accordance with T.C.A. 12-4-107 and all other applicable Tennessee procurement requirements. The costs associated with preliminary feasibility work are covered by Nashville Incubator, not by the proposed school, as reflected in **Attachment 1.2 C.**

The facility search is further supported through the Nashville Incubator, which provides access to technical assistance and grant funding to offset early facilities soft costs. While securing a compliant and affordable facility is complex, this disciplined process positions The Gate School to select a site that supports safe operations, instructional quality, and long-term sustainability.

The chart below outlines the individuals and partners currently supporting the facility search and their roles.

The Gate School	
School Team	
Burrus Cox: Founder & Executive Partner	**Jim Leckrone:** Founder & Operational Partner
Co-Leads facility vision and decision-making; conducts site analysis; ensures alignment to instructional model; coordinates with advisors and board.	Co-Leads facility vision and decision-making; conducts site analysis; Oversees operational feasibility, budgeting alignment, and readiness planning.
Burrus Cox serves as Founder and Executive Partner of The Gate School, where he is responsible for overall vision, partnerships, and execution across academics, operations, and facilities planning. While Burrus does not bring prior direct facilities development experience, he has taken a deliberate, learning-oriented approach to facility planning by assembling and actively engaging a strong team of experienced advisors, architects, brokers, and owner's representatives. Burrus works closely with Nashville Incubator, owner's representatives, architects, and real estate professionals to understand site feasibility, zoning considerations, cost implications, and operational trade-offs as they relate to the school's academic model and long-term sustainability. His role includes synthesizing expert input, aligning facilities decisions with instructional priorities, and ensuring that facility planning remains disciplined, compliant, and mission-aligned.	Jim Leckrone brings extensive experience in school operations and launch readiness, with a particular focus on aligning facilities decisions to instructional, financial, and operational realities. As Founder and Operational Partner of The Gate School, Jim oversees operational feasibility, budget alignment, and readiness planning, ensuring that facilities choices support sustainable staffing models, daily schedules, and student services. Jim's role includes evaluating how potential sites impact operating budgets, transportation, food service, compliance, and staffing workflows, allowing the school to assess total cost of ownership beyond lease or construction costs alone. His experience leading school operations ensures that facilities planning is grounded in practical execution, reducing the risk of selecting a site that is technically viable but operationally misaligned. Jim will be integral to translating The Gate School's academic model into a facility that functions effectively from day one.

Board Members

Todd Dickson Founder & CEO of Valor Collegiate Academies	**John Webb:** VP at Pinnacle Asset Management	**Holt Madden** Senior Associate Boyle Investment Company
Provides governance oversight; reviews feasibility studies and financial models; ensures mission alignment and risk management.	Provides financial and real estate oversight; evaluates risk, long-term affordability, and contract terms.	Provides commercial real estate and leasing perspective; supports review of site options, market conditions, lease terms, occupancy costs, and long-term facility strategy.
Todd Dickson brings deep charter school leadership and governance experience as the Founder and CEO of Valor Collegiate Academies, which he has successfully expanded across three school facilities over time. His experience scaling a charter network includes navigating site selection, lease and build-out decisions, facility transitions, and long-term capital planning in a growing urban market. As a board member of The Gate School, Todd provides governance oversight of facilities strategy, drawing on firsthand experience managing the trade-offs between short-term facility solutions and permanent campus development. He supports the Board's review of facility feasibility studies, financial models, and risk assessments, helping ensure that major facilities decisions align with enrollment growth, instructional priorities, and long-term financial sustainability. Todd's perspective as a founder who has led multiple facility expansions strengthens the	John Webb brings deep experience in financial analysis, real estate oversight, and risk evaluation through his role as Vice President at Pinnacle Asset Management. His professional background includes assessing investment performance, underwriting risk, and evaluating long-term financial commitments, all of which are directly relevant to charter school facilities planning. As Treasurer and board member of The Gate School, John provides financial and real estate oversight for facilities decisions, reviewing lease terms, capital assumptions, and long-term affordability to ensure that facility commitments align with the school's operating budget and enrollment projections. He supports the Board's evaluation of contracts and financial models, helping identify and mitigate financial risk associated with site selection, renovation, or long-term leasing. John's expertise strengthens the Board's ability to make disciplined, data-informed facilities decisions that balance instructional needs with fiscal	Holt Madden brings commercial real estate and office leasing expertise through his role at Boyle Investment Company. As a board member, Holt supports The Gate School's facility search by providing practical insight into site evaluation, lease structures, market conditions, occupancy costs, landlord negotiations, and long-term space planning. His experience strengthens the Board's ability to evaluate facility opportunities with a clearer understanding of local real estate dynamics and the trade-offs between short-term incubation space and long-term facility strategy. Holt's perspective complements the technical support provided by the school's brokers, architects, legal counsel, and financial advisors by adding board-level real estate judgment to major facilities decisions.

Board's ability to make disciplined, mission-aligned facilities decisions.	sustainability, increasing the likelihood that The Gate School secures a facility that is both feasible and financially responsible over time.	

The Gate School Facility Partner Organizations

The Gate School Facility Team is made up of the following supporting partners:

- Strategic Advisors
- Owner's Representatives
- Real Estate Broker
- Architects
- Financial Advisors
- General Contractors
- Legal Representatives

Please see below for the specific organizations that The Gate School is partnering with to procure a facility. The specific team members supporting from each organization are listed in an additional chart below titled The Gate School Facility Team.

Strategic Advisors & Owner's Representatives
Nashville Incubator
Nashville Incubator recruits and supports school founders to launch high-quality public charter schools across Middle Tennessee, providing end-to-end support from early concept through launch and growth. To date, the incubator has supported multiple charter school launches, including guiding four schools through placement in incubation facilities that allowed them to open while securing long-term sites. Nashville Incubator has also supported schools through permanent facility development, including Aventura Community School's build-out of its permanent campus, providing strategic guidance across planning, coordination, and readiness phases. In addition to governance development, charter writing, and board support, the incubator offers hands-on facilities strategy support, helping founders navigate site identification, feasibility, zoning considerations, and early operational planning. This combination of incubation-space execution and permanent facility development experience makes Nashville Incubator a strong strategic partner for The Gate School, reducing facility risk and increasing the likelihood of securing a compliant, sustainable site aligned to the school's academic model and growth plans.
True North Advisory
True North Advisory is a Nashville-based real estate and construction advisory firm specializing in owner's representation, due diligence, and cost modeling for complex development projects. The firm brings deep experience across preconstruction planning, engineering review, budgeting, and contractor coordination, supporting clients through early feasibility analysis and execution planning. True North has worked across a range of commercial, nonprofit, and mission-driven projects, helping organizations assess site viability, understand total cost of ownership, and manage risk throughout renovation or construction. Their technical expertise and disciplined approach to cost control make them a strong fit to support The Gate School in

Strategic Advisors & Owner's Representatives
securing and executing a facility that is financially sustainable, compliant, and aligned with the school's long-term academic model.

The Gate School Facility Team

Strategic Advisors & Owner's Representatives	
Nashville Incubator	**True North Advisory**
Shelby Goodfriend: *Director of Facilities*	**Scott Gibson:** *Partner*
Supports site identification, zoning review, renovation planning, and operational compliance.	Leads due diligence, cost modeling, and owner's representation; coordinates architectural and contractor reviews.
Shelby Goodfriend is a strategic facilities advisor with experience in charter development, construction oversight, and state-level compliance. As Director of Facilities at the Nashville Incubator, she guides founders through site selection, due diligence, budgeting, design, and construction. She recently supported Nurses Middle College, Encompass Community School, and Invictus Charter School, in opening on time and under budget with no debt service and advises a nine-school portfolio on long-term facilities strategy. Shelby previously served as Director of Charter Schools for the Tennessee Department of Education, giving her a clear understanding of the compliance, safety, and operational requirements new schools must meet. Her construction background includes delivering five new launches, two expansions, and three renovations on time at The Escape Game, along with leading facilities and renovation work as a school operations leader. She also holds a Bachelor of Art in Interior Architecture. Shelby's combined experience allows her to provide founders with practical, cost-aware, and compliance-aligned guidance at every stage of the facilities process.	Scott Gibson is a civil engineer and solutions-driven real estate and construction leader with nearly 20 years of experience managing preconstruction, engineering, and project oversight for major regional and national development projects. He combines technical expertise with deep familiarity in construction planning, budgeting, and vendor coordination, helping school founders understand cost implications and feasibility from early due diligence through build-out. His ability to forecast risks, align project costs with mission priorities, and translate complex engineering details into actionable decisions will be integral to The Gate School's facilities strategy

Facility Search & Acquisition
Avison Young
Avison Young is a global commercial real estate advisory firm with deep experience supporting charter schools and nonprofit organizations through site selection, lease negotiation, and facilities strategy. The firm brings both national scale and local Nashville market expertise, enabling early-stage schools to navigate competitive real estate markets with discipline and speed. Avison Young's charter school support is centered on tenant and occupier representation, guiding schools through requirement definition, market search, financial

Facility Search & Acquisition	
modeling, RFP and LOI processes, negotiations, and move-in execution. Their structured approach helps schools identify viable options, evaluate total cost of occupancy, and avoid long-term facilities risk before committing to leases or acquisitions. The Nashville-based team supporting The Gate School includes senior leaders with decades of experience in tenant representation, capital markets, research, and advisory services. Collectively, this team has represented clients in billions of dollars of transactions and millions of square feet of leased space, with particular expertise advising mission-driven and education-focused organizations. Avison Young has provided facilities advisory and tenant representation services to a broad set of charter schools and education nonprofits, including Invictus Nashville Charter School, Nurses Middle College, The Rock Academy Charter School, and Celebree Schools, among others. This experience gives the firm direct familiarity with the constraints charter schools face around timing, financing, enrollment uncertainty, and regulatory requirements. Through this partnership, The Gate School will leverage Avison Young's market intelligence, negotiation expertise, and charter-specific experience to identify and secure facilities that are financially sustainable, operationally viable, and aligned to the school's long-term growth plans	
Jody Elder *Broker*	Leads property search, market analysis, site tours, lease negotiations, and zoning verification.
Jody Elder is a senior commercial real estate advisor at Avison Young with extensive experience supporting mission-driven organizations through complex site selection, lease negotiation, and facilities strategy. Based in Nashville, Jody brings deep local market knowledge and a disciplined, data-driven approach to helping organizations secure facilities that align with long-term operational and financial goals. Jody's work is particularly well-suited to early-stage charter schools navigating competitive real estate markets, compressed timelines, and uncertainty around enrollment growth. He supports clients through requirement definition, market analysis, financial modeling, RFP and LOI processes, and lease negotiation, with a focus on total cost of occupancy and long-term flexibility rather than short-term wins. Throughout his career, Jody has represented nonprofit, education, and institutional clients, coordinating closely with school leaders, boards, architects, and owner's representatives to ensure real estate decisions are grounded in feasibility and affordability. His approach emphasizes clear trade-offs, realistic assumptions, and transparent communication, helping leadership teams make informed decisions before committing to long-term obligations. Jody supports The Gate School by leading early site search and market analysis, advising on lease structures and deal terms, and coordinating closely with the school's architectural, construction, and financing partners. This integrated approach ensures that facility decisions are aligned with the school's academic model, growth plans, and financial capacity.	

Architectural Feasibility & Design
We anticipate that a formal RFP process will be required for selecting the architect for construction drawings to align with Tennessee public procurement requirements, applicable federal funding rules if used, and the school board's bylaws and purchasing policies governing transparency and competitive selection. To support an efficient transition into this process, we have established relationships with multiple qualified firms. For initial feasibility purposes, we

Architectural Feasibility & Design
do not anticipate requiring full construction drawings, as the associated cost is not proportional at this stage and conceptual or schematic-level documentation is sufficient for evaluation.
Provides supplemental feasibility and cost analysis for build-out options. Providing initial support with programming while site is being identified, process overview, conducts feasibility studies; evaluates building fit for instructional program; provides early design and cost guidance, leads space planning, renovation scoping, and school-design alignment to instructional priorities.
HMK Architects
HMK Architects PLLC is a Brentwood-based architecture firm with more than 26 years of experience planning and designing K–12 educational facilities across Middle Tennessee. The firm has extensive familiarity with public school standards, zoning and code requirements, life safety, ADA compliance, and regulatory approval processes, developed through decades of work with Metro Nashville Public Schools and charter schools. HMK brings particular strength in feasibility-first planning, supporting schools in evaluating potential sites and buildings before lease or purchase decisions are made. Their work emphasizes early identification of regulatory and physical constraints, realistic scope definition, and alignment between instructional vision, enrollment projections, and facility feasibility—an approach well-suited to early-stage charter schools. Most recently, HMK partnered with the Nashville Charter Incubator to design Invictus Nashville Charter School, which opened in August 2025. That project required close coordination among school leadership, contractors, and regulatory agencies to align educational programming, occupancy requirements, life safety standards, and schedule certainty for opening. If selected through the RFP process, HMK would support The Gate School through early facility feasibility analysis, including site and building evaluations, test fits, zoning and allowable use verification, life safety and occupancy analysis, and ADA review. HMK would also provide architectural design, documentation, regulatory coordination, and construction administration through occupancy and future phased growth, as appropriate. HMK's charter-specific experience, regional regulatory knowledge, and feasibility-driven approach exemplify the type of architectural partner The Gate School intends to engage through its facilities RFP process.
Logan Newton - Principal & Beth Kickirillo - Founding Principal
Logan Newton is an architect at HMK Architects with 13 years of experience supporting K–12 school facilities through early planning, site evaluation, and feasibility analysis. Logan provides overall project leadership and ensures alignment between a school's educational vision and architectural decision-making. His work emphasizes disciplined, feasibility-first thinking, helping school teams understand the real constraints and trade-offs that shape successful facilities outcomes. He previously served on the Metro Nashville Board of Zoning Appeals, where he developed deep expertise in zoning interpretation, regulatory processes, and entitlement risk. This experience brings added rigor to facilities planning, particularly in complex or uncertain site conditions common to urban charter schools. Beth Kickirillo is a senior architect at HMK Architects with 32 years of professional experience, including 26 years at HMK, leading the design and technical execution of K–12 educational

Architectural Feasibility & Design
facilities. Beth brings deep expertise in educational design and a strong command of the architectural and construction process. She is known for guiding project teams and school representatives through complex decisions with clarity, rigor, and attention to detail, particularly in environments where school leaders may be less familiar with facilities development.Her career includes decades of experience working with K–12 schools, where her commitment to technical excellence, thoughtful design, and disciplined execution has contributed to consistently successful outcomes.

Finance & Affordability	
Raymond James	
Raymond James Financial, Inc. is a Fortune 500 financial services firm with a nationally recognized Public Finance practice and a dedicated Charter School team focused exclusively on charter school financing. The team has completed more than 250 charter school transactions totaling over $5 billion, including extensive experience supporting start-up schools. Raymond James has financed a wide range of charter school facility projects, including ground-up construction, renovations, and adaptive reuse, using financing structures such as tax-exempt bonds, bank placements, and CDFI debt. Their approach emphasizes aligning facility scope, enrollment projections, and long-term financial sustainability. For The Gate School, Raymond James brings both national expertise and local knowledge, with lead team members based in Tennessee and deep familiarity with the state's charter school landscape and facility requirements. This experience positions Raymond James to effectively support the school's facility planning and development needs.	
Hanna Degen: *Vice President*	Conducts financial modeling, long-term affordability analysis, and financing pathway planning.
Hanna Degen is a Vice President in Raymond James' National Charter School Public Finance practice, based in Nashville. She brings six years of experience specializing exclusively in charter school finance, with a focus on debt structuring, credit analysis, and transaction execution. Over her career, Hanna has completed more than 70 charter school financing transactions totaling over $1 billion, supporting schools at all stages, including non-rated start-ups and growing networks. Her work spans a range of financing structures and facility types, reflecting deep familiarity with the financial realities and risk profiles charter schools face during planning and launch. Hanna is known for her analytical rigor and steady leadership in complex, high-stakes environments. She works closely with school leaders and project teams to navigate financial decision-making with clarity and discipline, particularly in early-stage contexts where assumptions must be tested and trade-offs made explicit.	
Vertex Education (formerly EdTec)	
Vertex Education, formerly EdTec, is a charter school services organization with deep expertise in supporting leaders through every stage of development, from application to long-term operational success. For more than 20 years, Ed Tec has partnered with charter schools nationwide, providing mission-aligned guidance in charter application development, business office and back office services, data compliance and performance analysis, grant writing, and strategic consulting to strengthen both emerging and established schools. The team's	

Finance & Affordability	
charter-focused insight helps school leaders navigate complex authorizer expectations, build sustainable systems, and make data-informed decisions.	
Christine Yang *School Finance Manager*	Aligns facility costs with budget projections; models sustainability through full enrollment.
Christine Yang serves as a School Finance Manager at Vertex Education (EdTec), supporting charter schools in budgeting, financial forecasting, and long-term sustainability planning. She works closely with school leadership to ensure facility costs, enrollment projections, and operational expenses remain aligned throughout the pre-opening and growth phases.	

General Contractors	
Moffit Builders	
Moffitt Builders, LLC is a Nashville-based commercial construction firm with experience delivering educational facilities and other commercial projects across Middle Tennessee. Founded in 2020, the firm has grown steadily and brings a practical understanding of the unique requirements of K–12 school construction, including life-safety and ADA compliance, school-year scheduling constraints, and phased work on active campuses. Moffitt Builders has completed new construction, renovations, expansions, and adaptive reuse projects for schools, including the conversion of existing commercial buildings into school facilities. The firm emphasizes careful planning, transparent communication, and close collaboration with school leaders, design teams, and local authorities to ensure projects are delivered on schedule and within scope. With dedicated project managers, superintendents, and field operations leadership, Moffitt Builders provides consistent oversight and quality control throughout all phases of construction. The firm approaches school projects as long-term partnerships, focused on delivering safe, compliant, and functional learning environments while minimizing disruption to students and staff.	
Ross Moffit *Owner*	Provides contractor-led cost estimates, constructability review, and renovation feasibility guidance during site evaluation.
Ross Moffitt is the Owner of Moffitt Builders, a Nashville-based commercial construction firm with experience delivering educational, religious, office, and institutional projects across Middle Tennessee. Ross brings a hands-on, execution-focused leadership style, shaped by more than a decade in construction management across both ground-up and adaptive reuse projects. His background includes leading complex renovations of existing buildings into school facilities, as well as additions and phased construction on active campuses where schedule discipline, life-safety requirements, and coordination with school leaders are critical. He is known for direct involvement in projects, clear communication, and financial transparency. Ross has overseen multiple school projects ranging from early childhood centers to full K–12 facilities, helping clients navigate tight timelines, constrained budgets, and evolving program needs with practical decision-making and accountability. Across his work, Ross emphasizes predictability, responsiveness, and trust. His approach reflects a commitment to being a long-term partner to schools, delivering not only quality facilities but a reliable and collaborative construction process from start to finish.	
DWC	

General Contractors	
Daniel Rebula *Senior Project Manager*	Provides contractor input on constructability, renovation feasibility, scheduling considerations, and early cost implications during site evaluation.
Daniel Rebula is a Senior Project Manager at DWC Construction with 10 years of commercial construction experience, supporting projects ranging from complex renovations to large-scale commercial and institutional facilities. Daniel brings a strong background in project coordination, scheduling, estimating, and contractor management, developed through experience with construction firms in both Charleston, South Carolina, and Nashville. His work spans interior and exterior renovations, adaptive reuse, and ground-up commercial projects, requiring close coordination across multiple trades and stakeholders. He is known for his steady communication style, organizational discipline, and ability to manage complex project details while maintaining strong client relationships. Daniel's combination of technical competence and interpersonal skill supports predictable execution in fast-moving environments with tight timelines and high expectations.	

Legal Counsel	
SRVH	
Sherrard Roe Voigt & Harbison, PLC is a full-service law firm based in Nashville, Tennessee, providing comprehensive legal services to businesses, nonprofits, and public entities. Established in 1981, the firm offers expertise in corporate and business law, contracts, real estate and development, construction law, employment law, dispute resolution and litigation, municipal finance, tax exempt organizations, and related legal areas. The firm's attorneys also advise and represent nonprofit entities, including charter schools and other educational organizations, on matters such as formation, governance, compliance, contracts, risk management, and operational legal issues. The practice combines deep legal knowledge with practical experience across complex commercial and regulatory matters to support clients' long-term stability and success.	
Will Pugh *Real Estate Attorney*	Reviews leases, contracts, zoning, and permitting; ensures compliance and risk protection.
Will Pugh is a real estate attorney at SRVH with experience advising clients on commercial leasing, zoning, and land use matters. He supports The Gate School by reviewing site-related agreements and confirming that real estate and permitting considerations align with regulatory requirements and risk management best practices.	
Thomas Hall *Construction Attorney*	Advises on construction contracts, compliance, permitting, and risk management for renovation work.
Thomas Hall is a construction attorney at SRVH with experience supporting commercial construction and renovation projects. He advises The Gate School on construction contracting, regulatory compliance, and risk allocation to ensure facility development is legally sound and aligned with best practices.	

The Gate School's facility search and development process is intentionally structured to include checks and balances across legal, financial, technical, and instructional considerations. No single

individual or partner is responsible for determining site feasibility or advancing a facility decision independently.

Real estate and zoning feasibility is reviewed by legal counsel (SRVH) to confirm land use compliance, permitting pathways, and contractual risk. Architectural and design advisors assess instructional fit, code compliance, and space programming. Independent commercial contractors provide early cost estimates, constructability review, and schedule input to ground feasibility assumptions in real construction realities. Financial partners independently model long-term affordability and sustainability before any site is advanced.

School leadership and board oversight serve as the final decision-making layer, reviewing findings across all disciplines and ensuring alignment with the school's instructional vision, safety standards, and financial plan. Once a site is deemed viable, the school will conduct a competitive RFP process at a minimum for design and construction services to ensure transparency, cost control, and vendor accountability.

This layered approach ensures that facility decisions are well-vetted, compliant with legal and safety requirements, and aligned with long-term operational sustainability.

Leadership Capacity and Decision-Making

Executive Partner Burrus Cox has intentionally built personal capacity in facilities strategy and decision-making, recognizing facilities as a high-risk, high-leverage area of charter school planning. His preparation has focused on developing the judgment needed to effectively lead, evaluate, and sequence facilities decisions alongside expert partners.

Facilities Training and Professional Development

Nashville Incubator – Facilities Professional Development

- Facility Partner Charrette: Building Your Team
- Defining the Facilities Team and Matrix of Responsibilities
- Facility Finance 101, led by the Raymond James Public Finance team
- End-to-end Facility Acquisition Process
- Frameworks for Assessing Site Viability

Finance and Real Estate Development (FRED) Conference

- A Lens into Educational Facilities Planning – 22Beacon
- Building an A+ Team – Facility Resource Center
- Selecting A+ Team Members – PSWrx
- State Charter School Facilities Explained – National Alliance for Public Charter Schools
- Financing the Future: Unlocking Capital for High-Impact Facilities – CFC Advisors
- 9-Step FRED Framework – Mike McGregor

Through this preparation, Burrus approaches facilities decisions with increased fluency in real estate, finance, and development processes. His role is to set direction, ask the right questions, evaluate trade-offs, and ensure facilities decisions align with The Gate School's mission, timeline, and financial capacity, while relying on specialized partners for technical execution.

Facility strategy is coordinated through regular, structured meetings. Burrus directly oversees the facility search and serves as the central point of accountability, with all facility-related vendors reporting through a single project management structure. Shelby Goodfriend, Director of Facilities at the Nashville Charter Incubator, supports this work by translating technical

information, pressure-testing assumptions, and serving as a neutral advisor focused on the school's long-term interests. Ongoing weekly strategy meetings with the Nashville Charter Incubator, as well as monthly facilities meetings with partners including True North Advisory and Avison Young, are used to evaluate sites, confirm zoning, validate budgets, and assess alignment with the academic program.

Decision-making authority is clearly defined. Burrus Cox is responsible for day-to-day facility decisions and advancing sites through the feasibility process. The Board of Directors serves as an active governance partner and is engaged in monthly facilities updates, which will increase in frequency as the school approaches opening. Any lease, purchase, or contract exceeding thresholds outlined in the Board's bylaws is reviewed and approved by the Board prior to execution. In addition, the school convenes monthly Operations and Audit Committee (OAC) meetings to review financial assumptions and risk, with increased cadence closer to opening.

This structure ensures that facility decisions are informed by expert input, grounded in clear criteria, and subject to appropriate leadership and board oversight.

Facility Search Criteria

As described in Question 44, all sites are evaluated using a facility feasibility rubric that screens for:

- **Program & capacity fit:** supports programming and enrollment needs
- **Legal & safety feasibility:** school use permitted; Group E conversion achievable; fire/life safety, ADA, and health requirements met without major structural reconstruction
- **Financial & timeline viability:** target lease ≤ $25/SF plus operating expenses of ~$4/SF; modeled to remain near 15% of revenue at scale; certificate of occupancy achievable by July 2027
- **Access & longevity:** predictable family access via major corridors and potential for multi-year occupancy or expansion

Using these criteria, the team conducted a citywide real estate scan and identified five viable school-suitable properties. Of those, three (Properties A, B, and C) advanced to full feasibility review.

The Gate School has access to a guaranteed incubation site that can support initial operations if needed. At the same time, the school is conducting an ongoing facility search with its facilities team to identify a long-term, permanent location that fully aligns with the school's instructional model, catchment area, and enrollment strategy.

The school has identified three viable incubation options that meet core safety, code, and operational requirements. While these sites provide near-term security, none are located within the school's proposed catchment area, reinforcing the importance of continuing the facility search to secure a permanent site that aligns with family demand, access, and the school's diverse-by-design model. This dual-track approach ensures both near-term feasibility and long-term alignment, allowing The Gate School to prioritize instructional quality and family access without compromising the launch timeline.

Viable Incubation Properties

	Property A	Property B	Property C

District	District 7	District 4	District 2
Zoning Land Use	RS7.5	CL	RM9
Education Permitted?	With Conditions	Permitted by Right	With Conditions
Current Occupancy	Educational Use	Educational Use	Educational Use
Site Visit Complete	Yes	Yes	Yes
Annual Lease Rate	$433,268.00	$ 267,346.80	$214,835.00
Lease Type	Triple Net	Full Service Gross (FSG)	
Property Taxes	2025 Taxes: $31,851.64	n/a (FSG Lease)	
Cost of Improvements	All properties are in compliance with current requirements for school occupancy and will only require cosmetic turnover upgrades, approx $100,000		
Feasibility Study	Complete	Complete	Complete
Long Term Viability	3+ Years	2+ Years	2 Years
Property Type	Single Site	Shared Property	Shared Property
Sq Ft Available	19,694	21,399	14,287
Discussed Lease?	Yes	Yes	Yes

Identification and Feasibility Milestones

- Five properties screened; three advanced based on zoning, access, size, cost profile, and ability to support discussion-based instructional spaces.
- Full site viability visits completed for each of the three top sites, including walkthroughs with architects, brokers, and advisors.
- Zoning and land-use alignment confirmed (Community Education permitted at all three sites).
- Landlords willing to lease for school use, with preliminary terms discussed on each option.

Technical Due Diligence Completed

- HMK Architects completed space programming, classroom layouts, and preliminary renovation budgets.
- Raymond James and Vertex Education (EdTec) completed affordability modeling, ensuring long-term financial viability under affordability targets.
- All three properties require light turnover work (~$100,000) which supports the school's strategy to use an incubation-year facility that minimizes upfront capital needs.

Rationale for Incubation Space

- Allows TGS to occupy a safe, compliant, school-ready building with minimal renovation time and cost.
- Protects budget while long-term expansion or relocation planning continues.
- Ensures TGS can open on time, even as enrollment grows and facility needs evolve.
- Established internal checks and balances so projected square footage, renovation scope, and long-term operating budget remain tightly aligned.

Readiness and Pathway to Securing a Facility

Based on the work completed to date, The Gate School has:

- A prioritized list of three viable, affordable properties
- Detailed feasibility and cost analyses
- Engaged landlords with preliminary lease terms already discussed
- A coordinated advisory team with deep charter, real estate, legal, and financial expertise
- A clear timeline and pathway to selecting and securing a compliant facility well ahead of Fall 2027

This combination of rigorous due diligence, expert support, and proactive leadership provides reviewers with high confidence that The Gate School will secure a facility that meets both immediate and long-term needs.

Transportation

Question 46: Describe the plan to provide daily transportation to students, if applicable. Detail whether the proposed school will provide its own transportation services, contract out for transportation, or a combination thereof. If the school will not provide daily transportation services to and from school, describe how students will get to and from school and how the school will address any transportation barriers for student attendance.

The Gate School will provide no-cost, daily transportation for students by contracting with an established school bus provider in Davidson County. Our goal is to ensure reliable, equitable access to the school while accommodating families across Bellevue and West Nashville. The Director of Operations is our designated Transportation Supervisor. They will oversee all transportation services, ensuring compliance, safety, and clear communication with families.

To ensure that transportation services are responsive to geography, enrollment patterns, and family needs, The Gate School will conduct an annual analysis of enrolled students' home addresses, enrollment density, major traffic corridors, and proximity to public transit and community hubs within the school's enrollment area. This analysis will inform route design, stop locations, and scheduling decisions to minimize ride times while maximizing accessibility for families with limited transportation options. Preliminary routes will be developed following initial enrollment commitments and finalized approximately 30 days prior to the start of school, with adjustments made as needed.

The Gate School will ensure transportation accommodations for students with disabilities, including wheelchair-accessible vehicles and individualized supports as required by IEPs and 504 plans (see question 47).

Bus Service Model

We will contract with a licensed bus service operating within MNPS boundaries. While The Gate School retains responsibility for route design and access planning, the contracted vendor will execute transportation services in alignment with school-defined expectations for equity, safety, and reliability. The transportation model will initially include:

- **Fleet Size and Budget Alignment:** Fleet size supports projected ridership rather than total enrollment. The Gate School assumes 50–60% daily ridership (consistent with MNPS districtwide patterns). TGS plans 2 buses in Year 1, 3 in Year 2, and 4 in Year 3, budgeted at $80,000 per bus with 2% annual inflation — totaling approximately $160,000 / $244,800 / $332,928 in Years 1–3 respectively (see Q57 budget narrative for the full ridership table and Tab [Years 1-5 Budget_PLAN], Row 52 of the budget template). The assumption will be refined through family transportation surveys, student address mapping, and vendor route analysis prior to launch.
- **Strategic central pick-up and drop-off locations**, selected based on student density, safety and visibility of stop sites, access to major roadways, and ease of access for families walking or using public transit
- **Bus monitors** on each bus, staffed by CTAs and paraprofessionals who receive a stipend for this duty.

- **Daily coordination** between the Director of Operations and the bus vendor regarding driver performance, safety expectations, route adjustments, and compliance with state and district transportation regulations.
- **Clear family agreements** outlining expectations around safety, pick-up procedures, and student conduct.

To select the best transportation vendor for our school, we will use a competitive Request for Proposal process. The Operations Partner will lead this process. The RFP will be made available to potential vendors through email and by posting it on our school's website. Our evaluation of proposals will focus on key factors such as pricing, the vendor's ability to provide the services we need, experience, and overall business practices.

Additionally, we will ensure that they are an approved vendor with the Tennessee Department of Education and meet all applicable state laws and rules. The final decision on the chosen vendor will be made by the Operations Partner, with final approval from the Board.

Daily Transportation Operations

- All routes and assignments will be managed in SchoolPass, enabling the school to track car riders vs. bus riders, ensure accurate rosters, and communicate changes in real time, including emergencies, delays, and weather related issues.
- The Director of Operations assigns supervision posts for the morning and afternoon bus arrival/dismissal window.
- A 20-minute car rider line will operate before and after school with clear traffic flow patterns to ensure safety and efficiency.

Addressing Transportation Barriers

For families with nontraditional schedules or for students needing extended-day options, The Gate School will partner with additional community providers:

- **YMCA** for before-care
- **Boys and Girls Club** for aftercare
  These partners will offer safe, structured programming with coordinated transportation where available.

Through geographic analysis, no-cost transportation, strong operational oversight, and strategic community partnerships, The Gate School's transportation plan is intentionally designed to support equitable access and consistent attendance for all families.

Question 47: Describe the plan to provide transportation to students whose individualized education plan (IEP) or 504 plan requires transportation to ensure the student receives a free and appropriate public education (FAPE) pursuant to 34 CFR § 300.34(c) and Section 504 of the Rehabilitation Act of 1973.

Required Transportation for Students with IEPs and 504s

The Gate School will provide transportation at no cost to any student whose IEP or 504 Plan requires it to ensure access to a Free and Appropriate Public Education (FAPE), pursuant to 34 CFR § 300.34(c) and Section 504 of the Rehabilitation Act of 1973 to and from school. When a student qualifies for specialized transportation, the school will coordinate directly with families,

the IEP/504 team, and contracted transportation providers to design an individualized transportation plan that meets the student's specific needs.

Transportation services will include appropriate accommodations such as wheelchair-accessible vehicles, specialized equipment, adjusted pick-up and drop-off locations, and trained personnel, as required by the student's plan. The school will ensure all transportation staff receive training in safety procedures, disability awareness, confidentiality, and compliance with federal and state regulations. The school will contract with qualified transportation providers who have experience serving students with disabilities and who meet all state safety and licensure requirements. Contracts will include performance expectations, compliance assurances, and protocols for communication with families and the school.

The Student Supports Partner will monitor service delivery, review transportation needs at each IEP or 504 meeting, and make adjustments when necessary to maintain safe, reliable, and compliant transportation for every eligible student.

If more students enroll with special transportation needs or transportation costs for students with special needs otherwise exceed our budgeted amounts, we will immediately modify the budget to ensure that all students receive all mandated transportation services.

Transportation will be provided to and from school and any school-sponsored activities as required by the student's IEP or 504 Plan.

Health and Safety

Question 48: Describe the plan for meeting the medical needs of students, including how the school will provide nursing services.

The Gate School will adhere to all policies and guidelines related to local, state, and federal school health services laws and process controls (e.g. standardized forms,incident documentation, emergency action plans) including but not limited to the The TN Office of Coordinated Health manual, IDEA, ADA, FERPA, OSHA, and HIPAA.

Below is an overview of our plan to support students with medical needs:

Year 1	Year 2	Year 3 and Beyond
Partners and Operations Staff (Day to Day Health Needs) Contracted nursing service, as needed, for situations that require a medical professional as a part of the student's Medical Plan		Full Licensed Nurse
Note: If The Gate School enrolls a student who needs a higher level of medical attention, we will adjust to ensure their needs are met with a contracted nursing service for a specified need (i.e. insulin shots during the day), based on the student's Medical Plan. The service would be on an as needed basis and only the hours needed to ensure the student's needs are met in Years 1 & 2.		

In years 1 and 2, The Gate School will utilize the Partners and Operations Team to handle day to day health needs, including basic first aid, symptom monitoring, comfort care, and parent communication. All Partners and Operations staff will complete MNPS medication training and Red Cross CPR training. This will enable those staff members to administer routine medication and handle day to day issues related to sickness. Anything beyond scope triggers (see below) will result in parent pickup or Emergency Medical Services, or contracted nurse. Contracted nursing services will be provided by a licensed RN (or RN-led provider).

Day to day health policies include:

- Promptly notifying parents/guardians if their scholar has a temperature of 100.4, experiences nausea, or has other conditions impairing his or her studies. When parents receive notification, their scholar must be picked up within one hour. If the parent is unavailable, the parent must contact another family member to pick up the scholar.
- Any scholar sent home for a fever, diarrhea, or vomiting may not return to school until 24 hours have passed since the last instance of illness.
- If a scholar requires over-the-counter medication during school hours (aspirin, cough drops, Tylenol, etc.), The Gate School trained staff can assist with administration as long as the scholar's parent/guardian has completed the proper Administration of Medication Form. Prescription medication, however, may not be given unless a scholar's healthcare provider has signed the Administration of Medication Form. This policy and the requirement to have a form on file apply to all medications. All medications must be brought to the office by the parent and under no circumstances should be handled by the child without the parent present. All prescription medications must be in original packaging from the pharmacy with corresponding labels.
- Anything beyond scope triggers parent pickup / EMS / nurse involvement.

In addition to our Partners and Operations teams, all athletic coaches and the PE teacher will complete CPR certification training.

The Gate School will also contract with a nursing professional service as needed in years 1 and 2 to perform the following duties:

- Complete Individual health plans for every student with diagnosed medical needs.
- If needed, come in during specific hours to administer any medication that requires a medical professional (insulin, etc.).
- Any other needs that require a medical professional as stated in students' individual health plans.

In year 3, the school will provide a licensed nurse on-site support to meet the medical needs of all students in accordance with applicable state and federal laws. A licensed school nurse will be on-site during school hours to provide care for students with acute illnesses and/or chronic conditions, administer medications, implement health plans, and respond to medical emergencies. The nurse will collaborate with families, physicians, and other healthcare providers to develop individualized health plans for students with chronic conditions, allergies, or other medical needs.

Concurrent with years 1 and 2, Partners and Ops staff will still keep updated with MNPS medication and CPR training every day with athletic coaches and the PE teacher keeping up to date on CPR training. All staff members will be trained on emergency procedures, and any student-specific health protocols as outlined in individual health plans. The school will maintain appropriate medical supplies and secure storage for medications. Ongoing monitoring and regular review of health plans will ensure that the school responds effectively to each student's medical needs and provides a safe and supportive learning environment.

Question 49: Identify the person or position responsible for school safety operations, detailing the responsibilities of this position, and providing the approach and timeline to develop a school safety plan in accordance with T.C.A. § 49-6-804 through T.C.A. § 49-6-808.

The Director of Operations, with support of the Operational Partner, will serve as the person responsible for school safety operations, overseeing all aspects of school safety operations. Responsibilities of this role include developing, implementing, and updating the Emergency Operations Plan (EOP), ensuring compliance with T.C.A. § 49-6-804 through § 49-6-808, coordinating safety drills and emergency preparedness training, conducting risk assessments, and serving as the primary contact with local law enforcement and emergency responders.

The Director of Operations is the day-to-day safety operations lead; the Operations Partner and/or Executive Partner retains decision authority for law enforcement engagement and board notifications.

Timeline to Develop and Implement the School Safety Plan:

- **May-July 2027:** In coordination with the Metro Nashville Public Schools Office of Emergency Management, the Director will draft the Emergency Operations Plan. The initial review of procedures will occur during Summer Professional Development.
- **June-July 2027:** Update the EOP to incorporate all relevant Tennessee laws and policies, finalize protocols for evacuation, lockdown, severe weather, shelter-in-place, and

reunification, and submit the plan to all required entities, including MNPS and local public safety agencies. Part of that plan update will ensure it matches aspects of the school building and that safety routes and key procedure maps are posted.

- **July 2027:** Share safety protocols with staff, students, and families through orientation sessions, including rigorous training with staff through practice of all procedures before the first day of school. Additionally, staff will complete all required annual trainings, including but not limited to Bloodborne Pathogens, Suicide Prevention, Sexual Harassment, and Mandated Reporter requirements and procedures.
- **Throughout the School Year:** Conduct regular drills and practice emergency procedures. Use professional development time to review and update staff on emergency protocols and school procedures. Continuous monitoring and periodic updates will ensure compliance and readiness for all emergencies. Keep all logs and records of drills current and in compliance with local policies through the Navigate 360 Emergency Management platform.

All procedures will be captured in the Gate School Family Handbook and the Personnel Handbook.

The Gate School Safety and Security policies will include but not be limited to:

- Control of building keys, security codes, and security systems.
- Restrictions on student access to classrooms, labs, other school facilities, and equipment unless there is appropriate supervision.
- Securing work areas when left unattended or at the end of the day.
- Actions taken for intruder(s) on property.
- Protocol for inclement weather, power outage, gas leaks, fire, threats, transportation accidents, earthquake, etc.
- Student weapon possession, drug possession, fighting, accident prevention and documentation of these instances.
- Traffic safety and parking controls.
- First aid, CPR and resuscitation orders, emergency medical care, blood borne pathogens, and infection control.
- Reporting of suspected child abuse/neglect.
- Sexual harassment.
- Establishment of alcohol/drug/tobacco/violence/weapons free environment.
- Indoor air quality. Safety inspections. Emergency alert codes. Assigned responsibilities during emergencies.
- School visitation policy/badge system/access control using (i.e. Raptor)
- Fingerprinting/background check as required by Tennessee law and board policy.
- Health and Safety orientation program.
- Development of OSHA compliant procedures for hazardous materials.

School Safety and Security

All staff, contracted workers, and volunteers working with The Gate School scholars must adhere to and follow all safety and security policies, including mandatory background checks through the Tennessee Bureau of Investigation. The Gate School faculty and staff must meet all State of

Tennessee certification requirements set forth for education professionals. No services can be delivered to students until all certificate documents have been obtained.

The Gate School's Executive Partner is in charge of securing assistance from law enforcement officials when deemed necessary to maintain order or security during the school day or during extracurricular activities. The Gate School's Executive Partner is required to notify The Gate's Board of Directors within 24 hours of any substantial building damage or criminal activity. The Board of Directors is authorized to sign a criminal complaint and press charges against any perpetrators of The Gate School.

School Safety Evaluation

The Gate School's Director of Operations conducts a school safety evaluation/audit once a year and on an as-needed basis, as applicable by law. Changes and modifications are promptly made based on feedback from this audit. The Gate School's emergency plan will be designed to ensure the safety of all students and staff during weather-related and other potentially dangerous situations.

Facility Compliance

The Gate School's Executive Partner is also charged with ensuring that the school facilities meet all codes and occupancy laws. The Gate School is in compliance with local and state building codes and ADA requirements for a safe and accessible building, and has been assessed for sanitation, fire, ventilation, and overall building safety. School facilities and grounds are assessed on a regular basis by local code officials.

Insurance

State law requires that charter schools have appropriate insurance coverage. Types of insurance should include, at minimum, workers' compensation, employer liability, property, professional liability, surety bonds pursuant to T.C.A. § 49-13-111(n), and sexual abuse. If the proposed school intends to have school athletics, additional liability coverage will be required. Sponsors should check with their authorizer to determine the necessary coverage amounts.

Question 50: Include, as **Attachment 8**, a letter of coverage from an insurance company that:

- Lists the types and corresponding amounts of insurance coverage the proposed school will secure; and
- States that the company will provide the required coverage upon approval of the charter application; and
- Includes provisions for assuring that the insurance provider will notify the Tennessee Department of Education within ten (10) days of the cancellation of any insurance it carries on the charter school, pursuant to T.C.A. § 49-13-107(b)(19).

Please review **Attachment 8**.

Food Service

Question 51: Describe the plan to offer food service to the students, including how a food service vendor will be selected or, in the alternative, how the proposed school will provide meals in-house, including food preparation, storage, service, and staffing.

The Gate School will provide daily breakfast and lunch through a contracted food service management company, overseen by the Operations Partner and Director of Operations, with final vendor approval by the governing board.

Food Service Model

- The school will participate in the National School Lunch Program (NSLP) and School Breakfast Program (SBP).
- Meals will meet all USDA and Tennessee Department of Education nutrition standards, food safety regulations, and civil rights requirements.
- The school will offer free and reduced-price meals to eligible students and will assess eligibility for the Community Eligibility Provision (CEP) once enrollment data are finalized.
- Vendors will be required to accommodate food allergies, medical needs, and disability-related dietary requirements in compliance with student IEPs and 504 Plans.

Food Preparation, Storage, and Service

- Meals will be prepared off-site or on-site by the contracted vendor, depending on final facility design and vendor capacity.
- The school will provide appropriate refrigerated and dry storage space, serving equipment, and food safety infrastructure in accordance with health department requirements.
- Breakfast and lunch will be served in the designated cafeteria or multipurpose space, staggered by grade levels to ensure efficient service, appropriate supervision, and minimal disruption to instruction.
- Multiple serving lines and clear procedures will be used to support timely meal distribution.

Vendor Selection and Oversight

- The food service vendor will be selected through a competitive RFP process led by the Operations Partner.
- We will use the TDOE School Nutrition[129] resources to evaluate items such as:
    - Compliance with USDA and TDOE requirements
    - Experience serving charter or public schools
    - Food quality, menu variety, and cultural responsiveness
    - Capacity to meet allergy and medical accommodations
    - Staffing plan and operational reliability
    - Cost effectiveness and financial transparency
- The governing board will review and approve the selected vendor contract.

[129] TDOE Nutrition

Program Oversight and Family Communication

- The Director of Operations will oversee day-to-day program compliance, vendor performance, and meal service operations.
- The school will manage family outreach, eligibility communication, and application support to ensure all students can access meals without barriers.

Food service participation, compliance, and vendor performance will be reviewed regularly as part of the school's operational monitoring process.

Start-up Plan

Question 52: Provide a detailed timeline of key milestones and deadlines that the founding team must meet to open the proposed school on time. Include key areas such as hiring, student recruitment, and facilities acquisition and who is responsible for overseeing progress and completion.

Pre-Opening Goals

Collectively, these pre-opening (July 2026 -July 2027) goals and milestones are designed to ensure that The Gate School opens in August 2027 fully enrolled, fully staffed, financially stable, and ready to implement our model with fidelity from day one.

Work Stream	End of Pre-Opening Goals	Owner	Support
Operations	• Meet 95% or better of authorizer goals (ongoing)	Operations Partner	Director of Operations
Facilities	• Facility has U&O permit by July 1st, 2027 • Construction/improvements are completed at/or under budget • Facility is ready for staff & students by day 1	Operations Partner, Board	Executive Partner, Nashville Incubator
Finance	• Pre-operational budget revised and approved by December 31st, 2026 • Year 1 operating budget approved by June 30th, 2027 • 30 Days cash on hand by July 1, 2027	Operations Partner	Vertex Education (EdTec) Board
Fundraising	• Secured ≥ 1 million in start up funding & have strong strategy for continued fundraising	Executive Partner	Board, Operations Partner
Student Recruitment & Enrollment	• Fully enrolled by May 1, 2027		Culture Partner
Talent (Hiring & Staff Development)	• Fully hired by June 30th, 2027		Operations Partner
School Design (Academics & Culture)	• Academic and Culture Playbooks are complete and articulate the vision, systems, and routines for all staff by April 1st, 2027		Culture Partner
Governance	• Board Year 1 Training complete		Operations Partner, Nashville Incubator

Pre-Opening Benchmarks / Milestones

The Gate School will revise this detailed start up plan as needed to align to authorizer expectations upon approval.

Operations		Lead: Operations Partner
Deadline	Milestone	Owner(s)
7/31/2026	• Procure insurance providers to ensure protection for TGS community upon authorization (e.g general liability, property, workers comp, student accident)	Operations Partner
8/31/2026	• Build detailed operations readiness checklist for start up (i.e. more detailed list of action steps)	
10/31/2026	• Select student SIS & academic data platform	
11/30/2026	• Post RFP for food service	
2/28/2027	• Finalize selection of food service vendor	TDOE to approve
2/28/2027	• RFP & selection for IT vendor	Operations Partner / Board to approve as required
2/28/2027	• RFP & selection for transportation vendor	
3/31/2027	• All FF&E is Purchased	
4/30/2027	• RFP & selection for janitorial	
5/31/2027	• Create emergency systems and plans	Director of Operations
6/30/2027	• Create transportation routes and any necessary supporting information re: bus procedures for families.	
7/15/2027	• Import students into SIS system and create plan to keep up to date with enrollment /roster shifts	

Facilities	Lead: Operations Partner Support: Executive Partner, Board & Nashville Incubator
Note: To set ourselves up for a longer runway, several critical facilities milestones will be completed before this start up plan begins in July 2026. The Gate School will hire a broker, owners rep, and architect early in 2026 and start searching for viable sites in the Spring of 2026. Please see question 45 for more detail on the process and status of our facilities team.	

Deadline	Milestone	Owner(s)
Prior to LOI	● Feasibility study complete on preferred and backup site	Operations Partner
7/1/2026	● Letter of Intent (LOI) signed for one preferred site and one back up site, begin lease negotiations	Operations Partner, Board
9/30/2026	● Release design to begin Construction Document Set	Operations Partner
9/30/2026	● Sign & Execute Lease	Operations Partner, Board
10/1/2026	● Begin General Contractor RFP process, with selection occurring 30 days from process start	
12/1/2026	● Construction Document ("CD") set in permitting	Operations Partner
3/1/2027	● Construction begins *(*adjusting this date as needed based on final scope of improvements)*	
4/30/2027	● Create a plan for assembly of furniture, etc. based on the timeline of building move-in and occupancy	
5/15/2027	● Schedule all final tech installs and safety checks	
6/15/2027	● Final punch list completed	
7/1/2027	● Receive final U&O Permit	

Finance (Lead: Operations Partner) **& Fundraising** (Lead: Executive Partner)		
Deadline	Milestone	Owner(s)
7/31/2026	● Sign contract with back officer provider upon authorization	Operations Partner
7/31/2026-Ongoing	● Meet monthly with back office provider	
7/31/2026	● Develop Tennessee-compliant Chart of Accounts aligned to TGS's budget categories, TN DOE requirements, and federal funding codes and have the board approve	Operations Partner, Vertex Education (EdTec), Board
8/31/2026	● Board approval of financial policies	Operations Partner, Board
8/31/2026	● Create planning year fundraising strategy aligned to current budgetary needs	Executive Partner
8/31/2026	● Set-up TGS bank accounts	Operations Partner
9/30/2026	● Establish a financial reporting calendar, including monthly	Operations

	budget-to-actual reports, financial dashboards and clear thresholds for when adjustments are required.	Partner; Board Finance Committee
9/30/2026	• Revise funder pitch materials	Executive Partner
9/30/2026-8/1/2027	• Monitor progress towards fundraising goals and review at least quarterly to adjust strategies as needed (e.g. search for new grants, add additional fundraising events)	
12/31/2026	• Revise pre-operational budget based on updated grant assumptions	Operations Partner, Vertex Education (EdTec)
4/30/2027	• Draft Year 1 budget	
6/30/2027	• Board Approved budget before fiscal year begins	Operations Partner, Board

Student Recruitment & Enrollment	Lead: Ops Partner Support: Executive/Culture Partner	
Deadline	Milestone	Owner
8/31/2026	• Develop student recruitment & marketing plan	Operations Partner
8/31/2026	• Build an enrollment tracker or select vendor tool to track overall pipeline and applications against targets	
08/31/2026	• Submit Lottery plan and procedures to authorizer	
08/31/2026	• Build detailed recruitment calendar that includes community events, camps, tutoring, and key marketing routines to ensure steady and consistent recruitment efforts throughout the pre-opening timeline	
9/30/2026	• Create enrollment application	
10/31/2026	• Publish application process and materials on website	
10/31/26-1/31/2027	• Launch application marketing campaign (social media, advertisements, mailers) to build broad awareness	
11/1/2026-1/15/2027	• Host monthly family information sessions about the Gate School model and application process	Executive Partner, Operations Partner
12/31/2026	• Family handbook finalized	
2/1/2027	• Execute Lottery	
2/28/2027	• Send school acceptance emails, mailers & phone calls	Culture Partner
3/1/2027	• Enrollment Stepback as a partner team to identify # of open seats and revise strategic plan to confirm admitted families and recruit additional families as needed to meet targets	All Partners
3/15/2027	• Launch spring enrollment strategic plan: targeted outreach to incomplete applications, family follow-up calls, and community partner referrals to meet targets	Ops Partner, Team supports
3/15/2027 - First day of School	• Execute admitted families communication strategy to maintain connection throughout the spring and summer (e.g. mailed welcome letter, save the date for orientation, monthly newsletter)	Ops Partner, Team supports

5/1/2027	● Reach full projected enrollment with confirmed commitments; maintain active waitlist through opening to proactively manage any shifts in enrollment	Executive Partner
5/31/2027	● Launch student records request	Operations Partner
6/30/2027	● Pre-opening readiness review with authorizer	
7/31/2027	● Host Family Orientation	All Partners

Talent (Hiring & Staff Development)		Lead: Executive Partner
Deadline	Milestone	Owner(s)
7/1/2026	● Approve job description and determine annual performance measures for Executive Partner	Board
7/1/2026	● Review and set compensation for the Executive Partner	
7/31/2026	● Hire Executive Partner	
8/31/2026	● Draft employee handbook	Executive Partner, Operations Partner
9/30/2026	● Create Staff Recruitment & Hiring strategic plan (with clear benchmarks)	Executive Partner
9/30/2026	● Hiring policies and procedures final; including system for background checks and verifying licensure through TBI and TNCompass	
10/31/2026	● Build a hiring tracker or select vendor tool to track hiring against targets	
10/31/2026	● Finalize Job Descriptions and hiring guidebook for Y0 and Year 1 roles (e.g. rubrics, interview tasks/prompts, etc)	
11/15/2026	● Finalize and approve employee handbook	Executive Partner, Operations Partner, Board
11/15/2026	● Culture Partner Role Posted	Executive Partner
12/15/2026	● Finalize payroll systems for the first team hires	Operations Partner
1/1/2027	● Post and launch recruitment for all 27-28 instructional roles (e.g. Senior, Mid, & Junior Associates)	Executive Partner
1/1/2027-Ongoing	● Ensure staff complete all employee information forms	Operations Partner
1/1/2027-Ongoing	● Complete background checks for all employees and verify licensure for all certified employees	
2/28/2027	● Post and launch recruitment for front office manager	
3/31/2027	● Create staff coaching and development plan	Executive Partner

3/31/2027	● Create summer staff training agenda and division of responsibility	
3/31/2027	● Confirm contracts or external support needed for planning and/or execution of Summer PD vision (e.g. Ensworth)	
4/30/2027	● Negotiate and sign agreement for contracted services (e.g. school nurse, related services)	Operations Partner
4/30/2027	● Design year long staff PD calendar	Executive Partner
6/30/2027	● Session plans and materials for summer staff training finalized	All Partners
7/1/2027	● Set up staff benefits	Operations Partner
7/12/2027-7/30/2027	● Facilitate staff summer PD	All Partners

School Design (Academics & Culture)	Lead: Executive Partner / Support: Culture Partner	
Deadline	Milestone	Owner(s)
9/1/2026	Start drafting TGS Academic playbook to clarify the instructional vision and practices that will support all instructional staff to achieve academic excellence. The academic playbook will include: ● Final curriculum map ● Vision of Excellence for each course ● Teacher planning and intellectual prep routines and templates ● Core testing routines and schedules ● Academic data analysis routines ● Harkness Method Vision or Excellence and best practices *(adapted from Ensworth)* ● UDL Framework overview and strategies to support all learners *(adapted from Diverse Learners Cooperative resource)*	Executive Partner
12/31/2026	● Finalize daily and weekly schedule	Executive Partner
12/31/2026	● Academic playbook final	
1/31/2027	Start drafting TGS Culture playbook to ensure a strong, clear, and user friendly manual for all staff members to work collectively towards our vision. The culture playbook will include: ● Final vision for School Culture ● Schoolwide expectations & core policies ● Best practices for building strong student-teacher relationships ● On Path Behavior Matrix and Path Points system ● Path Support cycle for classroom management best practices ● Detailed culture roles & responsibilities	Culture Partner
2/1/2027	● Finalize 27-28 Academic Calendar	Executive Partner
3/1/2027	● Create RTI Resource guide for instructional staff, including vision for excellence for RTI block and instructional materials	
3/1/2027	● Order textbooks and curricular materials	
4/1/2027	● Create and launch TGS's Child Find Plan aligned to IDEA and TN	

	DOE requirements, including referral process, parent communication, and evaluation timelines	
4/1/2027	● Culture playbook final	Culture Partner
5/1/2027	● Start process to identify special education and EL population for founding class of students	Executive Partner
5/1/2027	● Establish TGS's EL Identification & Service Plan	
6/1/2027-Ongoing	● Request IEP records; and any ILP supports	Executive & Operations Partner
7/1/2027-Ongoing	● Review existing IEPs and ILPs to begin planning student supports	Executive Partner
7/31/2027	● Define and plan all required supports for all students with IEPs or ILPS	

Governance		
Deadline	Milestone	Owner(s)
June 2026 +	● Execute monthly board meetings	Board
8/30/2026	● Finalize governing board member role & relationship between board members and Executive partner	Board
8/1/2026-9/30/2026	● Engage in annual board training	Board Chair
12/31/2026	● Recruit additional board members aligned to procedures outlined in question 37.	Board

Question 53: Describe contingency plans for common startup challenges including:

- Not meeting enrollment targets;
- Not meeting fundraising goals;
- Hiring challenges; and
- Facility delays.

Response to Potential Enrollment Gaps

Owner: Executive Partner **Support**: Culture Partner

Successful recruiting and enrolling our first class of students is work that is already underway at The Gate School and a top priority in our start up planning. An enrollment gap jeopardizes financial health, program quality, community credibility, and alignment to mission. It is one of the highest-leverage risks for new schools and must be anticipated and mitigated.
If our recruitment efforts (see question 9) fall short of our goals, we've established the following two layer contingency plan.

If enrollment gaps are 15% or less:

- Adjustments of pre-opening funds that may be shifted to support in our budget adjustments
- Prioritize a strategic goal to backfill seats and close enrollment gaps by January 1st. The partner team will work together to:

- o Conduct an analysis of our current pipeline to identify possible leads, patterns and potential root causes in stalled out leads (i.e. they never attended an event so may not have a first hand experience with the team yet)
- o Prioritize targeted outreach to existing leads that did not apply or accept their seat through personal phone calls and invitations to a school tour
- o Explore new sources of lead generation to add to our pipeline. We will customize our strategies aligned to the data on those that have been highest impact in our initial recruitment efforts, but are likely to include:
  - Social media posts that advertise open seats and call to action to apply
  - Direct mailers to families who have shown interest
  - Tabling at local community events (e.g. farmers markets, family friendly events, local church sponsored event)
  - Canvassing
  - Personal phone calls for prospective families to ask questions about the model
- o Test new recruitment strategies that are possible with a now open school community such as:
  - School Tours that offer families the opportunity to see and experience The Gate School in action with students and teachers now present
  - Direct ask to existing Gate School families and core community partners for referrals
  - Advertising our school events to community partners for a wider net of active engagement at schools sponsored events

If enrollment gaps exceed 15%:

- In addition to steps named above we will consider downsizing to three cohorts of students (instead of 4) and adjust our staffing accordingly to save on personnel costs. This adjustment would save at least 2 full time positions, without negatively impacting the student experience or compromising our model.
- We would also prioritize fundraising efforts to close the short term gaps for year 1, while simultaneously working to strengthen enrollment for year 2. See below for strategies we would use to prioritize raising additional funds.

Response to potential fundraising gaps
Founding Team Owner: Executive Partner **Support**: Operations Partner, Board Finance Committee

The Gate School is in progress for several significant start-up grants (Charter School Growth Fund, New Schools Venture Fund and Charter Schools Program) and we will know the outcome by **June 2026.** If we are not awarded one or more of these grants, we anticipate a potential startup shortfall of approximately $150,000–$250,000 across Years 0 and 1. In that case, we will begin implementing the contingency plans below to maintain financial viability while protecting the core elements of The Gate School model.

- **Planning Year Staffing Adjustments:** Modify our Pre-Operational Budget by delaying the hire of our Culture Partner from January 1st 2027 to July 1st 2027, generating an estimated savings of $50,000–$60,000.

- **Increase private fundraising efforts** including adding new possible mission aligned donors to our pipeline, hosting fundraising events, and asking our board finance committee for support.
- **Re-apply to major start up grants** (e.g. NSVF, CSGF, CSP) in the next cycle taking up lessons learned and feedback from our first application.
- **Invest in research and apply for additional grant opportunities**
- **The Executive Partner reports quarterly** to the board Finance Committee on fundraising progress and triggers additional cost-containment measures if gaps remain.
- **If needed, delay or phase in select nonessential purchases** (e.g., flexible furniture, certain technology upgrades, or external consultants) to Year 2 so that we do not reduce staffing, core instructional materials, or special education services.

Response to potential hiring challenges

Founding Team Owner: Executive Partner **Support**: Operations Partner, Culture Partner

We understand that challenges threaten the school's ability to deliver on its instructional model, support students effectively, maintain a strong culture, and meet compliance obligations. The Gate School model is teacher centered and in order to achieve our vision we must have both proactive staff recruitment strategies (question 42) and thoughtful contingency plans.

- **Culture Partner:** Our third founding role will play a pivotal leadership role in bringing the vision of the Gate School model to life and finding the right leader for this role is critical. If our initial pool of candidates does not meet the bar we will step back on the hiring process, revise our process based on lessons learned and delay the start date of this role from our original timeline of January 1st, 2027. Getting this role right is a top priority and we are prepared to extend our search and invest resources in this role as needed, including hiring a search firm if we do not find a strong candidate by April 1st, 2027.
- **Associate Roles:** Our strategic staffing model reduces the number of teacher ("associate") roles that we need to hire from the start (from 7 to 5).
- **Stepback frequently & Adjust course:** The executive partner and operations partner will conduct monthly hiring progress check ins to analyze trends and identify which recruitment strategies are yielding the best results so that we can invest more in those approaches and add new strategies such as:
  - o Offer or increase signing bonuses for traditionally hard to staff roles (e.g. Special Education Senior Associate)
  - o Track lead sources carefully to identify high-performing job boards and focus our resources only on the most effective platforms and boost only on those with the best yield.
  - o Offer referral incentives to staff members already hired. Great teachers often know other great teachers and our first round of mission align staff can be a great source of recommendations for remaining roles.
  - o Targeted asks for support to local organizations we've already partnered with (e.g. NTR) to clarify specific areas where we have hiring gaps and ask for their support and referrals. Ask them to support by circulating urgent vacancies, advising on competitive compensation, and possible short-term placements / residents.

- o Adjust our marketing approach and strategies to increase a wider audience, such as paid ads or marketing consultant support for high value videos or advertisements
- o Leverage tools like LinkedIn Recruiter or Fetcher to source candidates and initiate contact with strong talent who might not otherwise find us directly

- **Adjusting Staff Development:** If our associate hiring ends up with a higher percentage of novice teachers than anticipated, but who meet the minimum qualifications and are mission aligned, we can adjust our approach to developing staffing in the first semester. Given the unique approach to staffing and precedent for partners and senior associates actively teaching and modeling excellence, we would leverage this opportunity to ensure a more scaffolded roll out of full classroom responsibilities for novice teachers such as co-teaching the first month of school to thoughtfully onboard and ensure high quality learning for all students.

Response to potential facilities delays
Founding Team Owner: Operations Partner **Support**: Facilities Team (see question 45)

We know that facilities challenges are one of the most common reasons why a new start charter does not open on time and therefore The Gate School is intentionally starting the search early and planning specific back-up viable sites to mitigate our overall risk of delay.

- **(Plan A) Start with local incubation sites:** In order to minimize the risk from the start, our site search begins with buildings where schools are currently incubatoring and will be transitioning to their long term sites before the 27-28 school year. We have three sites that fall into this category, creating a margin of error if one of these schools needs to stay in their building longer than currently planned.
- **(Plan B) Expanded Search:** Our search process expands proactively beyond the incubation sites and as of January 2026 we've engaged a broker to help us identify back up viable site options. Our goal is to source at least two viable options by 6/30/2026 through this partnership, giving us a minimum total of 5 viable site options one year before launch. All sites will undergo full viability studies with appropriate vendors.
- **(Plan C) Facilities Step back:** As a founding team we have an internal deadline to confirm our site no later than November 30th, 2026. If a lease is not signed by this date, we will stepback to reflect on the contingency options below and determine our course of action.
  - ○ If we are close to confirming a site and need more time for viability studies or lease negotiations, we can extend our search window by 30 days and step back at the end of December. Our timeline is intentionally early to allow for some flexibility if construction needed on a confirmed site still fits within our timeframe.
  - ○ If all possible sites have fallen through and/or are not financially viable we will explore additional options that have educational use.
- **(Plan D) Construction Delays:** If construction were to be the cause of delay we would explore one of the following possible options that could work with the size of our school in year one.
  - ○ If the delay is short we could move summer staff training and family orientation to an off site space to allow up to 3 additional weeks for construction to wrap
  - ○ Short term co-location with another local charter school that has available space
  - ○ Short term co-location with a community partner that has available space
  - ○ Purchasing modulars to offer safe classroom alternatives

Operations Capacity

Question 54: Based on the team identified in **Table 4,** describe the sponsor's team's individual and collective qualifications for implementing the operational plan successfully. Identify any gaps in the sponsor's team and describe plans to fill those gaps with future hires. The discussion of both current team capacity and future hires should include a discussion of capacity in areas such as the following:

- Professional development and performance management;
- Student health;
- School safety and security;
- School operations such as food service and transportation; and
- Facilities acquisition and management.

The Gate School's operational plan is led by a founding team with deep experience executing complex school operations and a clear, phased approach to building additional capacity as enrollment grows. In Year 1, operational responsibility is intentionally concentrated to ensure coherence, accountability, and rapid decision-making, with additional specialized roles added in Years 2 and 3 as the school scales.

Year 1: Operational Leadership and Capacity

Operations Partner: Jim Leckrone

Jim Leckrone serves as the school's Operations Partner and brings extensive, directly relevant experience in school operations, facilities management, student safety, personnel systems, and compliance. As Founding Principal and School Director of East End Prep, Jim has spent more than a decade overseeing the daily operational execution of an 865-student K–8 charter school.

His operational responsibilities have included:

- Facilities acquisition, renovation, safety compliance, and long-term facilities planning
- School safety systems, crisis response protocols, and supervision structures
- Coordination of food service and transportation providers
- Budget development, financial controls, and vendor management
- Staffing, scheduling, onboarding, and performance management systems

This experience demonstrates the capacity to successfully execute The Gate School's operational plan during its launch year without overextending staff or systems.

Executive Partner: Burrus Cox

As Executive Partner, Burrus Cox plays a critical role in ensuring alignment between instructional priorities and operational decision-making. While Burrus's primary responsibility is academic leadership, his role includes shared accountability for operational outcomes that directly impact teaching and learning. Specifically, Burrus:

- Collaborates with the Operations Partner on scheduling, staffing models, and time allocations to protect instructional priorities such as co-planning, intervention blocks, and teacher collaboration
- Participates in budgeting decisions to ensure resources are aligned to academic goals and student needs
- Co-leads leadership team meetings where operational decisions are reviewed through an instructional lens

This partnership structure prevents the common disconnect between operations and instruction by ensuring that operational systems exist explicitly in service of the school's academic model.

Identified Operational Gaps and Planned Capacity-Building

While the founding team brings deep experience in designing and overseeing high-quality operational systems, additional capacity is required to manage daily operational execution as the school launches. As The Gate School transitions from planning into full daily operations, dedicated, site-based roles are necessary to ensure that systems are implemented consistently and reliably. The Operations Partner's role is primarily focused on building operational structures, compliance systems, vendor relationships, and long-term planning. To support effective execution of these systems at the building level, The Gate School will add execution-focused roles in Year 1 responsible for day-to-day operational management.

Year 1 Supporting Staff [To Be Hired and/or Contracted]

Director of Operations: Provides day-to-day execution of the school's operational systems, including facilities readiness, safety procedures, food service and transportation coordination, attendance and compliance processes, and vendor management. This role ensures consistent, reliable daily operations and allows the Operations Partner and Executive Partner to focus on systems oversight, compliance, and alignment to instructional priorities.
Front Office Coordinator: Provides daily operational support including attendance, records management, family communication, food service coordination, transportation coordination, and front-line logistics. This role allows senior leaders to focus on systems oversight, compliance, and strategic execution.
School Nurse (Contracted): In Years 1–2, The Gate School will ensure student health needs are met through clearly defined health procedures, trained staff supports, and established emergency response protocols, with consultation and/or contracted clinical support as needed, until the school adds a full-time on-site nurse as enrollment approaches full scale in Year 3.

Year 3: Operational Capacity Expansion

As The Gate School approaches full enrollment, additional operational capacity will be added to support increased staffing, enrollment volume, and student needs. These roles are designed to ensure operational continuity, responsiveness to families, and consistent implementation of systems as the school scales.

Director of Talent and Enrollment: Provides operational management of staff recruitment and student enrollment systems, with direct responsibility for recruiting students and families. This role manages outreach and enrollment workflows, maintains reliable hiring pipelines, coordinates onboarding processes, and serves as a primary point of contact for families throughout the enrollment process, allowing senior leaders to focus on instructional leadership and systems oversight.

School Nurse (Full-time Hire): Provides on-site student health services and manages daily health-related procedures, documentation, and family communication. This role ensures timely response to student medical needs and supports compliance with health requirements as enrollment reaches full scale.

Operational Competencies

Across Years 1–3, the sponsor team demonstrates increasing capacity in:

- **Professional development and performance management** through structured evaluation systems, coaching frameworks, and HR leadership
- **Student health and safety through phased staffing**, established protocols, and eventual on-site nursing services
- **Food service and transportation coordination** through experienced operational leadership and front office systems. The school will monitor food service and transportation providers through defined service expectations, routine check-ins, and documented issue-resolution processes to ensure reliable service, compliance, and responsiveness to families.
- **Facilities acquisition and management** through proven leadership in charter facility planning and management in Davidson County

The Gate School's sponsor team brings strong initial operational capacity, anchored by a proven charter school founder, and a transparent, phased plan to address known gaps as enrollment grows. By intentionally aligning operational leadership with instructional leadership, the team ensures that systems, staffing, and resources consistently support the school's academic mission rather than compete with it.

Question 55: Explain how organizational health will be measured, including performance in pre-operations, during early years, and as an established organization. If the board determines a need to intervene regarding organizational performance, what form(s) would that take?

The Gate School defines organizational health as the school's ability to execute its mission with fidelity while maintaining strong operations, financial sustainability, and a healthy adult culture. Organizational health will be measured through clear, phase-specific indicators during pre-operations, the early years of operation, and as the school becomes an established organization. The Board of Directors plays an active oversight role throughout all phases, using data to monitor performance and intervene when necessary.

The Executive Partner is responsible for monitoring pre-operational success indicators and reporting progress to the Board through a standing dashboard, created by the Operations Partner, and narrative update at each board meeting.

Pre-Operations (Year 0: June 2026–July 2027)

During this time period, organizational health is measured by progress against clearly defined launch benchmarks across operations, facilities, finance, enrollment, talent, and governance. These indicators are tracked through a comprehensive startup plan reviewed monthly by the leadership team and Board.

Pre-Operations indicators include:

- **Operations & Compliance:** Meeting 95% or more of authorizer-required benchmarks and on-time submission of required deliverables.
- **Facilities Readiness:** Facility secured on schedule; construction completed on time and on or under budget; issuance of a valid Use & Occupancy permit by July 1, 2027.

- **Financial Health:** Board-approved operating budgets; achievement of at least 30 days cash on hand by July 1, 2027; quarterly fundraising progress against targets.
- **Enrollment:** Full projected enrollment with confirmed commitments by May 1, 2027 and a maintained waitlist.
- **Talent Readiness:** All Year 1 staff fully hired by June 30, 2027; completion of summer professional development prior to opening.
- **School Design:** Academic and culture playbooks finalized and staff-ready by April 1, 2027.
- **Governance:** Completion of Year 1 board training and establishment of clear roles, decision rights, and reporting structures.

The Executive and Operations Partners maintain a living readiness dashboard aligned to these benchmarks. Progress is reviewed monthly with the Board, allowing for early identification of risks and corrective action well before opening. The purpose of pre-operations monitoring is to ensure the school opens fully prepared, so that Year 1 oversight can focus on performance rather than startup execution.

Early Years of Operation (Years 1–3)

In the early operational years, organizational health is measured through a combination of academic, operational, financial, and people-centered indicators.

Key indicators include:

- **Academic and Mission Outcomes:** Student achievement and growth data; progress toward mission-specific goals related to independence, communication, academic excellence, and high school readiness.
- **Operational Effectiveness:** On-time and compliant reporting; enrollment stability; attendance; execution of safety, food service, transportation, and facilities systems.
- **Financial Sustainability:** Balanced budgets; adherence to financial policies; cash flow monitoring; progress toward fundraising targets.
- **Staff Health and Stability:** Teacher retention; performance evaluation results; staff satisfaction and engagement measures.
- **Family and Community Trust:** Family satisfaction surveys and participation indicators.

The Board reviews a standard performance dashboard at each meeting, with deeper quarterly reviews tied to academic results, financial performance, and staff retention trends. If any key organizational health indicator falls below target for two consecutive reporting cycles, the Board initiates a formal intervention review.

Established Organization (Year 4 and Beyond)

As The Gate School matures, organizational health is measured by long-term sustainability and coherence:

- Consistently strong academic performance and growth
- Financial stability and clean audits
- Stable leadership and staff retention
- High family satisfaction and strong enrollment demand
- Continued alignment between operations, culture, and instruction

These measures allow the Board to assess whether the school is not only successful, but durable.

Board Oversight and Intervention

The Board maintains active oversight through monthly reporting, quarterly performance reviews, and annual goal setting with school leadership. If data indicate that organizational health is at risk, the Board intervenes using a tiered approach that is proportional to the issue, aligned to root cause, and time-bound. Interventions are organized across five categories, each tied to clear performance signals.

- Requiring a targeted improvement or recovery plan with clear timelines and metrics
- Increasing monitoring frequency and requesting additional reporting
- Authorizing external coaching or technical assistance (e.g., finance, operations, talent)
- Adjusting strategic priorities, budgets, or staffing plans
- Conducting leadership evaluations and, if necessary, restructuring leadership roles

These interventions are designed to be proportional, data-driven, and focused on restoring strong execution while preserving the integrity of The Gate School's mission.

Below is a sample intervention framework that identifies potential triggers and potential board actions. These will be finalized as a governance committee and presented to the full board for review after the school has been approved and in alignment with authorizer standards.

Category	Triggers	Potential Board actions
Academic & Mission	Below-target results for 2 cycles (years); subgroup gaps	Require improvement plan; adjust priorities/schedule/interventions; approve external coaching; increase academic reviews
Finance & Compliance	Budget imbalance; cash decline; audit/reporting issues	Require recovery plan; increase reporting cadence; commission external review; set spending controls
Operations, Facilities & Safety	Vendor failures; safety incidents; facilities/compliance gaps	Require corrective action plan + KPIs; remediate/replace vendors; tighten safety monitoring; request third-party assessment
People & Culture	High turnover; low staff engagement; vacancies/HR issues	Require talent stabilization plan; accelerate key hires; strengthen performance management; add coaching/support
Governance & Leadership	Missed obligations; persistent multi-area underperformance	Formal leadership evaluation; clarify roles; restructure leadership; leadership transition if necessary (per bylaws)

Escalation and Timeline

If an indicator falls below target for two consecutive reporting cycles, the Board initiates a formal intervention review and selects the appropriate intervention category/categories, unless there is a safety issue and/or egregious action where the board will act sooner. The Board sets:

- **A written plan** with owners, milestones, and measurable outcomes
- **A monitoring cadence** (e.g., monthly or more frequent until resolved)
- **A decision point** (e.g., 60–90 days) to assess progress and escalate if targets are not met

These interventions ensure the Board's response is data-driven, structured, and aligned to sustaining mission fidelity.

BUDGET AND FINANCE

Operating Budget

Question 56: Include, as **Attachment 9**, the completed budget using the state's required template. At a minimum, the budget must include:

- A month-by-month accounting of anticipated revenues and expenditures in Year 0 and revenues and expenditures for two scenarios (minimum and planned/anticipated) for years 1-5 of the school's operation.
- Anticipated budgetary assumptions for the following:
  - Student enrollment counts for years 1-5 of the school's operation;
  - Staff FTE counts for years 0-5 of the school's operation;
  - All anticipated funding sources, including state and local funding, secured grants, philanthropy, and fundraising; and
  - All relevant expenditures, expenses, and assumptions for each of the following expenditure/expense classification categories: salaries and benefits, contracted services, school operations, and facilities operations and maintenance.

See **Attachment 9** for the completed excel budget.

Question 57: Provide a budget narrative that includes a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should:

- Address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising);
- Describe anticipated funding sources. Indicate the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which have been committed and which are anticipated;
- Describe the minimum student enrollment needed to open and operate in Year 1;
- Discuss the school's planned approach to teacher salaries over time, including whether the school plans to use a step-and-ladder pay schedule or offer annual raises;
- Describe the year 1 cash flow contingency, in the event that revenue projections are not met in advance of opening; and
- Explain the school's contingency plan to meet financial needs for any year the school projects to be operating at a budget deficit.

The Gate School has developed a financially sustainable multi-year budget aligned to its unique academic model, anticipated enrollment, and operational plan. The assumptions are based on reasonable projections regarding revenue, enrollment, personnel, and operating costs. The budget covers pre-operational (Year 0) activities through the first five years of operation and allows TGS to fully implement the model outlined in the charter application.

Revenue Projections and Funding Sources

As is typical for new charter schools, this application budget reflects a higher reliance on variable funding, including startup grants, philanthropic contributions, and fundraising during the early years of operation. This front-loaded support is common in a school's startup phase,

when enrollment is ramping up and substantial one-time costs are incurred. As the school's enrollment grows and fixed costs are absorbed across a larger student base, financial sustainability is driven primarily by recurring state, local, and federal per-pupil revenues. This planned shift reduces long-term reliance on non-recurring funds and reflects a mature and stable operating model. The chart below illustrates this shift. Public recurring funds account for 99% of annual revenue by Year 2.

Revenue Type as % of Overall Annual Revenue						
Revenue Type	**Year 0**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Recurring State Revenue	0%	62%	93%	94%	94%	94%
Recurring Federal Revenue	0%	9%	5%	5%	5%	5%
Non-recurring Public Revenue	26%	15%	0%	0%	0%	0%
Non-public Revenue	74%	14%	1%	1%	1%	1%

Planning Year Revenue

During TGS's planning year, the school anticipates the following funding:

Planning Year Revenue		
Revenue	**Amount**	**Status**
Charter Schools Program (CSP)	$325,000	Submitted
New Schools Venture Fund start-up grant	$250,000	In Progress
Charter School Growth Fund	$250,000	In Progress
Other Grants	$410,000	61% Secured
Private/Individual Donations	$200,000	77% Secured
SCORE Facilities	$250,000	In Progress

TGS will continue to actively seek out and apply for additional public and private grants while the charter application is pending and during the planning year to put the school in a better position to serve students in Year 1.

Years 1-5 Revenue

TGS's first year revenue consists primarily of public state funds driven by projected enrollment of 120 students with a year-end ADM of 108. Per-pupil TISA revenue assumptions are based on Tennessee state and local funding estimates of $15,864 per pupil, inclusive of state and local TISA funding. Federal (direct and pass-through) revenues include anticipated CSP, Title I, and IDEA, estimated using conservative participation and allocation assumptions. Notably, the budget does not include Title II or E-Rate funds, both of which have traditionally been disbursed to Nashville charter schools. The chart below summarizes the school's Year 1 public funding excluding nutrition, which has tentatively included offsetting expenses. The budget provides sufficient cushion to absorb higher food expenses.

Year 1 Public Funding excluding nutrition			
Public Revenue Source	**Rate**	**Driver**	**Total Year 1 Revenue**

TISA (state and local)	$15,864	Per ADM	$1,713,312
Title I	$1,005	Modified DC Count	$71,202
IDEA	$1,857	Per SPED student	$28,078
CSP	$425,000	Annual total	$425,000

Enrollment is projected to grow each year by 120 students/108 ADM until the school reaches maximum enrollment of 360 students/324 ADM in Year 3. The decreased ADM vs. enrollment accounts for enrollment variance and student attrition. The budget does not include an annual increase to the per-pupil TISA rate. Likewise, federal funds do not include an annual increase to the estimated per-pupil rates.

While school-specific student demographics will drive annual TISA per-pupil rates, the budget uses the December 2025 MNPS district per-pupil average across all years. TGS anticipates enrolling students from across Nashville with student demographics roughly breaking down as follows:

- 41% designated with direct certification (66% modified direct cert after 1.6x multiplier applied)
- 14% with an active IEP
- 31% designated as ELL

Federal Funding Per-Pupil Rate Breakdown					
	Year 1	Year 2	Year 3	Year 4	Year 5
Enrollment	**108**	**216**	**324**	**324**	**324**
ED	44.28	88.56	132.84	132.84	132.84
ELL	33.48	66.96	100.44	100.44	100.44
SWD	15.12	30.24	45.36	45.36	45.36
Title I 1.6x	70.848	141.696	212.544	212.544	212.544
Modified ED	65.60%	65.60%	65.60%	65.60%	65.60%
Grant Totals					
Title I	$71,202.24	$142,404.48	$213,606.72	$213,606.72	$213,606.72
IDEA	$28,077.84	$56,155.68	$84,233.52	$84,233.52	$84,233.52
School Bfast	$58,320.00	$116,640.00	$174,960.00	$174,960.00	$174,960.00
School Lunch	$97,200.00	$194,400.00	$291,600.00	$291,600.00	$291,600.00
Total	**$254,800.08**	**$509,600.16**	**$764,400.24**	**$764,400.24**	**$764,400.24**
Per pupil	***$2,359.26***	***$2,359.26***	***$2,359.26***	***$2,359.26***	***$2,359.26***

The chart below summarizes anticipated supplemental funding across the first five years of school operations.

Other Funding			
Other Revenue Source	**Year**	**Status**	**Amount**
Nashville Funding Collaborative Grants	Years 1-5	Anticipated	$400,000
National Grants	Years 1-2	Anticipated	$435,000
Other Donations	Years 1-5	Anticipated	$85,000 per year

Anticipated Staffing and Compensation

Staffing levels are directly aligned to projected enrollment and the instructional model. See the chart below for projected staff counts by category through the first five years of operation.

Staff Count						
Category	**YR 0**	**YR 1**	**YR 2**	**YR 3**	**YR 4**	**YR 5**
Executive Instructional Partner	0.5	1	1	1	1	1
Operational Partner	0.5	0.5	0.5	1	1	1
Culture Partner	0.5	1	1	1	1	1
Instructional Partner	0	0	0	1	1	1
Student Supports Partner	0	0	0	1	1	1
Operations Director	0	1	1	1	1	1
Front Office Coordinator	0	1	1	1	1	1
Nurse	0	0	0	1	1	1
Instructional Associates (Core Content)	0	3	7	12	12	12
Other Instructional Associates (Enrichment)	0	2	4	5	5	5
SPED Associates	0	1**	2**	2^	2	2
English Language Associates	0	1	1	2	2	2
Other Instructional Support Staff (CTA & Parapro)	0	2	2	4	4	4
TOTAL STAFF:	**1.5**	**13.5**	**19.5**	**31**	**31**	**31**

**Includes at least one dual-certified SPED/EL teacher
^Note that this staffing is at 2 associates; however the Student Support Partner will also have a caseload of students as enrollment grows. See Question 24 for additional context.

TGS plans to implement a strategic staffing model intended to maximize academic outcomes, as explained in previous application sections.

Note: Positions are shown within role tiers in the budget and reflected in the organizational chart for planning purposes. The chart below outlines the specific content roles included in the staffing plan. Final placement within role tiers (Senior / Mid / Junior) will be determined by role scope and responsibilities, as well as demonstrated instructional and leadership effectiveness, rather than years of experience or credentials alone.

Instructional Associate Staffing Plan			
Subject	**Year 1**	**Year 2**	**Year 3**
ELA	1	2	3
Math	–*	1*	3
Social Studies	1	2	3
Science	1	2	3
Seminar	0.5	1	1
Spanish	–	–	1
Physical Education	0.5	1	1
Art	1	1	1
Computer Science	–	1	1

*Taught by partners in year 1 and 2

Compensation levels go beyond traditional MNPS benchmarks and reflect TGS's commitment to attracting and retaining high-quality staff while maintaining financial sustainability. Staff salaries remain flat across years in the budget due to limitations of the application template; however, TGS's actual compensation strategy is grounded in its Teaching Firm model, and is determined by role-based tiers (i.e. Partners, Senior/Mid/Junior Associates). Each tier reflects a distinct scope of instructional responsibility, leadership contribution, and influence on outcomes.

As the school scales, TGS intends to formalize a step-and-ladder framework aligned to role expectations, allowing staff to earn compensation increases through demonstrated instructional effectiveness, expanded responsibilities (such as mentoring, curriculum leadership, or cross-team contributions), and sustained impact on student learning and team outcomes. Progression is earned through performance and role readiness, not time served. In addition, TGS plans to incorporate cost-of-living adjustments when fiscally feasible. These adjustments are not guaranteed annually and are not reflected in the static budget tables within the application template, but they are a component of TGS's long-term talent strategy. This approach is designed to support retention, reduce burnout, and create a sustainable teaching career pathway that keeps excellent educators in classrooms while recognizing increased responsibility and impact.

Average Staff Salaries	
Category	**Average Base Salary** (full-time equivalent)
Executive Instructional Partner	$120,000
Operational Partner	$120,000
Culture Partner	$120,000
Instructional Partner	$120,000
Operations Director	$85,000
Front Office Coordinator	$55,000
Nurse	$65,000
Junior Instructional Associates	$65,000
Mid-level Instructional Associates	$75,000
Senior Instructional Associates	$100,000
CTA	$50,000
Paraprofessional	$45,000

Special Education Staffing

The Gate School will employ a dedicated, full-time special education teacher for every grade level the school serves. These are stand-alone instructional positions — they are not shared with general education, not split across enrichment roles, and not embedded inside any other function. SPED FTE scales as the school adds grades, maintaining a consistent caseload across all years of operation:

Year	Grades Served	Projected Enrollment	Projected IEPs (~14%)	Dedicated SPED Teachers (FTE)	Caseload per Teacher

Y1	6	120	~17	1.0	~17
Y2	6–7	240	~34	2.0	~17
Y3	6–8	360	~50	2.0^	~17
^Note that this staffing is at 2 associates; however the Student Support Partner will also have a caseload of students as enrollment grows.					

A consistent ~17:1 caseload sits well within Tennessee State Board Rule 0520-01-09 caseload limits and gives every IEP student meaningful contact time with a credentialed SPED teacher.

TGS classifies all teachers — general education, Special Education, and English language — as Junior, Mid-Level, or Senior **Instructional Associates** based on role scope and demonstrated effectiveness rather than subject area. SPED teachers are therefore budgeted within the **Instructional Associates** lines on **Tab [Staff Counts], Rows 26-28** of the budget template, at the same per-FTE compensation as any other teacher of equivalent tier.

Employer Taxes and Benefits

The proposed budget includes employer taxes and benefits accounting for 30 percent of base staff compensation, which reflects a reasonable and conservative estimate for a Tennessee charter school. This assumption accounts for required employer payroll taxes, retirement contributions, including TCRS, Empower, and Metro pension, and health and welfare benefits, and aligns with prevailing practices among comparable charter schools in the state. Budgeting at this level provides sufficient capacity to meet statutory obligations and offer competitive benefits while protecting the school from cost volatility during early operations.

Non-Personnel Expenses

Facilities and Furniture

During the planning phase, the school is budgeting to rent a facility with $43K set aside for 1-2 months of lease payments and up to $500K in tenant improvements.

The school's facility budget is built on conservative, widely accepted planning assumptions to support long-term financial sustainability. Facility size is projected at approximately 100 square feet per student, scaling proportionally as enrollment grows to full capacity. This assumption aligns with national benchmarks established by the Council of Educational Facility Planners International (CEFPI)[130], which identifies this range as typical for K–12 facilities and inclusive of classrooms, shared spaces, and support areas. This figure has also been recently applied as a planning benchmark by leading charter facility organizations, including LISC[131], which cites 60 to 120 square feet per student as the recommended gross square footage range for charter school facilities, and Bellwether Education Partners[132], whose analysis of national charter construction costs uses 100 square feet per student as the standard rule of thumb for newly constructed buildings.

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[130] Gross Square Feet Per Student: A CEPFI Brief on Educational Facility Issues
[131] LISC: Assessing Your Space Needs
[132] Bellwether Education Partners

To maintain a healthy and balanced operating budget, the school allocates no more than 15% of annual revenue toward facility costs, consistent with recommendations from Raymond James, Nashville Incubator, and national charter finance guidance[133]. This threshold reflects industry standards for sustainable charter operations, as exceeding this percentage is associated with elevated financial risk and reduced long-term viability. Many turnkey charter developers and lenders, including 22Beacon, one of the largest and oldest charter school developers, similarly require facility costs to remain at or below this level as a condition of project approval. Should projected facility costs exceed this benchmark in any year, the school will pursue alternative space configurations, renegotiate lease terms, or phase enrollment growth to ensure alignment with revenue. These assumptions are incorporated into multi-year financial projections and contingency planning to protect cash flow and prevent structural deficits.

The chart below shows the anticipated square footage based on enrollment, as well as budgeted monthly rent.

Anticipated Facility Costs						
Fiscal Year	Student Enrollment	Allocation of Sq Ft per Student	Anticipated Square Footage Needed	Annual Rent	Monthly Rent	Cost per square foot
FY27 (yr 0)	0	100	12,000	$42,832 *(2 months)*	$21,416	$21.42
FY28 (yr 1)	120	100	12,000	$256,997	$21,416	$21.42
FY29 (yr 2)	240	100	24,000	$513,994	$42,833	$21.42
FY30 (yr 3)	360	100	36,000	$770,990	$64,249	$21.42
FY31 (yr 4)	360	100	36,000	$770,990	$64,249	$21.42
FY32 (yr 5)	360	100	36,000	$770,990	$64,249	$21.42

Further, this cost per square foot and annual lease rate is in line with other schools in the Nashville area. See below for a breakdown of 5 other schools in the area and their lease rates for the next three years as well as cost per square foot.

Lease Rates and Cost Per Square Foot Breakdown for Schools in the Nashville Area							
	Sq Ft	2025-2026		2026-2027		2027-2028	
		Annual Cost	Cost per sq ft	Annual Cost	Cost per sq ft	Annual Cost	Cost per sq ft
School A	19,694	$ 354,492	$ 18.00	$ 354,492	$ 18.00	$ 354,492	$ 18.00
School B	14,287	$221,280	$ 15.49	$ 227,918	$ 15.95	$ 234,756	$ 16.43
School C	13,345	$ 240,210	$ 18.00	$ 268,166	$ 19.00	$ 367,611	$ 21.21
School D	21,399	$ 252,000	$ 11.78	$ 259,560	$ 12.13	$ 267,346	$ 12.49
School E	19,694	$ 433,268	$ 22.00	$ 433,268	$ 22.00	$ 433,268	$ 22.00

Utilities have been reasonably budgeted based on the historical averages in the area. Building repairs and maintenance costs are difficult to predict year to year. The school is budgeting

[133] Introduction to Charter School Finance. Opportunity Zones Charter School Programs. USDOE

$40,000 in year 1, $50,000 in year 2 and future years (with slight increases each year to account for cost inflation). This will be an area of focus for school leadership, and all reasonable steps will be taken to invest in appropriate maintenance agreements (e.g., HVAC, elevator, etc.) to minimize the cost of preventable repairs.

TGS is budgeting $100K per year from planning year through year 2 ($300K total) for school furniture.

Technology and Equipment

The budget includes reasonable student and staff technology budgets. In the planning year, $27,655 is set aside for staff laptops and equipment, $49,500 is set aside for student devices and related hardware, and $20,000 is set aside for network hardware. In Year 1, $19,040 is budgeted for new staff technology, and $50,490 is budgeted for student devices. The budgets begin to decrease in year 3 as need for new hardware begins to level off: $20,745 for staff and $40,000 for student devices. In Year 4, the school budgeted $30,000 as a maintenance budget for replacing old devices, etc. Years 5 and beyond include a flat $20,000 budget for tech equipment maintenance.

Curriculum and Professional Development

Curriculum and Instructional Supplies: The budget contemplates costs directly associated with instruction in multiple expense lines: Classroom/Teaching Supplies & Materials, Textbooks/Workbooks, and Student Testing & Assessment. These lines, taken together, provide $49K in Year 1, $90K in Year 2, $133K in Year 3, $136K in Year 4, and $138K in Year 5. Notably, TGS will utilize free resources for math and science curriculum, which frees up significant funding for other areas of instruction. Math and science courses will require some costs, which are contemplated in the totals above, and staff development, which is contemplated in the professional development section.

Special Education Services and Supplies: TGS anticipates approximately 14% of the student body to have an active IEP and has budgeted accordingly to ensure all students are appropriately supported. Special education services are budgeted at $1,085 per SPED student in Year 1. The per-SPED student rate decreases to $784 in Year 2 as economies of scale allow service providers to support more students at a decreased per-student cost. The per-pupil rate increases to $791 in Year 3, $807 in Year 4, and $823 in Year 5. Special education supplies will only be used for SPED students and have been budgeted at $299 per SPED student in Year 1, and roughly $250 in future years as economies of scale allow the school to spend more overall but less per pupil.

Professional Development: Excellent instruction requires both deep content expertise and the ability to implement proven pedagogical practices. This understanding is the cornerstone of the TGS model, which is why the school is budgeting a substantial amount for professional development, with $14,280 budgeted in Year 1, $23,930 in Year 2, with an ongoing base budget of $35,020 beginning in Year 3 with 2% annual inflation on top of the base budget in future years. Additionally, TGS is investing in AI tools to support teachers in instruction and development. This is included in the Educational Software line.

Field Trips: TGS has included a flexible budget for student field trips, setting aside approximately $76 per student in Year 1 with that rate continuing in future years plus 2% annual cost inflation.

Other Non-Personnel Expenses

Food Service: TGS plans to apply for SFA status and run its own food service program. Expenses are tentatively budgeted at $3/per student for breakfast and $5/per student for lunch for 180 school days. Offsetting food reimbursements are built into the per-pupil federal revenues. The budget provides sufficient cushion in the event that revenues fall short of expenses.

Student Transportation: TGS is budgeting annual transportation cost at $80K/bus with 2% annual cost inflation. For budgeting and operational planning purposes, TGS assumes that approximately 50–60% of students will utilize daily transportation. This assumption is informed by local MNPS transportation and enrollment benchmarks. A 2024 NewsChannel 5 report[134] stated that MNPS operated 525 buses transporting approximately 45,000 students daily during the 2024–2025 school year. MNPS [135]enrollment for the same school year was approximately 80,820 students, suggesting districtwide daily transportation usage of approximately **56%**. TGS uses this figure as a local planning benchmark, not a direct forecast, and will refine the assumption through family transportation surveys, student address mapping, and vendor route analysis prior to launch. In year 1, we secure bus capacity beyond the 50-60% estimated ridership.

Year	Projected Enrollment	*Estimated* Transportation Ridership	*Estimated* Daily Riders	Planned Buses
Year 1	120 students	50–60%	60–72 students	2 buses
Year 2	240 students	50–60%	120–144 students	3 buses
Year 3	360 students	50–60%	180–216 students	4 buses

Insurance: The TGS model does not require extensive supplemental insurance coverage to mitigate risk (e.g., high risk athletic programs) and the school plans to work with potential insurers to implement policies and other measures to minimize insurance costs. The budgeted insurance projection includes reasonable estimates for standard property and liability policies, with annual costs increasing as the student body grows.

Student Recruitment: TGS understands that healthy enrollment is necessary for a school to thrive and achieve its mission, which is why the school has budgeted $23,000 in the planning year and continues that base amount with 2% annual inflation in all future years.

Other Expenses: The budget aims to contemplate other regular expenses incurred by similar TN charter schools with reasonable estimates included among remaining expense lines. The remaining expenses allow the school flexibility to evaluate vendors and contracts as operational decisions are made.

Cash Position and Conservative Revenue Assumptions

Year	Ending Cash	Days Cash on Hand
Year 0	$ 654,943	232

[134] Metro Nashville ready to transport 45,000 students this school year
[135] MNPS Open Data Portal

Year 1	$ 685,006	90
Year 2	$ 1,000,771	90
Year 3	$ 1,219,796	76
Year 4	$ 1,389,660	86
Year 5	$ 1,520,083	94

The school maintains a strong and sustainable year-end cash position throughout the projection, ending each operating year with approximately 76 to 94 days cash on hand after an initial Year 0 reserve of approximately 232 days. This level of liquidity provides an appropriate operating cushion for a start-up charter school, supporting payroll, vendor payments, cash-flow timing, and the natural revenue variability that can occur during the early years of operation.

Importantly, the projection remains financially stable without assuming any annual increase to the state per-pupil TISA rate. Even under this conservative revenue assumption, ending cash grows from approximately $685,005 in Year 1 to approximately $1,520,082 in Year 5. This indicates that the school's expense structure is manageable, that the model is not dependent on optimistic state funding increases, and that operations can be sustained through disciplined budget monitoring and controlled expense growth

Minimum Enrollment Threshold

The revenue figures and corresponding expenses in the prior sections reflect the school's anticipated enrollment. In addition to the anticipated enrollment scenario, the budget workbook contemplates a contingency scenario with a minimum Year 1 enrollment of 90 ADM that allows TGS to successfully open and operate its core instructional model. The minimum threshold scenario also contemplates only adding 90 ADM each year with a maximum enrollment of 270 in Year 5. This threshold requires contingency actions to minimize fixed costs related to facilities, staffing, instructional materials, and administrative operations to maintain a sustainable financial foundation for future years but preserves the core academic program.

Even under the minimum enrollment threshold, The Gate School's academic model remains fully intact and operational. In Year 1, the school prioritizes daily instruction in all core academic subjects while strategically leveraging leadership teaching capacity and shared instructional roles to reduce staffing costs without reducing instructional access. ELA and Math are fully delivered through partner-taught sections, while Science and Social Studies are staffed by dedicated content teachers to ensure subject expertise and instructional coherence across cohorts. Seminar, a core component of the school's model focused on student independence and habits of learning, is delivered through a distributed staffing approach across leadership and core teachers, allowing the program to function without a standalone position. Art and Physical Education are offered through a shared role appropriate for launch-year enrollment, and required Special Education and English Learner services are fully staffed to ensure compliance and student support. As enrollment grows in subsequent years, the staffing model scales deliberately by adding subject-specific teachers, expanding elective offerings, and reducing reliance on partner teaching. This phased approach allows The Gate School to

preserve its core academic program at minimum enrollment while maintaining a sustainable financial foundation for long-term success.

Staffing accounts for the majority of operating expenses, so the above personnel adjustments provide most of the necessary cuts. Other expenses are appropriately scaled down to account for decreased enrollment as reflected in the minimum enrollment scenario. One of the biggest assets of our shared leadership/teaching model is our ability to adjust our hiring practices according to enrollment and still cover all operational, culture, and administrative needs.

Year 1 Cash Flow and Pre-Opening Contingency

TGS leadership understands the importance of cash flow management from charter approval through the first several years of operation and has developed contingency steps to mitigate the effects of potential revenue loss. The following steps are listed in general order of priority:

First, TGS will continue to plan for Year 0 and Year 1 using conservative enrollment and revenue assumptions and will develop multiple scenarios with varying levels of revenue shortfalls to better prepare for potential courses of action. Core staffing, facility agreements, and vendor contracts will be explicitly tied to these thresholds to avoid overextension ahead of opening. The school's priority in planning is to determine the best ways to reduce expenses while maintaining the core program.

Second, the school will prioritize liquidity by working to secure sufficient pre-opening cash reserves, startup funding, and, if necessary, short-term financing such as a line of credit to bridge the timing gap between expenditures and receipt of per-pupil revenue. Cash flow projections will be monitored closely and regularly to ensure adequate coverage of payroll and essential operating costs, and the school will avoid reliance on long-term or structurally unsustainable borrowing to support ongoing operations.

Third, TGS will phase hiring and discretionary expenditures, deferring non-essential staff, equipment purchases, and program expansions until enrollment and revenue are confirmed. Staffing decisions will emphasize flexibility, including consolidated roles and staggered start dates where necessary. The school will work with vendors to extend payment terms wherever possible and closely monitor cash outflows.

Fourth, leadership and the governing board will conduct frequent budget-to-actual and cash flow reviews during the pre-launch and early operational periods, enabling timely identification of emerging risks and prompt corrective action if revenues lag or expenses exceed projections.

Fifth, if financial performance falls below established thresholds, the governing board will implement graduated intervention measures, which may include enhanced reporting requirements, spending controls, revisions to staffing or operating plans, or engagement of external financial support.

Budget and Finance Capacity

Question 58: Describe the systems, policies, and processes the school will use for financial planning, accounting, purchasing, and payroll, including the method for conducting annual audits of the financial, administrative, and program operations of the school. Describe how the school will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements. Identify the role and key responsibilities of the individual who will be responsible for overseeing day-to-day financial management and system oversight.

TGS will utilize established financial systems and policies to support budgeting, accounting, purchasing, payroll, and financial reporting. The school plans to outsource a portion of its financial responsibilities to a qualified back-office provider with extensive Tennessee charter school experience. In addition, TGS leadership will include at least one qualified individual with experience managing school-based budgets and financial operations, including accounts payable processing, payroll coordination, and financial monitoring. This internal capacity, combined with outsourced expertise, will ensure appropriate separation of duties, timely oversight, and strong internal controls.

Soon after the charter application is approved, an RFP will be issued to find a qualified back-office provider. We are currently using CFO Business Strategies under the Nashville Incubator for temporary back-office support and using Vertex Education for budget and fractional CFO support. Potential providers will be evaluated based on experience supporting TN charter schools, technical competence in accounting and reporting, clear internal controls and risk management, governing board support, service scope, and overall cost. The budget contemplates the annual cost for this support: $14K for pre-launch support with the goal to begin service by January 2027, $60K in Year 1, $75K in Year 2, and $100K in Year 3 as the school reaches maturity.

Potential back-office providers will be thoroughly vetted to ensure that all proposed outsourced functions align with TGS governing board policies, MNPS requirements, and applicable legal and regulatory standards. Providers must demonstrate established processes, qualified staff, and relevant expertise in areas including general ledger maintenance, payroll and accounts payable processing, monthly bank reconciliations, data security, grant management, Tennessee retirement systems, and required compliance reporting.

Once selected, the back-office provider will support the school's accounting, accounts payable, payroll, budgeting, forecasting, and long-term financial planning functions. The Operations Partner will manage the day-to-day relationship with the provider, while the Executive Instructional Partner and the board's finance committee will provide oversight through regular review of financial reports and key performance indicators. In coordination with school leadership, the back-office provider will also support the timely completion and submission of all required district and state financial reports.

The Operations Partner will serve as the school's primary internal manager of financial operations and liaison to the back-office provider. While transactional accounting, payroll, and reporting functions may be outsourced, the Operations Partner and Executive Instructional Partner will retain responsibility for day-to-day financial oversight, approval of expenditures,

monitoring of budget-to-actual performance, and school-level review of cash flow and financial reports. This structure ensures that key financial management, internal controls, and accountability remain within the school, with the governing board providing fiduciary oversight through regular reporting and review.

The school has budgeted for an annual audit of school-level operations and plans to bid this service out to qualified CPA firms. Additionally, the contracted firm will file the school's annual 990. The school's back-office provider will work directly with the auditor to ensure all reports and related documents are completed accurately and submitted on time.

TGS also plans to use start-up funds to engage an experienced attorney to provide support, including reviewing the school's fiscal policies to ensure they are legally comprehensive, training board members on effective financial oversight, and providing resources and expertise to mitigate legal risk as questions arise. The budget contemplates the annual cost for this support: $10K for these services in the pre-launch year and $5K in future years for ongoing support.

Finance Policies

See **Attachment 1** for draft financial policies that address board governance, budgeting, accounting and reporting, banking, cash management, purchasing, capitalization thresholds, internal controls and separation of duties, payroll and benefits administration, grant management and restricted funds, debt and long-term obligations, audit and compliance requirements, records retention, ethics, and procedures for financial monitoring and board intervention. These draft policies will be reviewed by a qualified attorney prior to adoption.

Question 59: Describe the procedures governing the deposit of idle funds, purchasing procedures, and comprehensive travel regulations.

See **Attachment 1** for a full draft of financial policies as part of our MOU with Vertex Education (EdTec). These policies included deposit of funds, purchasing procedures, and comprehensive travel regulations. We have pulled portions of the policies to this section.

Deposit of Idle Funds
Banking
Checking Account
The Board shall authorize the establishment of a non-speculative commercial checking account with a federally insured banking institution for the purposes of school operations. The bank must also participate in the Tennessee Public Funds Collateral Pool. ● The established checking account shall be the primary account for school financial obligations, as well as the primary account for deposit and receipt of all funds. Authorized signatories to this account shall be the [Executive Partner, Board Treasurer, Board Chair]. ● Checks under $5,000 will require the signature of the [e.g., Executive Partner or Board Treasurer or Board Chair, with the Executive Partner as the primary signer]. ● Checks of $5,000 or more will require the signature of the [e.g., Executive Partner AND either the Board Treasurer or Board Chair]. ● Checks payable to the Executive Partner must be signed by the Board Treasurer. Checks payable to the Executive Partner of $5,000 or more will require the signature of the Board Chair and the Board Treasurer.

Deposit of Idle Funds

Banking

- Under no circumstances should the recipient of a check also be a signatory on his or her own check.
- No additional checking accounts shall be established without board approval. The only bank accounts other than TGS Miscellaneous and Cafeteria Accounts that are authorized to be opened and to include TGS's name are accounts in the name of a Parent Teacher Association (PTA) or a courtesy fund in the name of a departmental unit.
- Board approval is also required to close a checking account.

Savings Account

The Board may authorize the establishment of a non-speculative, savings account with a federally insured banking institution that also participates in the Tennessee Public Funds Collateral Pool.

- An account bearing interest will not be considered speculative.
- Checks will not be written out of the savings account, and any transfer of funds to or from the savings account to the general checking account will be done in consultation with the Board Treasurer and will take the most current cash forecast into account.
- No additional savings accounts shall be established without board approval.
- Board approval is also required to close a savings account.

Depository Insurance and Collateralization of Funds

As a public charter school operating as a local education agency in the State of Tennessee, TGS's public funds are subject to statutory requirements governing the safeguarding of governmental deposits.

- **FDIC Insurance**
  Funds deposited by TGS are eligible for coverage by the Federal Deposit Insurance Corporation (FDIC) up to the applicable insurance limits. However, because TGS routinely maintains balances in excess of FDIC limits, FDIC insurance alone is not sufficient to fully protect public funds.
- **Tennessee Public Funds Collateral Pool**
  To ensure full protection of public funds, TGS shall maintain its primary depository accounts only with financial institutions that participate in the Tennessee Public Funds Collateral Pool (the "Collateral Pool"), as authorized under Tennessee law.

Depository Requirements

Accordingly:

- TGS shall use only financial institutions that are eligible public depositories and active participants in the Tennessee Public Funds Collateral Pool for the deposit of operating and reserve funds.
- Management shall periodically verify TGS's depository institution's continued participation in the Collateral Pool.
- TGS shall not maintain material balances of public funds in institutions that do not provide collateralization protections consistent with Tennessee law.

OVERSIGHT AND RISK MANAGEMENT

Deposit of Idle Funds
Banking
The governing board retains responsibility for ensuring that TGS's banking relationships adequately safeguard public funds. Selection of depository institutions shall consider safety, statutory compliance, internal control considerations, and operational needs.
Petty Cash Fund
● The Executive Partner may authorize the establishment of a petty cash fund of up to $1,000 to be maintained by the Operational Partner on TGS site in a locked, secure location. ● Initial funding of the petty cash fund should be done as a check from TGS's primary checking account. ● The petty cash fund is maintained by the Operational Partner. All requests for petty cash must be made in advance and approved by the Executive Partner. ● The Operational Partner records the disbursement in a log and maintains a copy of the approval. ● Any unused funds along with all receipts for items purchased must be returned to the Operational Partner. ● Monthly, the log and transactions will be reconciled by the Operational Partner and will be submitted to the back-office provider for entry into the accounting system. ● Upon request by the Executive Partner and subject to supporting documentation, funds from the school's primary checking account may be used to replenish the petty cash fund up to $1,000.
Deposits of Receipts
TGS will deposit all public funds within three (3) business days following receipt. In line with the following guidelines: ● Front office staff will open all mail daily, immediately sort and log all checks or money orders and forward them to the Operational Partner. Any bank checks or money orders received in person will also be given to the Operational Partner for logging. In the absence of the Operational Partner, the Executive Partner will fulfill the responsibilities of ensuring mail is processed. ● Cash payments, whether for student activities, donations, or other purposes, will be strongly discouraged. TGS will invest in a reputable point-of-sale system (e.g., Square, Clover, etc.) to accept electronic payments and donations. All cash payments will be processed and tracked through the point-of-sale system with all individuals receiving receipts for purchases and donations. The Operational Partner, with the front office staff, will review the cash report each week and affirm that the total collected matches the supporting documentation. ● Checks and cash waiting to be deposited will be stored in a secure location such as a locked deposit box or cash register accessible only by authorized staff. ● The Operational Partner or Executive Partner will restrictively endorse ("For Deposit Only") non-public checks or money orders to the checking account and deposit them, along with any cash collections as soon as practicable, at least weekly. The Operational Partner will log all deposits with details of what was included and compile associated backup (check images, deposit receipt, etc.) to keep on file or forward to the back-office provider.
INVESTMENT POLICY

Deposit of Idle Funds
Banking
Investment Objectives
The primary objectives of TGS's investment activities are, in order of priority: (1) Safety: Preservation of capital and protection of investment principal; (2) Liquidity: Maintenance of sufficient liquidity to meet operational needs; (3) Yield: Attainment of a reasonable rate of return
Authorized Investments
TGS may invest funds in the following instruments, consistent with Tennessee law governing public funds: ● Certificates of deposit with financial institutions participating in the Tennessee Public Funds Collateral Pool ● United States Treasury bills, notes, and bonds ● Money market mutual funds invested exclusively in U.S. Treasury and agency securities ● Tennessee local government investment pools approved for public fund investment
Prohibited Investments
TGS shall not invest in: ● Individual corporate stocks or bonds ● Derivative securities ● Commodity futures ● Real estate investment trusts (REITs) ● Cryptocurrencies or digital assets ● Any investment not explicitly authorized in this policy
Investment Procedures
The Board Treasurer, in consultation with the Executive Partner and back-office provider, shall: ● Review cash flow projections quarterly to determine funds available for investment ● Ensure investments mature in alignment with anticipated cash needs ● Maintain a ladder approach to investments when feasible to provide regular liquidity ● Obtain competitive quotes when investing amounts over $50,000
Collateralization
All investments not backed by the full faith and credit of the United States government must be held with institutions participating in the Tennessee Public Funds Collateral Pool or be fully collateralized in accordance with Tennessee law.
Reporting
Investment holdings and performance shall be reported to the Board quarterly as part of financial reporting. The report shall include: ● Total investment balance by type ● Maturity dates ● Interest rates and yields ● Compliance with this investment policy
Annual Review
This investment policy shall be reviewed annually by the Finance Committee and approved by the Board. Any modifications must be approved by the full Board.

Purchasing Procedures
Authorization of Expenditures
● All purchases of goods and services shall be consistent with the most recent board-approved budget. These expenditures shall not require additional board approval, except for contracts for professional services that will exceed or are likely to exceed a total annual amount greater than $25,000, or if the term will go past one year. ● Otherwise, all expenditures must be approved by the Executive Partner or the Operational Partner, who will review each proposed expenditure to determine whether it aligns with the board-approved budget. ● Nothing in this section shall prevent the Executive Partner from making an assessment to rebalance individual line items within the approved budget, provided the adjustments do not otherwise jeopardize the financial health of TGS or disrupt TGS's educational program. Adjustments greater than $25,000 or that otherwise will decrease projected operating income by more than 2% should be discussed with the Board Treasurer.
Contracts and Bidding
● All professional services shall be provided for under a contract. Only the Executive Partner will sign any such contract. ● The Executive Partner can execute single year contracts for professional services that will not exceed or are not likely to exceed $25,000. For contracts for professional services that will exceed or are likely to exceed a total annual amount greater than $25,000, or the term will extend for a period greater than one year, board approval will be required prior to execution. Length of contracts shall be at the discretion of the Board in consultation with the Executive Partner, and multi-year contracts shall not be prohibited. ● Should a contract require board approval per the above, but timing or other circumstances require execution prior to being approved at a board meeting, the Executive Partner, with the approval of both the Board Chair and Board Treasurer, may conditionally execute said contract. The contract will need to then be formally approved at the next board meeting. ● Should an existing contract exceed the stated ceiling or length of the contract, board approval is required. ● Unless otherwise expressly required by local or state law, or by conditions of a funding source such as the National School Lunch Program or the Charter Schools Program or any other state or federally funded program, TGS shall not be required to conduct a formal bid process for contracted services and goods. However, the Executive Partner or the Operational Partner shall make good faith efforts to secure at least three (3) quotes and proposals to ensure a prudent, cost-effective use of funds. Multiple quotes are not required for a "sole source" contract. ● Nothing in this section shall require or be interpreted to require TGS to choose or select the lowest cost provider of goods or contracted services, and TGS will have discretion in what criteria it gives most weight when selecting vendors and providers in order to maximize student achievement and well-being. ● Consistent with this section, any rules or regulations governing federal funds shall supersede the above when otherwise contradictory.

Purchasing
Once sufficient diligence has been done by way of quotes, proposals, and/or research and an expenditure has been approved, the Operational Partner or an employee with approval will either request an invoice from a vendor or submit a formal purchase order to request an invoice.
Invoice Processing and Requests for Payment
● On a weekly basis, the Operational Partner will review invoices for accuracy, as well as review invoices for goods against received goods and packing slips and address any inconsistency with vendors. Each week, the Operational Partner will process all invoices received, including both expense and restricted fund account coding. All weekly invoices will be compiled and summarized in a payment approval report to be reviewed by the appropriate approvers based on the approval thresholds described below. ● Notwithstanding the above, TGS shall abide by the back-office provider accounts payable policies and procedures set forth separately regarding documentation requirements, systems, timelines, and submissions. These policies and procedures must, at a minimum, adhere to generally accepted internal control standards that would satisfy a qualified independent auditor.
Payment Approvals
● Payments under $5,000 must be approved by one of the following authorized positions: Executive Partner, Board Treasurer, or Board Chair, with the Executive Partner being the primary approver. ● Payments for $5,000 or more must be approved by the Executive Partner AND Board Treasurer or Board Chair. ● Payments to the Executive Partner should be approved by the Board Treasurer, and if in excess of $10,000, by the Board Chair as well. ● Under no circumstances should the recipient be the approver. For regular recurring, not re-occurring, payments, such as rent, when the amount is fixed and the frequency of payment is set, annual approval is allowed. ● Payment will be issued only after all required approvals have been documented. A check register will be generated for each invoice batch as a record of issuance. If the board prefers to review, the monthly check register will be included in the monthly board packet for board review.
Debit Card Usage
● Debit card use is not allowed unless explicitly approved by the board, and only if other means of payment do not exist. ● Physical debit cards should be destroyed when received to prevent potential misuse or fraud unless a compelling reason exists to keep one on the school premises. Any existing debit cards must be kept in a secure location accessible only by approved staff.
Credit Card Usage
Subject to board approval, TGS may establish a credit card account. ● The credit card account may include spending rewards, but all rewards must be retained for the exclusive use and benefit of TGS.

- The use of a credit card shall be allowed with a maximum authorized credit limit of $20,000 in total and no single cardholder should have a limit above $4,000.
- Credit cards shall only be issued to and used by the Executive Partner and Operational Partner. Any additional issuance needs to be approved by the board. Use by any other person is prohibited.
- An individual charge should not exceed $4,000, except with approval by the Board Treasurer or Board Chair. Total charges in a month shall not exceed the credit card limit.
- Authorized credit card holders are responsible for submitting itemized receipts or other printed documentation from the vendor for all transactions and providing sufficient reporting as to the necessity of the charge. Credit card statements may not be considered as sufficient supporting documentation. If the card holder cannot provide a receipt or alternative documentation, s/he will complete a lost receipt form.
- For any purchases that are charged without adequate supporting documentation and justification, the purchaser and/or card holder may be required to reimburse TGS the amount of such purchases.
- Every effort should be made to pay the current balance due in full and mitigate financing charges unless a compelling reason exists for a partial payment.

Comprehensive Travel Regulations

Travel-Related Employee Reimbursements

This section is not applicable to regular travel by employees to TGS site or temporary workspace. This section applies to travel for a school business purpose away from school grounds such as a conference, training, required meeting with a vendor, or a recruitment event/activity.

- All employees must receive documented approval by the Executive Partner for all school-related travel.
- All efforts should be made to make cost-effective, efficient travel arrangements as expeditiously as possible to mitigate cost escalation. This applies to airfare, accommodations, and registration fees.
- Travel arrangements should be made and paid for directly by TGS by check or by the Operational Partner or Executive Partner using a school-issued credit card.
- In the absence of a superseding policy concerning per diem benefits, whether via the employee handbook or a separately adopted policy, as a matter of practice, meals during school-related travel will be considered reimbursable.
- Meals should be modest but otherwise appropriate given the circumstances.
- Receipts or documentation must be retained. Lack of documentation may be grounds for non-reimbursement.
- Incidental purchases made during school-related travel and otherwise necessary, such as taxi service, are considered reimbursable. Receipts or documentation must be retained. Lack of documentation may be grounds for non-reimbursement.
- Employees shall submit a reimbursement request with supporting documentation to the Operational Partner no later than one month from each purchase. A bank or credit card statement may not be considered adequate documentation, and lack of adequate

documentation or timely submission may be grounds for non-reimbursement or delayed reimbursement.
- Under no circumstances shall the purchase of alcohol be reimbursed.
- Nothing in this section shall supersede any personnel policies separately adopted regarding eligible, reimbursable expenses.

Employee Mileage Reimbursements

- All employees are reimbursed at the current standard mileage rate per mile as determined by the Internal Revenue Service for use of their own vehicle for school-related travel excluding regular travel to and from the workplace. If mileage is expected to exceed 100 miles or more, it must be pre-approved by an Executive Partner or Operational Partner.
- All employees requesting such mileage reimbursement are required to document the destination of each trip, its purpose, miles driven, and any associated parking fees and tolls, within one month after the travel date, supported by receipts, if applicable.
- Per IRS guidance, mileage of an employee driving from his or her residence to TGS or vice versa is not considered reimbursable.
- Nothing in this section is to be considered to supersede any personnel policies regarding eligible, reimbursable expenses.

Personal Use of School Funds

- Use of school funds for personal use is prohibited. Violation of this policy may result in discipline up to and including dismissal or, in case of a board member, removal. The board may seek restitution of any funds lost pursuant to this section.

Question 60: Describe any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services.

The Gate School will contract for specialized services when an external provider can offer greater expertise, compliance support, efficiency, or cost-effectiveness than building the function fully in-house during the school's early years. School leadership retains responsibility for oversight, performance monitoring, and alignment with the school's mission and budget.

All contracted services are procured through a competitive process aligned with Tennessee public procurement requirements. For services exceeding $50,000, The Gate School conducts a formal request for proposals. For services below that threshold, the school solicits a minimum of three quotes. Selection criteria include demonstrated experience serving Tennessee charter schools, quality of internal processes and controls, staff qualifications, cost, and scope of services. The Operations Partner and Founding Executive Partner jointly evaluate proposals, with final approval by the governing board.

During the pre-opening period, The Gate School has engaged Vertex Education, formerly EdTec, for back-office support related to planning, budgeting, financial modeling, and operational readiness. Prior to opening, The Gate School will either continue with Vertex Education or conduct a competitive evaluation of back-office providers based on cost, service scope,

Tennessee charter school experience, internal controls, reporting quality, references, and alignment with the school's needs.

The Board will approve major contracts at board meetings and monitor contracted services through regular financial reports, contract review, vendor performance updates, and annual budget oversight. School leadership will remain responsible for ensuring that contracted services meet legal requirements, operate within budget, and support the safe and effective operation of the school.

Contracted Service	Anticipated Provider	Anticipated Cost	Criteria for Selection
Back-office financial services, including accounting, payroll coordination, accounts payable/receivable, financial reporting, and audit support	Vertex Education / EdTec or comparable provider	$60,000 annually	Experience with Tennessee charter schools, quality of internal processes and controls, staff qualifications, service scope, reporting quality, references, cost, and ability to support payroll, AP, accounting, compliance reporting, and audit preparation.
Independent audit and Form 990 preparation	To be selected	$20,000 annually	Approved auditor on the TN State Comptroller's website, experience with Nashville or Tennessee charter school audits, nonprofit audit and Form 990 experience, strong references, independence, cost, and timeline reliability.
Special populations consulting and compliance support	Diverse Learners Cooperative or comparable provider	$10,000 annually	Experience supporting Tennessee charter schools, expertise in SPED/EL compliance, quality of training and coaching, references, alignment with inclusive instructional model, and cost.
Food service	To be selected	Year 1: $155,520; Year 2: $311,040; Year 3: $466,560	Compliance with federal and state nutrition requirements, experience serving schools, cost per meal, service reliability, food quality, ability to meet dietary needs, and references.

Transportation services	To be selected	Year 1: $160,000; Year 2: $240,000; Year 3: $320,000	Safety record, driver qualifications, insurance, fleet capacity, routing support, experience with school transportation, cost, reliability, and compliance with applicable student transportation requirements.
Nursing / health services	To be selected	Year 1: $30,000; Year 2: $45,000; Year 3: $0 contracted; full-time nurse budgeted as staff salary at $65,000	Appropriate licensure, school nursing experience, ability to support medication administration and health plans, availability, documentation systems, emergency protocol support, references, and cost.
Legal services, including charter authorization, governance, contracts, employment matters, facilities/lease review, compliance, and general counsel support	To be selected	$20,000 annually	Experience advising Tennessee charter schools, public schools, or nonprofit organizations; expertise in nonprofit governance, contracts, employment law, public procurement, charter compliance, and facilities/lease review; responsiveness; references; cost; and ability to provide targeted guidance on high-priority legal matters within the school's budget.
IT services, including network setup, device management, cybersecurity, help desk support, student information/data systems support, software implementation, and technology troubleshooting	To be selected	Year 1: $29,292 Year 2: $46,625 Year 3: $63,691	Experience supporting schools or mission-driven organizations, ability to manage student and staff devices, cybersecurity practices, help desk responsiveness, knowledge of school data systems, network reliability, implementation support, scalability as enrollment grows, references, cost, and alignment with the school's instructional technology model.

Question 61: Based on the team identified in **Table 4**, describe the sponsor's team's individual and collective qualifications for implementing the financial plan successfully. Identify any gaps in the sponsor's team and describe plans to fill those gaps with future hires. The discussion of both current team capacity and future hires should include a discussion of capacity in areas such as the following:

- Financial management;
- Fundraising and development; and
- Accounting and internal controls.

Burrus Cox, Executive Partner, contributes significant experience in developing school budgets and financial models in partnership with experienced operators. His background aligning academic design decisions with financial constraints ensures that instructional priorities are financially viable and sustainable. Burrus plays a key role in scenario modeling, staffing projections, and long-term financial planning, strengthening the connection between educational vision and fiscal decision-making.

Jim Leckrone, Operations Partner, brings over a decade of charter school operational leadership, including hands-on responsibility for budget development, financial controls, facilities planning, vendor management, and compliance. He provides overall financial and operational leadership, oversees budget monitoring, supervises the Director of Operations, and coordinates with the third-party back-office provider to ensure strong internal controls and timely financial reporting.

The Gate School Board provides governance and fiduciary oversight, with collective experience in finance, nonprofit governance, and organizational leadership. The Board is responsible for budget approval, monitoring financial performance, and ensuring strong internal controls and long-term financial sustainability.

Team Member Capacity		
Financial Management	**Accounting & Internal Controls**	**Fundraising and Development**
STRENGTHS		
Financial management is led by the Operations Partner, as discussed above, who has experience in budget development, monitoring, and scenario planning based on his experience as a school leader.	Accounting functions and internal controls will be supported by an experienced back-office provider, combined with internal monitoring by the Operations Partner and Director of Operations.	In the early years, fundraising efforts will be supported by Board members with nonprofit leadership experience and senior leadership oversight. Both have already supported connections and grants planning.
GAPS & FILLS		
● The Gate School wants to ensure that we have the right people on our team that have experience and the trainability for future success. See the 'Key Hires' section below for how we will engage in adding people to our team to strengthen our financial positions. ● As the school matures, the sponsor plans to add a development-focused role or consultant to lead grant writing, philanthropic partnerships, and long-term revenue diversification. This future hire will work closely with the Executive Partner, Operations Partner, and Board to ensure fundraising strategies align with the school's financial plan and growth projections.		

Key Hires

Director of Operations: The Director of Operations (Year 1 hire) will serve as the school-based operational execution lead, translating financial systems and procedures into daily practice. This role is responsible for purchase order and invoice tracking, payroll coordination, procurement support, and day-to-day financial operations, ensuring fidelity to approved budgets and established controls. This role will be trained by the Operations Partner in Years 1-3.

Back Office Provider: The Gate School also plans to hire a third-party back-office provider who will support in specialized accounting and compliance expertise, delivering general ledger services, payroll processing, financial reporting, cash flow monitoring, audit preparation, and compliance support. This partnership mitigates risk and ensures adherence to charter-specific financial and reporting requirements.

Question 62: Explain how the proposed school's financial health will be monitored and measured, including performance in pre-operations, during early years, and as an established organization. If the board determines a need to intervene regarding financial performance, what form(s) would that take?

The governing board will monitor and measure the proposed school's financial health through a structured framework that evolves as the school progresses from pre-operations to early operations and, ultimately, to an established organization. This framework will combine forward-looking planning, routine financial reporting, and will be based in part on the MNPS financial performance framework. The MNPS performance framework will be integral to measuring the financial health of the school.

Pre-Operation Phase

The pre-operation phase spans the period from charter approval through the first day of school. During this phase, the governing board and school leadership will prioritize disciplined cash management, monitoring of actual expenditures against the approved budget, completion of financial readiness activities, and continued refinement of opening-year financial plans.

Revenues during the pre-launch period are largely variable and timing-dependent, so leadership will closely monitor cash flow and adjust spending as needed to maintain adequate liquidity. As opening approaches and expenditures accelerate, the school will ensure that spending remains aligned with the approved budget. Concurrently, all required financial systems, controls, and processes will be fully implemented prior to opening. The school will also continue to evaluate multiple enrollment scenarios and maintain contingency plans to allow for timely financial adjustments if actual enrollment differs from projections.

Below are four categories with metrics the school will use to monitor financial health during the pre-launch phase with the understanding that much remains subject to change:

- **Revenue monitoring:** the school will track confirmed pre-launch revenues against planned assumptions and ensure that 95% of budgeted pre-launch revenues have been formally awarded or are otherwise accessible. The board will also monitor progress toward securing unbudgeted revenue opportunities.
- **Cash on hand:** the school will plan to begin Year 1 of operations (cash on hand at the beginning of July 2027) with 45 days of Year 1 operating expenses on hand.

- **Spending vs. budget:** cumulative pre-launch expenditures will be maintained within ±5% of the board-approved pre-launch budget and will be measured monthly.
- **Enrollment monitoring and contingency planning:** The school will create contingency budgets tied to multiple enrollment shortfall scenarios. The number of required contingency iterations will be two but may increase as needed closer to school opening.

School Growth: Years 1-3

During the school's growth phase, school leadership and the governing board will focus on managing cash, monitoring the school's debt burden, and building a strong financial foundation. As enrollment, staffing, and programming scale, the school will closely manage the timing and reliability of revenues relative to expenditures, maintain sufficient liquidity to absorb variability, and build reserves to mitigate future financial risk. As part of this, the school will closely monitor any debt or long-term obligations to ensure repayment terms remain manageable, covenants are met, and debt service does not constrain core instructional spending. Ongoing oversight of leverage and repayment capacity allows the board to balance access to facilities and capital needs with long-term financial sustainability. This approach enables the governing board to exercise effective fiscal oversight, respond promptly to emerging financial challenges, and support the school's long-term financial sustainability as it transitions from early operations to an established organization.

Below are five categories with metrics the school will use to monitor financial health during the growth phase:

- **Enrollment:** The school will monitor actual enrollment and ADM against budgeted assumptions and regularly assess the resulting impact on cash flow.
- **Cash flow:** The school will aim to have a monthly average at least 45 days cash on hand throughout the growth years with the goal of ending each fiscal year with at least 60 days' cash to support summer cash flow.
- **Spending vs. budget:** total expenditures will be maintained within ± 5% of annual board-approved budgets and will be measured monthly.
- **Debt and long-term obligations:** Annual debt service will be maintained within reasonable affordability limits determined by financial performance and in compliance with all lender covenants and reporting requirements.
- **Fund balance development:** The school will build and maintain an unrestricted fund balance to support financial resilience and long-term sustainability. The governing board will set annual goals based on financial performance but at a minimum the school will aim to maintain a fund balance of at least 10% of annual operating expenses by the end of Year 1, 15% by the end of Year 2, and 20% by the end of Year 3.

Established School

As a fully established organization, the school's financial oversight will focus on long-term sustainability, resilience to external circumstances, and continued protection of public funds. With enrollment stabilized and core systems in place, oversight and monitoring will focus on consistent operating performance, strong liquidity and reserves, prudent management of long-term obligations, and ongoing compliance with financial policies and audit requirements. Financial monitoring at this stage is designed to ensure the school remains well positioned to

withstand enrollment fluctuations, funding changes, and unforeseen costs while continuing to support its academic mission.

Below are four categories with metrics the school will use to monitor financial health during the growth phase:

- **Sustained operating performance:** The school will monitor annual net incomes and budget appropriately to ensure long-term sustainability. The school will aim to end each year with a net surplus of between 2-5% of annual revenue.
- **Liquidity:** The school will work to maintain sufficient reserves to absorb variability and unexpected events, with a minimum goal of ending each fiscal year with at least 60 days cash on hand and a target of at least 75.
- **Fund balance:** The school will maintain a fund balance of at least 20% of annual operating expenses.
- **Debt:** The school will regularly assess its current debt burden against future sustainability and long-term obligations. Debt service limits will be evaluated based on financial performance and compliance with existing covenants.

Oversight Summary

In addition to the specific goals and thresholds described above, the school will use annual audits and authorizer oversight reviews as indicators of financial health. The school will always maintain an annual goal of a clean audit with no findings or material weaknesses and an authorizer scorecard indicating that the school exceeds expectations on all financial indicators.

Financial performance metrics will be reviewed by the governing board on a regular basis through scheduled financial reports (e.g., monthly, quarterly, annual) and periodic deeper reviews as the school progresses through each stage of operation. If financial performance metrics are not met, the governing board will review the underlying causes and determine the appropriate level of intervention based on the severity and persistence of the issue. Board action may include increased financial reporting and oversight, direction to revise budgets or spending plans, implementation of corrective controls, or engagement of external financial expertise. Interventions will be timely, proportional, and focused on restoring financial stability while safeguarding public funds.

ADDENDA

Addenda are required of all sponsors meeting any of the criteria included below. Sponsors must complete all addenda that are applicable to their status and application. The addenda that the sponsor completes should align to the sponsor's history and intent as indicated on their letter of intent.

Additionally, sponsors may find that some addenda questions closely linked to questions asked in prior sections of the application narrative. Sponsors must answer each of the questions in the addendum, even if they feel they have answered the question previously. Sponsors may refer to previous questions and build upon prior answers when responding to addendum questions.

Addenda	Criteria
Addendum A	Sponsors that currently have or have ever had any relationship to a charter school anywhere in the United States, including but not limited to opening, operating, or managing a charter school
Addendum B	Sponsors proposing to open a new school that will create a network or as part of an existing network/CMO
Addendum C	Sponsors seeking to contract with a third-party education service provider (ESP), including a management organization
Addendum D	Sponsors seeking approval of multiple schools during this application cycle
Addendum E	Sponsors seeking to convert a traditional public school to a charter school
Addendum F	Sponsors seeking to open an Opportunity Public Charter School
Addendum G	Higher education institutions seeking to open a charter school

Addendum A - Not Applicable

Sponsors that currently have or have ever had any relationship to a charter school anywhere in the United States, including but not limited to opening, operating, or managing a charter school

Not Applicable

Addendum B - Not Applicable

Sponsors proposing to open a new school that will create a network or as part of an existing network/CMO

Not Applicable

Addendum C - Not Applicable

Sponsors seeking to contract with a third-party education service provider (ESP), including a management organization

Not Applicable

Addendum D - Not Applicable

Sponsors seeking approval of multiple schools during this application cycle

Not Applicable

Addendum E - Not Applicable

Sponsors seeking to convert a traditional public school to a charter school

Not Applicable

Addendum F - Not Applicable

Sponsors seeking to open an Opportunity Public Charter School

Not Applicable

Addendum G - Not Applicable

Higher education institutions seeking to open a charter school

Not Applicable

ATTACHMENTS

Attachment 1: Evidence of Community Engagement

Contents of Attachment 1:

Attachments 1.1: The Gate School Interest and Support Survey

Attachments 1.2: Memorandum of Understanding (MOUs)

- Attachment 1.2 A: The Ensworth School
- Attachment 1.2 B: Rafiq R. Kalam Id-Din II, Esq.,
- Attachment 1.2 C: Shelby Goodfriend, Nashville Incubator Facilities Support
- Attachment 1.2 D: Vertex Education (Formerly EdTec)
- Attachment 1.2 E: Washington Latin Public Charter School

Attachments 1.3: Local Philanthropic Support

- Attachment 1.3 A: Summary of Contributions & Events
- Attachment 1.3 B: Contributions to Date

Attachments 1.4: Stakeholder Focus Groups

- Attachment 1.4 A: Student Focus Group Summary
- Attachment 1.4 B: Teacher Focus Group Summary

Attachments 1.5: Experiential Camps and Classes

- Attachment 1.5 A: AI Explorers Camp
- Attachment 1.5 B: Tutoring at Haynes Garden
- Attachment 1.5 C: Acting Workshop in partnership with Nashville Children's Theatre
- Attachment 1.5 D: Inquiry-Based Summer Camp

Attachments 1.6: Summary of Prospective Talent Interest

Attachments 1.7: Community Events

- Attachment 1.7 A: Bellevue Community Center
- Attachment 1.7 B: McCrory Flats
- Attachment 1.7 C: PROPEL School Choice Fair
- Attachment 1.7 D: The Gate School at Tailgate
- Attachment 1.7 E: Holidays in the VUE Sponsorship
- Attachment 1.7 F: McCrory Community Dinner
- Attachment 1.7 G: Bellevue Community Picnic
- Attachment 1.7 H: Summer Kickoff Event
- Attachment 1.7 I: Schrader Lane Youth and Family Task Force Event

Attachments 1.8: Letters of Support

- Attachment 1.8 A: Community Organizations
- Attachment 1.8 B: Schools and Universities
- Attachment 1.8 C: Students
- Attachment 1.8 D: Families
- Attachment 1.8 E: Co-Workers
- Attachment 1.8 F: Facility Partners

Attachments 1.1: The Gate School Interest and Support Survey
Evidence of Community Engagement

THE GATE SCHOOL

WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

The Gate School Interest and Support Form

The Gate School will open in Fall 2027 as Nashville's newest public charter middle school. While enrollment won't begin until then, we'd love to connect with families now. Completing this form ensures you'll receive updates, event invitations, and enrollment information as we get closer to opening. Learn more about our school at our website.

burrus@nashvilleincubator.org Switch account

Not shared

* Indicates required question

Name *

First and last name

Your answer

Email

Your answer

Phone number

Your answer

Are you a Davidson County Resident *

- [ ] Yes
- [ ] No

Zip Code *

Your answer

I am interested as a: *(Check all that apply)* *

- [ ] Parent/Guardian/Caregiver
- [ ] Student
- [ ] Potential Staff Member
- [ ] Community Member
- [ ] Potential Community Partner
- [ ] Education Partner
- [ ] Other:

Do you support The Gate School opening as free public charter school in Davidson County? *

- ◯ Yes
- ◯ No
- ◯ Other: _____

Parent Only: What are you looking for in a school for your child? What is most important to you?

Your answer

Parent Only: What grade level(s) is your child currently in?

- [ ] Pre-K or younger
- [ ] Kindergarten
- [ ] 1st
- [ ] 2nd
- [ ] 3rd
- [ ] 4th
- [ ] 5th
- [ ] 6th
- [ ] 7th
- [ ] 8th
- [ ] 9th
- [ ] 10th
- [ ] 11th
- [ ] 12th

Parent Only: What school(s) do your children currently attend?

Your answer

I would be interested in enrolling my child in The Gate School in 2027 if it were to open:

Choose

I'd like to receive updates about (check all that apply):

- [ ] Enrolling my student at The Gate School
- [ ] Free Tutoring
- [ ] Volunteer Opportunities
- [ ] TGS Newsletter
- [ ] AI/Technology Camps

How did you hear about The Gate School? *

- [ ] Social Media
- [ ] Word of Mouth
- [ ] Website
- [ ] Community Event
- [ ] Other: _____

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THE GATE SCHOOL

WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

جيتنموذج الاهتمام والدعم لمدرسة

ستفتتح مدرسة جيت في خريف عام 2027 كأحدث مدرسة عامة ميثاقية (تشارتر) للمرحلة المتوسطة في مدينة ناشفيل. ورغم أن التسجيل لن يبدأ حتى ذلك الوقت، يسعدنا التواصل مع العائلات من الآن. يضمن إكمال هذا النموذج استلامكم للتحديثات، ودعوات الفعاليات، ومعلومات التسجيل مع اقتراب موعد الافتتاح. يمكنكم معرفة المزيد عن مدرستنا من خلال موقعنا الإلكتروني.

burrus@nashvilleincubator.org Switch account

Not shared

* Indicates required question

الاسم *

الاسم الأول واسم العائلة

Your answer

البريد الإلكتروني

Your answer

رقم الهاتف

Your answer

هل أنت من سكان مقاطعة ديفيدسون؟ *

- [ ] Yes
- [ ] No

الرمز البريدي *

Your answer

أهتم بالمشاركة بصفتي: (اختر كل ما ينطبق) *

- [ ] ولي أمر / وصي / مقدم رعاية
- [ ] طالب/ـة
- [ ] موظف محتمل/ـة
- [ ] عضو في المجتمع
- [ ] شريك مجتمعي محتمل
- [ ] شريك تعليمي
- [ ] Other:

هل تدعم افتتاح مدرسة جيت كمدرسة عامة ميثاقية (تشارتر) مجانية في مقاطعة ديفيدسون؟ *

- ( ) نعم
- ( ) لا
- ( ) Other:

للأهالي فقط: ما الذي تبحثون عنه في مدرسة لطفلكم؟ وما الأمور الأكثر أهمية بالنسبة لكم؟

Your answer

للأهالي فقط: في أي صف دراسي يدرس طفلكم حاليًا؟

- [ ] Pre-K or younger
- [ ] Kindergarten
- [ ] 1st
- [ ] 2nd
- [ ] 3rd
- [ ] 4th
- [ ] 5th
- [ ] 6th
- [ ] 7th
- [ ] 8th
- [ ] 9th
- [ ] 10th
- [ ] 11th
- [ ] 12th

للأهالي فقط: ما المدرسة أو المدارس التي يلتحق بها أطفالكم حاليًا؟

Your answer

سأكون مهتمًا بتسجيل طفلي في مدرسة جيت في عام 2027 في حال افتتاحها:

Choose

أرغب في تلقي تحديثات حول: (اختر كل ما ينطبق)

- [ ] تسجيل طفلي في مدرسة جيت
- [ ] دروس تقوية مجانية
- [ ] فرص تطوع
- [ ] النشرة الإخبارية لمدرسة جيت (TGS)
- [ ] مخيمات الذكاء الاصطناعي والتكنولوجيا

كيف سمعتَ/سمعتِ عن مدرسة جيت؟ *

- [ ] وسائل التواصل الاجتماعي
- [ ] عن طريق الأصدقاء أو المعارف
- [ ] الموقع الإلكتروني
- [ ] فعالية مجتمعية
- [ ] Other:

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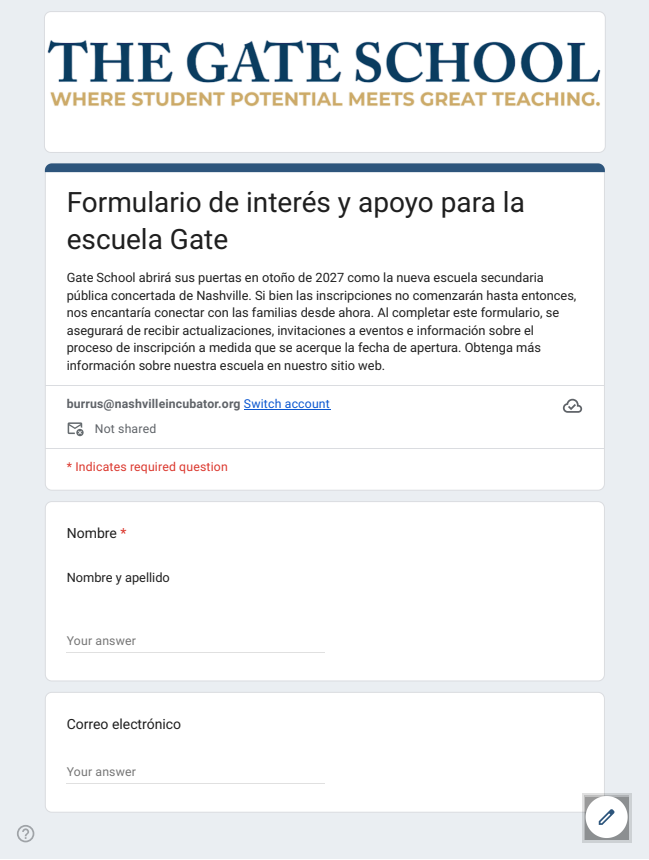


THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Formulario de interés y apoyo para la escuela Gate

Gate School abrirá sus puertas en otoño de 2027 como la nueva escuela secundaria pública concertada de Nashville. Si bien las inscripciones no comenzarán hasta entonces, nos encantaría conectar con las familias desde ahora. Al completar este formulario, se asegurará de recibir actualizaciones, invitaciones a eventos e información sobre el proceso de inscripción a medida que se acerque la fecha de apertura. Obtenga más información sobre nuestra escuela en nuestro sitio web.

burrus@nashvilleincubator.org Switch account
Not shared
* Indicates required question

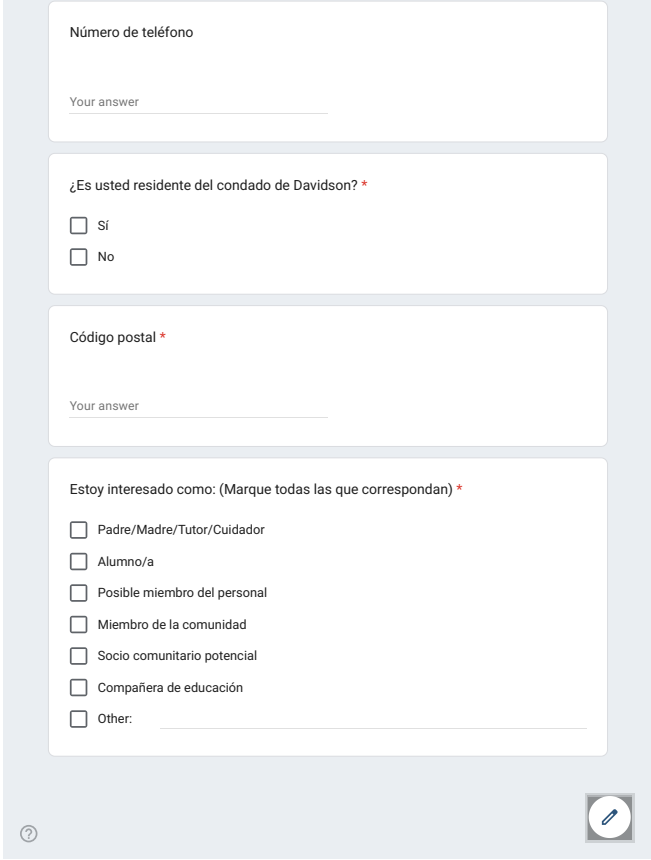
Nombre *

Nombre y apellido

Your answer

Correo electrónico

Your answer



Número de teléfono

Your answer

¿Es usted residente del condado de Davidson? *

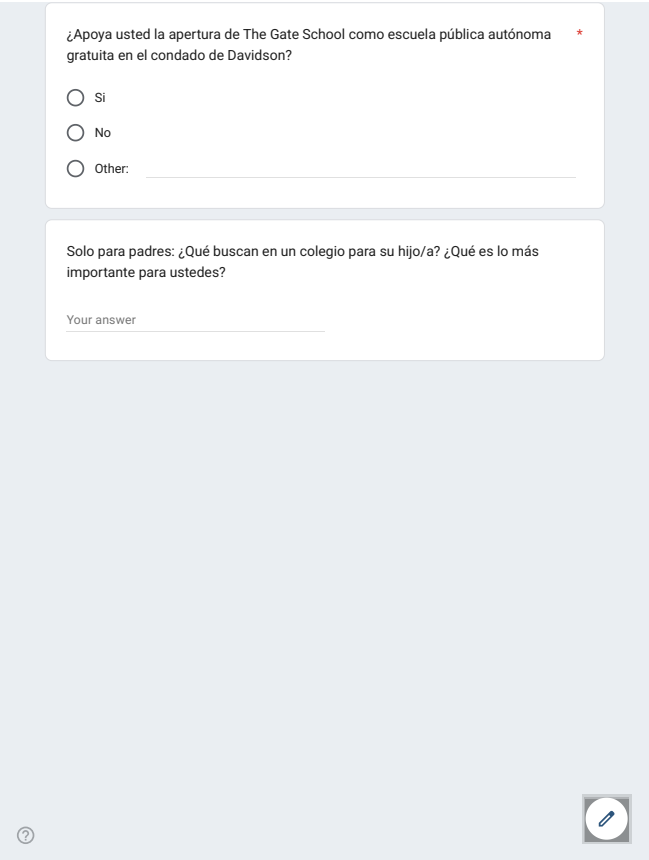
- [ ] Sí
- [ ] No

Código postal *

Your answer

Estoy interesado como: (Marque todas las que correspondan) *

- [ ] Padre/Madre/Tutor/Cuidador
- [ ] Alumno/a
- [ ] Posible miembro del personal
- [ ] Miembro de la comunidad
- [ ] Socio comunitario potencial
- [ ] Compañera de educación
- [ ] Other:

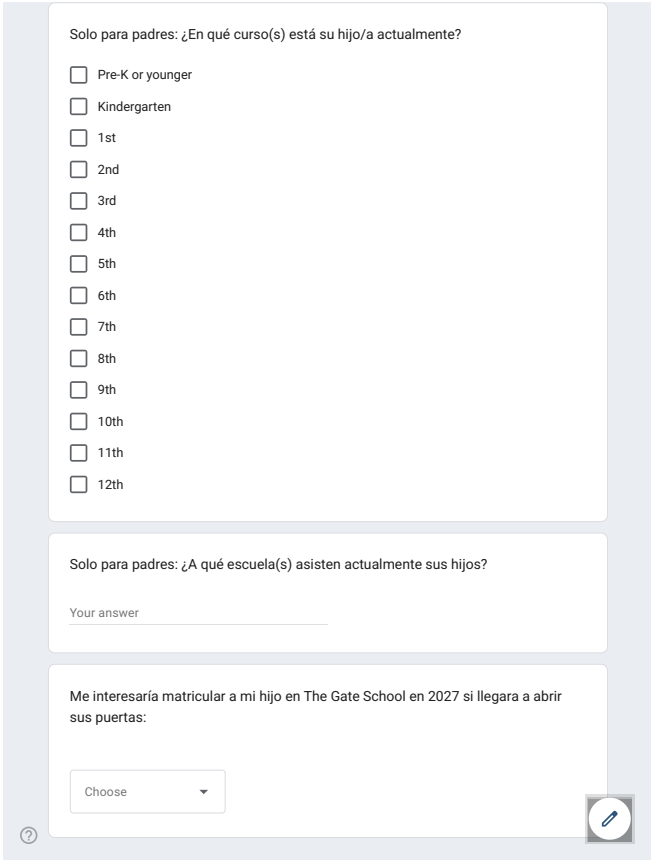


¿Apoya usted la apertura de The Gate School como escuela pública autónoma gratuita en el condado de Davidson? *

- ( ) Si
- ( ) No
- ( ) Other:

Solo para padres: ¿Qué buscan en un colegio para su hijo/a? ¿Qué es lo más importante para ustedes?

Your answer



Solo para padres: ¿En qué curso(s) está su hijo/a actualmente?

- [ ] Pre-K or younger
- [ ] Kindergarten
- [ ] 1st
- [ ] 2nd
- [ ] 3rd
- [ ] 4th
- [ ] 5th
- [ ] 6th
- [ ] 7th
- [ ] 8th
- [ ] 9th
- [ ] 10th
- [ ] 11th
- [ ] 12th

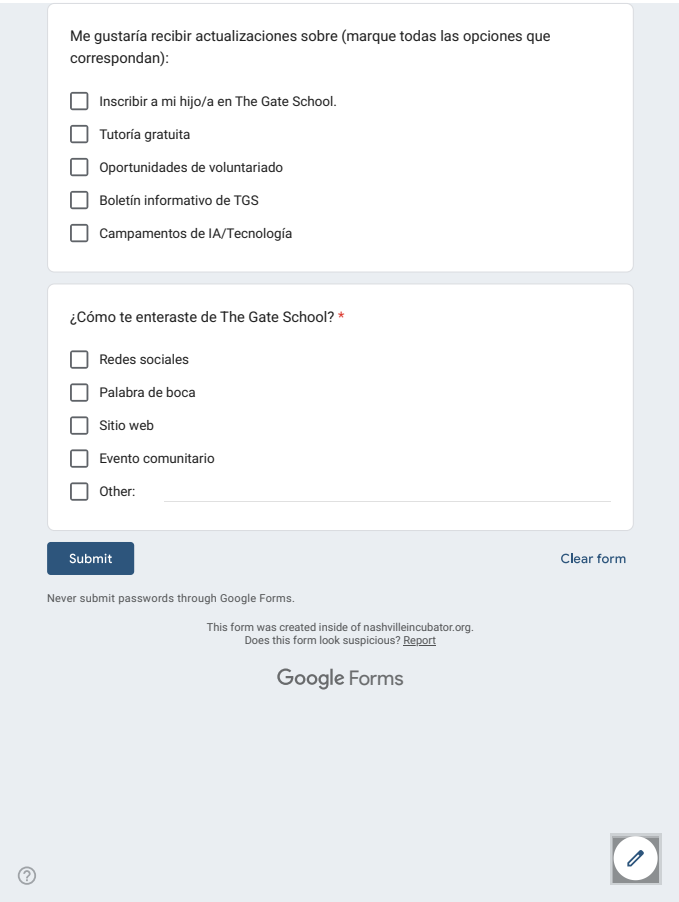
Solo para padres: ¿A qué escuela(s) asisten actualmente sus hijos?

Your answer

Me interesaría matricular a mi hijo en The Gate School en 2027 si llegara a abrir sus puertas:

Choose

ATTACHMENTS



Me gustaría recibir actualizaciones sobre (marque todas las opciones que correspondan):

- [ ] Inscribir a mi hijo/a en The Gate School.
- [ ] Tutoría gratuita
- [ ] Oportunidades de voluntariado
- [ ] Boletín informativo de TGS
- [ ] Campamentos de IA/Tecnología

¿Cómo te enteraste de The Gate School? *

- [ ] Redes sociales
- [ ] Palabra de boca
- [ ] Sitio web
- [ ] Evento comunitario
- [ ] Other:

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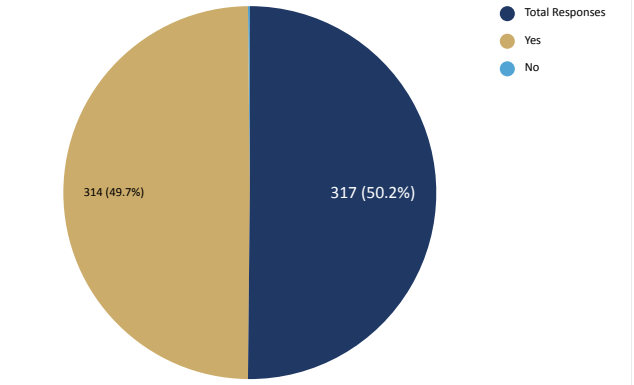
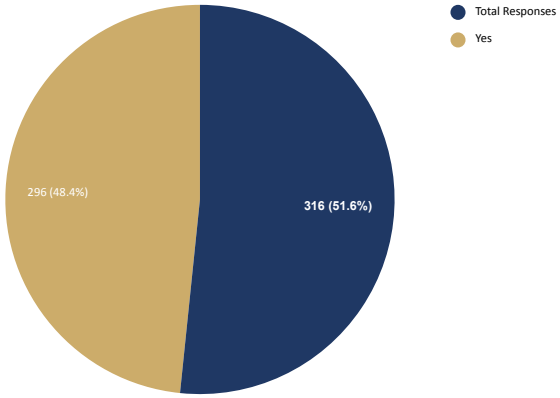
THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

The Gate School Community Survey: Visual Summary

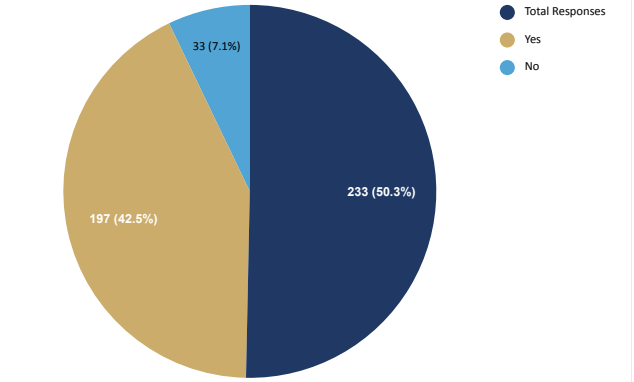
Do you support The Gate School opening as free public charter school in Davidson County?
317 Total Responses



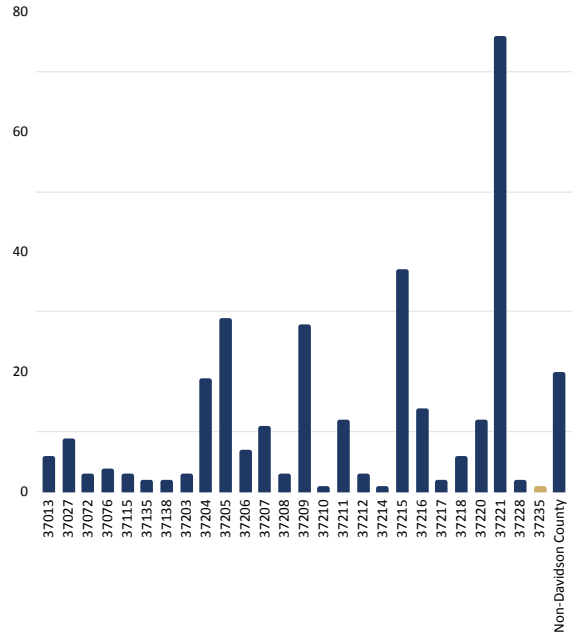
Are you a Davidson County Resident?
316 Total Responses



I would be interested in enrolling my child in The Gate School in 2027 if it were to open:
233 Total Reponses



Interest and Support by Zip Code
316 Total Responses



THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

The Gate School Community Survey Results

Are you a Davidson County Resident?		
Response	**Count**	**Percentage**
Total Responses	**316**	
Yes	296	93.67%
No	20	6.33%

Do you support The Gate School opening as a free public charter school in Davidson County?		
Response	**Count**	**Percentage**
Total Responses	**317**	
Yes	314	99.05%
No	1	0.32%
Maybe	2	0.63%

I would be interested in enrolling my child in The Gate School in 2027 if it were to open:		
Response	**Count**	**Percentage**
Total Responses	**233**	
Yes	197	84.55%
No	33	14.16%
Maybe	3	1.29%

What is your Zip Code?		
Response	**Count**	**Percentage**
Total Responses	**316**	
37013	6	1.90%
37027	9	2.85%
37072	3	0.95%
37076	4	1.27%
37115	3	0.95%
37135	2	0.63%
37138	2	0.63%
37203	3	0.95%
37204	19	6.01%
37205	29	9.18%
37206	7	2.22%
37207	11	3.48%
37208	3	0.95%
37209	28	8.86%
37210	1	0.32%
37211	12	3.80%
37212	3	0.95%
37214	1	0.32%
37215	37	11.71%
37216	14	4.43%
37217	2	0.63%
37218	6	1.90%
37220	12	3.80%
37221	76	24.05%
37228	2	0.63%
37235	1	0.32%
Non-Davidson County	20	6.33%

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check all that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
1/5/2025 0:00:00	Angela Morrison	[REDACTED]	[REDACTED]	Yes		Parent	Yes		2nd, 4th, 6th		Yes			
1/5/2025 0:00:00	Brooke Allen	[REDACTED]	[REDACTED]	Yes		Parent	Yes		4th		Yes			
1/5/2025 0:00:00	Candice Simon	[REDACTED]	[REDACTED]	Yes		Parent	Yes		4th, 5th		Yes			
1/5/2025 0:00:00	Ebony Taylor	[REDACTED]	[REDACTED]	Yes		Parent	Yes		4th		Yes			
1/5/2025 0:00:00	Janne' Alexander	[REDACTED]	[REDACTED]	Yes		Parent	Yes		4th		Yes			
1/5/2025 0:00:00	Kristin Cofoid	[REDACTED]	[REDACTED]	Yes		Parent	Yes		3rd, 3rd		Yes			
1/5/2025 0:00:00	Lisa Bhikha	[REDACTED]	[REDACTED]	Yes		Parent	Yes		1st, 3rd		Yes			
1/5/2025 0:00:00	Ms. Culp	[REDACTED]	[REDACTED]	Yes		Parent	Yes		4th		Yes			
1/5/2025 0:00:00	Nichelle Barksdale	[REDACTED]	[REDACTED]	Yes		Parent	Yes		3rd		Yes			
1/5/2025 0:00:00	Paul Reter	[REDACTED]	[REDACTED]	Yes		Parent	Yes		3rd		Yes			
1/5/2025 0:00:00	Tianna Ewing	[REDACTED]	[REDACTED]	Yes		Parent	Yes		4th		Yes			
1/5/2025 0:00:00	Trupa Patel	[REDACTED]	[REDACTED]	Yes		Parent	Yes		3rd		Yes			
1/15/2025 0:00:00	Beth Thompson	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		3rd		Yes			
1/15/2025 0:00:00	Beverly Weatherspoon	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		3rd, 5th		Yes			
1/15/2025 0:00:00	Brandy Mapes	[REDACTED]	[REDACTED]	Yes	37209	Parent	Yes		2nd & 3rd		Yes			
1/15/2025 0:00:00	Chad and Emily Hubert	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		4th, 5th		Yes			
1/15/2025 0:00:00	Daniel Morgan	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		4th, 2nd		Yes			
1/15/2025 0:00:00	Jason Coleman	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		4th, 3rd, K		Yes			
1/15/2025 0:00:00	Laura Jones	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		1st, 3rd		Yes			
1/15/2025 0:00:00	Melissa Vizor	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		4th, 3rd		Yes			
8/15/2025 20:04:45	Kimberly Johnson	[REDACTED]	[REDACTED]	No	37179	School Counselor	Yes	No						
10/3/2025 14:14:02	Hayden Reasonover	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver, Student	Yes	Yes						
10/4/2025 14:01:29	Sarah Addo	[REDACTED]	[REDACTED]	No	37146	Teacher/Educator	Yes	Yes						
10/7/2025 14:40:18	Kendall Cox	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Westminster		TGS Newsletter	Word of Mouth	
10/14/2025 12:50:02	Erica Stewart	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver, Potential Staff Member, Potential Community Partner	Yes				Yes		Word of Mouth	
10/21/2025 11:42:54	Scott Campbell	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Teacher/Educator	Yes		3rd and 5th		Yes			
10/23/2025 16:03:25	Lisa Stone	[REDACTED]	[REDACTED]	Yes	37027	Parent/Guardian/Caregiver	Yes		6th	Valor Collegiate Academies			Word of Mouth	
10/23/2025 17:19:59	Rashida' Edmondson	[REDACTED]	[REDACTED]	No	37128	Parent/Guardian/Caregiver	Yes		6th, 6th, 4th, Kindergarten	Blackman elementary and blackman middle	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Email	Academics
10/28/2025 17:58:59	Leonard Mulloy	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes					Volunteer Opportunities	Word of Mouth	
10/28/2025 18:00:42	Harlan Holmes	[REDACTED]	[REDACTED]	Yes	37221	Potential Community Partner	Yes				Yes	Volunteer Opportunities	Word of Mouth	
10/28/2025 18:03:23	Mike McCormick	[REDACTED]	[REDACTED]	No	37069	Community Member, Potential Community Partner	Yes		10th	Franklin high school	No	TGS Newsletter	Word of Mouth	Good teachers
10/28/2025 18:04:21	Russell Keller	[REDACTED]	[REDACTED]	Yes	37205	Education Partner	Yes				Yes		Word of Mouth	
10/28/2025 18:55:01	Anne Simmons	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Potential Staff Member, Special education teacher	Yes		Pre-K or younger	They do not attend yet		Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter	Social Media, Word of Mouth, Website	Teachers who care for and are passionate about teaching my child
10/28/2025 19:01:06	Christine Murray	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes					TGS Newsletter	Word of Mouth	
10/28/2025 19:45:54	Nan Cox	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Grandchildren	Grandchildren	Yes	Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter	Social Media, Word of Mouth	Excellent academics taught by the best educators who are passionate about education and passionate about teaching, and loving, and caring for the next generation… every child has value and is worthy of our care and
10/28/2025 20:30:37	Tom Cox	[REDACTED]	[REDACTED]	Yes	37205	Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Word of Mouth	
10/28/2025 20:52:45	John Carney	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver, Community Member, Potential Community Partner, Education Partner	Yes					Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter	Word of Mouth	
10/29/2025 9:38:30	John Hazen	[REDACTED]	[REDACTED]	Yes	37204	Potential Community Partner	Yes					TGS Newsletter	Social Media, Word of Mouth, Website	
10/29/2025 9:38:35	Thomas Estes	[REDACTED]	[REDACTED]	Yes	37205	Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Social Media	
10/29/2025 9:39:15	Rob DeCamp	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Social Media, Word of Mouth, Website	
10/29/2025 9:40:19	Banks Smith	[REDACTED]	[REDACTED]	Yes	37027	Community Member	Yes		NA	NA	Yes	Volunteer Opportunities, TGS Newsletter	Burrus Cox	Teaching my children how to lean.
10/29/2025 9:40:51	Baxter Jackson	[REDACTED]	[REDACTED]	Yes	37205	Potential Community Partner,	Yes					Volunteer Opportunities, AI/Technology Camps	Social Media, Word of Mouth, Website	
10/29/2025 9:42:11	Creed McClellan	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger	The Academy (daycare)	Yes	Enrolling my student at The Gate School	Word of Mouth	Community, strong education, safety
10/29/2025 9:42:25	Tyler sinks	[REDACTED]	[REDACTED]	No	63119	Community Member, Friend	Yes		Pre-K or younger	None	Yes	TGS Newsletter	Word of Mouth, Website	Education, growth and friendship
10/29/2025 9:43:18	Richard Bowers	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes			Homeschool	Yes	Enrolling my student at The Gate School	Word of Mouth	Value alignment, trustworthy teachers, safety, caring/engaged teachers/staff
10/29/2025 9:43:43	John Webb	[REDACTED]	[REDACTED]	Yes	37209	Community Member	Yes						Word of Mouth	A community that allows students to thrive with a focus on quality education
10/29/2025 9:45:43	Wyatt McClellan	[REDACTED]	[REDACTED]	Yes	37209	Community Member	Yes				Yes	Enrolling my student at The Gate School, Free Tutoring, AI/Technology Camps	Word of Mouth	
10/29/2025 9:45:51	Luke Massei	[REDACTED]	[REDACTED]	Yes	37211	Community Member	Yes						Word of Mouth	
10/29/2025 9:49:22	Andrew Bowers	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver	Yes		Kindergarten		Yes		Word of Mouth	Teachers I can trust
10/29/2025 9:50:12	Alex Benson	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes				Yes	Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	
10/29/2025 9:52:00	Luke Hazen	[REDACTED]	[REDACTED]	Yes	37204	Community Member	Yes						Word of Mouth	
10/29/2025 9:53:39	Jake Estes	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Pre-K or younger	Pre school - woodmont Christian		TGS Newsletter	Word of Mouth	Consist teaching style, safety, comfortable environment, curriculum guidelines

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check all that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
10/29/2025 9:57:48	Clint Smith	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Pre-K or younger	Immanuel Baptist Preschool	Yes	TGS Newsletter	Social Media, Word of Mouth	Academic quality and learning curriculum. Safety too
10/29/2025 10:04:46	Grant Caudill	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Pre-K or younger	Westminster	Yes	Volunteer Opportunities	Burrus Cox	Quality teachers
10/29/2025 10:10:04	Shawn stankavage	[REDACTED]	[REDACTED]	Yes	37212	Community Member	Yes		N/A	N/A	Yes	Enrolling my student at The Gate School	Burrus Cox	Influence
10/29/2025 10:10:46	Paul Caudill	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver, Potential Community Partner	Yes		Pre-K or younger	Westminster School for Young Children	Yes	Enrolling my student at The Gate School	Social Media, Word of Mouth	High Education Standards and friendly community
10/29/2025 10:12:29	Holt Madden	[REDACTED]	[REDACTED]	Yes	37203	Parent/Guardian/Caregiver	Yes		1	Grow academy			Friends	A vibrant and safe school environment that provides another option within the community
10/29/2025 10:13:16	David Dingess	[REDACTED]	[REDACTED]	Yes	37205	Community Member	Yes		12th	Ensworth	Yes		Word of Mouth	Teacher/student relationship
10/29/2025 10:15:07	Fran Chatfield	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver, Part time coach	Yes		Pre-K or younger	Woodmont Christian daycare	Yes		Word of Mouth	Genuine care for development and learning over test scores. Real world teaching.
10/29/2025 10:21:29	Derek Pickard	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Primrose	No	Free Tutoring	Word of Mouth	Personalized teaching
10/29/2025 10:25:57	Francis Stanley	[REDACTED]	[REDACTED]	Yes	37205	Potential Community Partner	Yes		Pre-K or younger, Kindergarten	St. Paul and Woodmont Baptist	Yes	TGS Newsletter	Word of Mouth	Classrooms where the teachers provide nurturing and attention to the kids, school is a safe place, and there is a strong community and connection with the parents.
10/29/2025 10:32:01	Jacob Carter	[REDACTED]	[REDACTED]	Yes	37209	Community Member	Yes				Yes	Volunteer Opportunities, TGS Newsletter	Social Media, Word of Mouth	
10/29/2025 10:48:24	Sam Cumbee	[REDACTED]	[REDACTED]	No	37027	Parent/Guardian/Caregiver	Yes					Free Tutoring, AI/Technology Camps	Burrus Cox	
10/29/2025 11:07:31	Carson Pate	[REDACTED]	[REDACTED]	No	75225	Community Member	Yes						Word of Mouth	
10/29/2025 12:39:37	Grace Jones	[REDACTED]	[REDACTED]	Yes	37207	Parent/Guardian/Caregiver	Yes		Pre-K or younger, Kindergarten	Glendale Elementary	No	Enrolling my student at The Gate School, AI/Technology Camps	Word of Mouth	Education
10/29/2025 12:47:53	William Clinkscales	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member	Yes		Kindergarten	Westminster	Yes		Word of Mouth	Quality of education
10/29/2025 13:02:39	Katie Smith	[REDACTED]	[REDACTED]	No	37027	Parent/Guardian/Caregiver, Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Word of Mouth	
10/29/2025 13:06:15	Becca Smith	[REDACTED]	[REDACTED]	Yes	37027	Parent/Guardian/Caregiver	Yes		Pre-K or younger	St. George's Kindergarten	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter	Word of Mouth	Community support
10/29/2025 13:09:59	Dorsey Meier	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver	Yes		Kindergarten	CPA			Word of Mouth	Education, community, leadership
10/29/2025 13:52:50	Katie Caudill	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger	Westminster	Yes	Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter	Word of Mouth,	Community, faith, strong academics
10/29/2025 14:50:02	Emily Macey	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver, Community Member, Education Partner	Yes		Pre-K or younger	St. George's preschool	Yes	Enrolling my student at The Gate School	Word of Mouth	Staff
10/29/2025 15:07:57	May Clinkscales	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger	Westminster School for Young Children	Yes	Volunteer Opportunities, TGS Newsletter	Word of Mouth, Our Cox fam!	Character building through academics, athletics, the arts
10/29/2025 15:25:34	Kate Downey	[REDACTED]	[REDACTED]	Yes	37215	Potential Staff Member	Yes						Word of Mouth	
10/29/2025 17:14:22	Alexander ellis	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Student, Potential Staff Member, Community Member, Potential Community Partner, Education Partner, Coach	Yes		4th	Julia green	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	A community of caring adults, mentors, and peers who uphold the same standards, expectations, discipline, and ethics that we value at home. Together, we create a consistent environment where children can continue to learn, grow, and develop strong character, even when they are away from family.
10/29/2025 20:09:24	Caleb Scott	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver, Potential Community Partner	Yes		4th	home school	Yes	Enrolling my student at The Gate School, Volunteer Opportunities	Word of Mouth	Safety, great teachers
10/29/2025 21:21:44	Alex Simmons	[REDACTED]	[REDACTED]	Yes	37205	Future parent	Yes				Yes	Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	
10/31/2025 8:31:52	Daniel Campbell	[REDACTED]	[REDACTED]	No	37069	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger	None	Yes	Enrolling my student at The Gate School	Word of Mouth	Education
10/31/2025 11:11:49	Kevin Cramer	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver	Yes		Pre-K or younger	First Steps	Yes	Free Tutoring	Word of Mouth	Education
10/31/2025 14:15:18	Caroline Rhodes	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver, Potential Staff Member, Community Member, Education Partner	Yes		Pre-K or younger, 1st	Ensworth & Children's House	Yes	Volunteer Opportunities	Word of Mouth	strong culture, rigorous academics, great community
11/1/2025 10:19:29	Kathy Leckrone	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes					TGS Newsletter	Word of Mouth	
11/1/2025 16:34:46	Liz Malugen	[REDACTED]	[REDACTED]	Yes	37206	Education Partner	Yes					Volunteer Opportunities, TGS Newsletter	Word of Mouth	
11/2/2025 8:08:51	Joseph Behling	[REDACTED]	[REDACTED]	Yes	37221	Education Partner	Yes					Volunteer Opportunities	Word of Mouth	
11/2/2025 11:45:59	Kelly Foster	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Word of Mouth	
11/2/2025 12:49:21	Jennifer McInerney	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member	Yes		8th, 10th	Saint Henry and Father Ryan	No	Volunteer Opportunities	Word of Mouth	Safety and education top tier
11/2/2025 14:18:35	Shelly Gaughan	[REDACTED]	[REDACTED]	Yes	37221	Potential Staff Member, Community Member, Education Partner	Yes				Yes	Volunteer Opportunities, TGS Newsletter	Word of mouth	
11/3/2025 9:46:25	Josh Gregory	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Community Member, Hype	Yes		Pre-K or younger, 2nd	Percy priest elementary	Yes	Volunteer Opportunities	Word of Mouth	Supportive community, great learning environment, great teachers
11/3/2025 10:13:36	Tyler Stone	[REDACTED]	[REDACTED]	Yes	37027	Parent/Guardian/Caregiver	Yes		5th	Valor	Yes	Enrolling my student at The Gate School, Volunteer Opportunities	Word of Mouth	Seeking a pathway toward a career or higher education
11/3/2025 12:35:09	Peter Connerth	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes						G	

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check al that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
11/5/2025 2:41:45	Taylor Barnes	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger			Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter	A friend	Get my kids into Bama
11/10/2025 12:22:24	Prentice Ashford	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes				No			
11/10/2025 13:14:50	Analese Lytle	[REDACTED]	[REDACTED]	No	40205	MNPS grad	Yes							
11/10/2025 14:09:41	Henry Varnell	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes				Maybe			
11/10/2025 15:58:35	Sean Cofoid	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		5th		Maybe			
11/10/2025 17:37:02	Rachel Hopkins	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes				No			
11/10/2025 19:20:50	Mary Kate Edwards	[REDACTED]	[REDACTED]	Yes	37212	Parent/Guardian/Caregiver	Yes				No			
11/10/2025 19:30:41	Lindsay Hess	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver, Community Member	Yes				No			
11/10/2025 21:02:55	Brett Michaels	[REDACTED]	[REDACTED]	Yes	37206		Yes		8th		Maybe			
11/11/2025 8:10:59	Jake Smith	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver, Community Member	Yes				No			
11/11/2025 8:13:21	John Ford	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes							
11/11/2025 13:31:27	Derrick Williams	[REDACTED]	[REDACTED]	Yes	37076	Parent/Guardian/Caregiver	Yes							
11/11/2025 15:47:10	Marguerite Ward	[REDACTED]	[REDACTED]	No	37027	Teacher/Educator, Community Member, Education Partner, Children's Ministry Coordinator	Yes							
11/11/2025 21:21:41	Clark Buckner	[REDACTED]	[REDACTED]	Yes	37209	Community Member	Yes							
11/12/2025 8:33:53	Tim Garrett	[REDACTED]	[REDACTED]	Yes	37215	Community Member, Industry Partner, Education Partner	Yes							
11/12/2025 12:46:12	Joshua Ireland	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver, Community Member, Industry Partner	Yes				No			
11/13/2025 9:46:59	Laura Bauer	[REDACTED]	[REDACTED]		37220	Parent/Guardian/Caregiver	Yes				No			
11/14/2025 12:03:50	Brittany Pridemore	[REDACTED]	[REDACTED]	Yes, No	37207	Parent/Guardian/Caregiver	Yes		5th, 6th	Rocketship	Yes	Enrolling my student at The Gate School, Free Tutoring	Burus	Different style of learning
11/15/2025 0:00:00	Alicia Frierson	[REDACTED]	[REDACTED]	Yes	37209	Parent	Yes		2nd, 4th, 8th		Yes			
11/15/2025 0:00:00	Brianna Jones	[REDACTED]	[REDACTED]	Yes	32206	Parent	Yes		1st,3rd		Yes			
11/15/2025 0:00:00	Cassie	[REDACTED]	[REDACTED]	Yes	37042	Parent	Yes		1,3		Yes			
11/15/2025 0:00:00	Delmis Portales	[REDACTED]	[REDACTED]	Yes	37013	Parent	Yes		2nd, 4th		Yes			
11/15/2025 0:00:00	Diamond Williams	[REDACTED]	[REDACTED]	Yes	37218	Parent	Yes		6th, 2nd, K		Yes			
11/15/2025 0:00:00	Judy Langat	[REDACTED]	[REDACTED]	Yes	37072	Parent	Yes		4th, 7th		Yes			
11/15/2025 0:00:00	Katilya Ward	[REDACTED]	[REDACTED]	Yes	37207	Parent	Yes		K, 3rd,		Yes			
11/15/2025 0:00:00	Nashauna Ellison	[REDACTED]	[REDACTED]	Yes	37209	Parent	Yes		2nd, 4th		Yes			
11/15/2025 0:00:00	Quaven Henderson	[REDACTED]	[REDACTED]	Yes	37207	Parent	Yes	Yes	3rd, 5th		Yes			
11/15/2025 0:00:00	Ralonda Gooch	[REDACTED]	[REDACTED]	Yes	37218	Parent	Yes		1st, 4th, 7th		Yes			
11/15/2025 0:00:00	Tamika Seagraves	[REDACTED]	[REDACTED]	Yes	37206	Parent	Yes							
11/15/2025 0:00:00	Tana Smith	[REDACTED]	[REDACTED]	Yes	37207	Parent	Yes		k, 5th		Yes			
11/15/2025 0:00:00	Tonyala Crowell	[REDACTED]	[REDACTED]	Yes	37218	Parent	Yes		1st, 3rd		Yes			
11/15/2025 0:00:00	Zy Taylor	[REDACTED]	[REDACTED]	Yes	37206	Parent	Yes		K, 2, 4th		Yes			
11/20/2025 8:30:10	Ariana Winton	[REDACTED]	[REDACTED]	Yes	37076	Potential Staff Member, Potential Community Partner	Yes					Volunteer Opportunities, TGS Newsletter	Word of Mouth	
11/21/2025 20:19:54	Sarah Soliman	[REDACTED]	[REDACTED]	Yes	37013	Community Member	Yes					Volunteer Opportunities, AI/Technology Camps	Derrick Williams	
11/30/2025 21:35:29	John Wyse	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver, Potential Community Partner, Education Partner	Yes		Pre-K or younger, Kindergarten	Montessori Academy	No	Enrolling my student at The Gate School, Volunteer Opportunities	Word of Mouth	skilled, kind, and engaging teachers; real-world and project-based learning; diverse community
12/2/2025 14:28:58	Matt Cooper	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Kindergarten	Waverly Belmont Elementary	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Burrus Cox	A school that supports academic, social, and emotional growth, and teaches kids to be kind and serve others.
12/3/2025 13:15:50	Christian Boyd	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver, Community Member	Yes		Kindergarten	Kings Academy	No		A Staff member	Community and Focus on my student.
12/9/2025 0:00:00	Ashlea Wright	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		3rd, 5th		Yes			
12/9/2025 0:00:00	Barbara Calloway	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		1st		Yes			
12/9/2025 0:00:00	Britney S.	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		1st		Yes			
12/9/2025 0:00:00	Ja'Kyra Webster	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		1st		Yes			
12/9/2025 0:00:00	Lakesha Cheeks	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		7th					
12/9/2025 0:00:00	Mallory Boykins	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		2nd, 4th		Yes			
12/9/2025 0:00:00	Mirade Jude	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes							
12/9/2025 0:00:00	Patricka Daly	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		K, 4th, 6th		Yes			
12/9/2025 0:00:00	Paula Lint	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes							
12/9/2025 0:00:00	Yolanda Clark	[REDACTED]	[REDACTED]	Yes	37221	Parent	Yes		2nd, 4th		Yes			
12/9/2025 9:58:04	Robin Lively	[REDACTED]	[REDACTED]	Yes	37115	Parent/Guardian/Caregiver	Yes		8th	Kipp College Prep	Yes	Enrolling my student at The Gate School, Free Tutoring	Word of Mouth	Academics and life skills
12/10/2025 13:00:23	Sherrhea Baker	[REDACTED]	[REDACTED]	Yes	37076	Parent/Guardian/Caregiver	Yes		3rd, 4th	Una Elementary	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	Learning ethics
12/23/2025 11:58:36	Jessica Owens	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Maybe		3rd	Westmeade	Yes	Enrolling my student at The Gate School, TGS Newsletter	Mailer	Location, Academics, Strong Faculty
12/24/2025 15:13:45	Jeff Conner	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		3rd	Gower	Yes		Mailer	
12/27/2025 16:43:19	Evan Jones	[REDACTED]	[REDACTED]	Yes	37221	Student	Yes		3rd	Harpeth Valley	No	Enrolling my student at The Gate School, AI/Technology Camps	Mail flyer	That my child feels safe. Is in an environment that will be most beneficial to learning.o
12/31/2025 10:56:31	Alina Kelly	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver, Student, Community Member	Yes		4th	Grower Elm	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Mail	Teacher who care for and value what they do for my child.
1/3/2026 18:23:25	Dominic Vizor	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver	Yes		3rd	Westmeade Elementary	Yes	Enrolling my student at The Gate School	Flyer to our home	A curriculum that challenges my son to fulfill his best learning potential and engages his academic curiosities.
1/8/2026 11:33:42	Gillian Stewart	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		Kindergarten, 2nd, 4th	Percy priest	Yes		Word of Mouth	Community
1/8/2026 11:33:44	Haley Markham	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger, 2nd, 4th, 6th	Percy priest, JT Moore	Yes	Enrolling my student at The Gate School	Word of Mouth	Individualized education

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check all that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
1/8/2026 11:34:28	Anna Maddux	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		4th, 5th	Percy Priest Elem	Yes		Word of Mouth	
1/8/2026 11:36:19	Allie Shields	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes		Kindergarten, 2nd, 4th	Glendale and Covenant	Yes	Volunteer Opportunities, TGS Newsletter	Word of Mouth	
1/8/2026 11:36:42	Rachel Codington	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes		Pre-K or younger, Kindergarten, 2nd, 4th	Percy priest	Yes		Word of Mouth	
1/8/2026 12:01:08	Toby Lowenfels	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		2nd, 4th	Percy priest elementary	Yes	Enrolling my student at The Gate School, Volunteer Opportunities	Word of Mouth	Community
1/8/2026 12:13:47	Jackie Osborne	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		Kindergarten, 1st, 4th, 5th	PPE	Yes	Enrolling my student at The Gate School, Free Tutoring, TGS Newsletter, AI/Technology Camps	Word of Mouth	Top notch education, new facility with activity options
1/8/2026 12:31:37	Jessica Peoples	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		4th	Percy priest, meigs	Yes	Enrolling my student at The Gate School	Word of Mouth	Good environment to promote learning
1/8/2026 13:18:25	Annie Kate Pons	[REDACTED]	[REDACTED]	Yes	37027	Parent/Guardian/Caregiver, Community Member	Yes		4th	Percy Priest Elementary	Yes	Enrolling my student at The Gate School, AI/Technology Camps	Word of Mouth	A learning environment that requires critical thinking, specific education tools for future employment, and a place that value movement and outdoor time. I want a place where my kids enjoy learning, not an environment that focuses just on testing.
1/8/2026 14:16:36	Alise Gregory	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		2nd	Percy priest	Yes	Enrolling my student at The Gate School	Word of Mouth	Community and great education
1/8/2026 16:21:31	Taylor Brown	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		4th		Yes		Word of Mouth	
1/8/2026 17:11:42	Mary Katherine Bouldin	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		Pre-K or younger, 3rd, 4th	Percy preist	Yes		Word of Mouth	No technology. Lots of outside time
1/8/2026 17:13:13	Marcy Burridge	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		4th	Percy Priest	Yes	Enrolling my student at The Gate School	Word of Mouth	Developing the child as a whole
1/8/2026 17:28:29	Renee Lewis	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Community Member	Yes		4th	Percy Priest elem & Lipscomb Academy	Yes		Word of Mouth	Safety and attention to detail
1/8/2026 18:38:18	Morgan Williamson	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		Pre-K or younger, Kindergarten, 4th	PPE	Yes	AI/Technology Camps	Alise Gregory	Academic Excellence & Emotional Intelligence
1/9/2026 11:27:53	Margaret French	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		4th		Yes	Enrolling my student at The Gate School	Word of Mouth	Free, diverse, low tech
1/9/2026 15:16:04	Anna Moore	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger	Woodmont Baptist Weekday Preschool	Yes	Enrolling my student at The Gate School	Word of Mouth	Holistic approach to education and wellness. Consideration of childhood development in establishing curriculum (I. e., prioritizing physical outlets for energy, and social/emotional development in addition to academics.
1/10/2026 12:27:54	Elle	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		4th	Sylvan park	Yes	Enrolling my student at The Gate School, Free Tutoring, TGS Newsletter, AI/Technology Camps	Social Media	
1/10/2026 15:09:39	Justine Schultz	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Julia Green	Yes		Word of Mouth	Strong community based school
1/11/2026 14:26:11	Saige Connor	[REDACTED]	[REDACTED]	Yes	37203	Potential Staff Member	Yes						Social Media	
1/12/2026 13:32:42	Viva Price	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver, Community Member	Yes		4th	B.E. Academy School for Girls	Yes	Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	Quality Instructors, Academically Rigorous, Personalized Path, Enjoyable Learning Environment
1/13/2026 15:05:12	Katie Truex	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes		2nd, 4th, 6th	Percy Priest, CPA	No		Word of Mouth	
1/13/2026 16:02:03	Maddie Waud	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes		Pre-K or younger, Kindergarten, 3rd, 4th	Waverly Belmont	Yes	Enrolling my student at The Gate School	Word of Mouth	Passionate faculty, smaller classroom setting
1/14/2026 6:18:52	Helen Beckner McDaniel	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver, Potential Community Partner	Yes		Pre-K or younger	The Acorn School at Vanderbilt	No	Enrolling my student at The Gate School, Free Tutoring, TGS Newsletter, AI/Technology Camps	Social Media	A safe, nurturing academic environment
1/14/2026 9:50:42	Martha Ray Willis	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		4th	Kings Academy	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter	Word of Mouth, Alise Gregory	Well rounded education from a Christ centered world view
1/14/2026 12:40:39	Kaleigh McRoberts	[REDACTED]	[REDACTED]	Yes	37207	Potential Staff Member	Yes						Word of Mouth	
1/15/2026 9:20:28	Beverly Weatherspoon	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		3rd, 5th	Harpeth Valley Elementary School	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Mailed invitation	My two daughters are very bright and are in the Gate program at their Elementary school. My husband and I both went to public schools and were in advanced programs. We want our children to also have that opportunity to achieve academic excellence and challenge their intellect.
1/19/2026 12:26:38	Madeline Frohrip	[REDACTED]	[REDACTED]	Yes	37211	Community Member	Yes					TGS Newsletter	Word of Mouth	
1/19/2026 12:27:54	Campbell Wouters	[REDACTED]	[REDACTED]	No	37069	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Pre-K or younger	Likely will attend New Hope Academy this fall	No	TGS Newsletter	Word of Mouth	Student teacher ratio. Unstructured time.
1/19/2026 12:28:38	Elizabeth Barnes	[REDACTED]	[REDACTED]	Yes	37205	Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Word of Mouth	
1/19/2026 12:30:35	Spencer England	[REDACTED]	[REDACTED]	Yes	37211	Community Member	Yes						Word of Mouth	
1/19/2026 12:41:43	Charlotte Wallace	[REDACTED]	[REDACTED]	Yes	37209	Potential Community Partner	Yes						Word of Mouth	
1/19/2026 12:49:02	Matthew Petrikin	[REDACTED]	[REDACTED]	Yes	37205	Community Member	Yes				Yes	TGS Newsletter	Social Media	
1/19/2026 13:15:04	Alyssa Patel	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes						The founder!!! Go Burrus go	

THE GATE SCHOOL
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INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check all that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
1/19/2026 13:16:23	Christina Johnson	[REDACTED]	[REDACTED]	Yes	37216	Community Member, Potential Community Partner, Education Partner	Yes						Social Media	
1/19/2026 13:43:49	Paul Caudill	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger	Westminster School for Young Children	Yes	Enrolling my student at The Gate School, Volunteer Opportunities	Word of Mouth	Structured Curriculum, engaged staff, community
1/19/2026 14:14:26	Gracie Sinks	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes					Volunteer Opportunities	Social Media	
1/19/2026 14:19:03	Kendall Cox	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver, Community Member	Yes				Yes		Word of Mouth	
1/19/2026 14:34:02	Vernon Holland	[REDACTED]	[REDACTED]	No	37072	Potential Community Partner	Yes						Social Media, Word of Mouth	
1/19/2026 14:42:58	Connor Siegel	[REDACTED]	[REDACTED]	Yes	37027	Potential Staff Member, Community Member	Yes						Founder	
1/19/2026 14:45:13	John Hazen	[REDACTED]	[REDACTED]	Yes	37204	Friend of school	Yes						Word of Mouth	
1/19/2026 16:08:54	Paul Garrard	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes				Yes		Word of Mouth, Website	
1/19/2026 16:35:56	Mary Eugenia Smith	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger			TGS Newsletter	Social Media, Word of Mouth	
1/19/2026 17:15:25	Merritt Fleming	[REDACTED]	[REDACTED]	Yes	37205	Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Social Media, Word of Mouth	
1/19/2026 17:42:50	Patrick Prevost	[REDACTED]	[REDACTED]	Yes	37209	Community Member	Yes				Yes	Volunteer Opportunities	Word of Mouth	
1/19/2026 18:27:26	Elizabeth Sherrard	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Community Member	Yes		2nd	Percy Priest Elementary		Enrolling my student at The Gate School	Social Media, Word of Mouth	Smaller classes and more individual attention to each student. Intentional and high quality teachers.
1/19/2026 20:35:09	JoAnne Berns	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		4th	Julia Green	Yes	Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Social Media	Rigorous academics and strong SEL
1/19/2026 20:48:04	Eva Landstreet	[REDACTED]	[REDACTED]	Yes	37205	Community Member	Yes						Social Media, Burrus Cox	Good teachers
1/19/2026 21:12:51	Claire Kirchoff	[REDACTED]	[REDACTED]	No	23222	Education Partner	Yes					TGS Newsletter	Social Media	
1/19/2026 21:13:50	Kelly Foster	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes					Volunteer Opportunities, TGS Newsletter	Word of Mouth	
1/19/2026 21:59:57	JoAnne Berns	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		4th	Julia Green	Yes	Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Social Media	Rigorous academics and strong SEL
1/19/2026 22:11:47	Sarah Addo	[REDACTED]	[REDACTED]	No	37146	Potential Staff Member, Community Member, Education Partner	Yes					Volunteer Opportunities	Social Media, Word of Mouth	
1/19/2026 23:25:26	Matthew Oh	[REDACTED]	[REDACTED]	Yes	37235	Community Member, Potential Community Partner	Yes					TGS Newsletter	Word of Mouth	
1/20/2026 13:51:37	Chris Barbic	[REDACTED]	[REDACTED]	Yes	37205	Community Member, Potential Community Partner, Education Partner	Yes					Volunteer Opportunities	Nahville Incubator	
1/22/2026 9:25:19	Emily Money	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Oak Hill School	No	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, AI/Technology Camps	Word of Mouth	Community
1/22/2026 9:25:51	Avery Stanley	[REDACTED]	[REDACTED]	Yes	37205	Student, Community Member, Potential Community Partner	Yes		Pre-K or younger, Kindergarten	St Paul Christian Academy	No	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth, Community Event	Hands-on learning experience
1/22/2026 9:36:27	Mallory Hart	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger	CPA	Yes	Enrolling my student at The Gate School	Word of Mouth	Diversity, compassion
1/22/2026 9:36:38	Annie Rivera	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		Pre-K or younger, Kindergarten, 2nd	percy priest elementary	No	Enrolling my student at The Gate School, TGS Newsletter	Word of Mouth	a challenging curriculum without religion.
1/22/2026 9:37:07	Janie Allgood	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger, 1st			Volunteer Opportunities	Word of Mouth	A good education in a safe environment
1/22/2026 9:38:02	Avery Stanley	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Pre-K or younger, Kindergarten	St. Paul Christian Academy	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	
1/22/2026 9:41:16	Anna Kaminski	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver, Student, Potential Staff Member, Community Member	Yes		1st	Julia Green	Yes	Enrolling my student at The Gate School	Word of Mouth	Character development and quality education
1/22/2026 9:48:45	Holly Clark	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Woodmont Baptist Weekday Preschool	No		Word of Mouth	Flexibility in achievement based on knowledge level. Exposure to broad ideas and understanding of differences.
1/22/2026 10:01:21	Lauren Saxena	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger, 1st	Percy Priest Elementary, Woodmont Baptist Weekday Preschool	Yes	Enrolling my student at The Gate School, TGS Newsletter	Word of Mouth	High quality education; positive, supportive environment
1/22/2026 10:15:02	Anna Young	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes		Pre-K or younger	First Pres	Yes		Word of Mouth	
1/22/2026 10:15:30	Jill Alexander	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes		9th	Franklin Road Academy	No	TGS Newsletter	Word of Mouth	Academics, safety
1/22/2026 10:22:03	Christine Molnar	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		2nd	Percy priest	Yes	Enrolling my student at The Gate School	Word of Mouth	Discussion based teaching
1/22/2026 10:28:42	Lauren Kendig	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		2nd	Percy Priest Elementary	Yes	Enrolling my student at The Gate School, Free Tutoring	Alise Gregory	A good solid education - understand what my child needs while learning
1/22/2026 10:31:47	Lindsey Norton	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver, Community Member, Potential Community Partner, Education Partner	Yes		Pre-K or younger	Oak Hill School, Woodmont Baptist Weekday Preschool	Yes	Enrolling my student at The Gate School	Word of Mouth	Solid education, loving and supportive environment
1/22/2026 10:58:54	Julieann Cate	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		Pre-K or younger, 2nd, 5th	Sylvan Park	Yes	Enrolling my student at The Gate School	Word of Mouth	Proximity, focused and engaging teachers, extra curricular, administrative focus on behavior
1/22/2026 11:42:02	Courtney Rooker	[REDACTED]	[REDACTED]	Yes	37214	Community Member, Education Partner	Yes				Yes	TGS Newsletter	Word of Mouth	
1/22/2026 12:34:20	Rachel Gregory	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes						Word of Mouth	

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INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check all that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
1/22/2026 12:54:47	Jaclyn Tidwell	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver, Community Member	Yes		1st	Waverly		Enrolling my student at The Gate School	Alise Gregory	
1/22/2026 13:24:43	Mary Cannon Swain	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver, Potential Community Partner	Yes		Pre-K or younger		Yes	Volunteer Opportunities	Word of Mouth	
1/22/2026 15:42:47	Ellery Murphy	[REDACTED]	[REDACTED]	Yes	37125	Community Member	Yes					Volunteer Opportunities	Word of Mouth	
1/22/2026 18:33:12	Debbie Gregory	[REDACTED]	[REDACTED]	Yes	37215	Community Member	Yes					TGS Newsletter	Word of Mouth	
1/22/2026 18:35:39	Robert Gregory	[REDACTED]	[REDACTED]	Yes	37218	Parent/Guardian/Caregiver, Potential Staff Member, Education Partner	Yes					Volunteer Opportunities	Word of Mouth	
1/22/2026 19:06:57	Grace Hazen	[REDACTED]	[REDACTED]	Yes	37204	Community Member	Yes						Friend	
1/22/2026 20:02:42	Yolanda Bivins	[REDACTED]	[REDACTED]	Yes	37207	Community Member, Potential Community Partner, Education Partner	Yes					Volunteer Opportunities	Word of Mouth, Demetria Giles	
1/22/2026 20:37:31	Hannah Feutz	[REDACTED]	[REDACTED]	Yes	37217	Community Member, Potential Community Partner, Education Partner	Yes					TGS Newsletter	Demetria Giles	
1/22/2026 21:12:46	DeMarco Fomby	[REDACTED]	[REDACTED]	Yes	37209	Community Member	Yes		7th	Meigs Middle School	Yes	Free Tutoring, Volunteer Opportunities	Word of Mouth	N/A
1/22/2026 21:19:43	T bizzle	[REDACTED]	[REDACTED]	Yes	37207	Exotic dancer	Yes		Pre-K or younger, Kindergarten, 12th	None	Yes	Free Tutoring, TGS Newsletter, AI/Technology Camps	Word of Mouth, Under duress	
1/22/2026 21:21:25	Anna Hayman	[REDACTED]	[REDACTED]	Yes	37220	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Woodmont Baptist weekday preschool	No	TGS Newsletter	Word of Mouth	Safety and education
1/22/2026 22:21:27	Michael Lowe	[REDACTED]	[REDACTED]	Yes	37013	Community Member,	Yes		Pre-K or younger		Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	Safe environment
1/23/2026 19:23:25	Nelson Graham	[REDACTED]	[REDACTED]	Yes	37205	Parent/Guardian/Caregiver	Yes		Pre-K or younger		Yes		Word of Mouth	Diverse student body that encourages children to explore their curiosities
1/24/2026 16:59:23	Stephenie Davis	[REDACTED]	[REDACTED]	Yes	37013	Community Member	Yes						Word of Mouth	
1/28/2026 16:58:07	Jamie Crawley	[REDACTED]	[REDACTED]	Yes	37207	Potential Community Partner	Yes					TGS Newsletter, AI/Technology Camps	Word of Mouth	
2/3/2026 11:19:56	Danielle Dorris	[REDACTED]	[REDACTED]	Yes	37210	Parent/Guardian/Caregiver, Community Member, Education Partner	Yes		Pre-K or younger	N/A - daycare	No	TGS Newsletter	Demetria Giles (Board Member)	Responsive educators, strong academic curriculum
2/3/2026 11:39:55	Valini Eatherly	[REDACTED]	[REDACTED]	No	37138	Parent/Guardian/Caregiver, Community Member, Ed Prep Program- Manager of Resident Development	Yes		2nd	Mt. Juliet Elementary School- we live on the county line	Yes	Enrolling my student at The Gate School, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	Student led and student centered learning opportunities, development of research and discourse skills in the age of AI, growth mindset and responsive instruction
2/4/2026 10:43:54	Shameka Smith	[REDACTED]	[REDACTED]	Yes	37013	Community Member	Yes					Volunteer Opportunities, AI/Technology Camps	Demetria Giles	NA
2/17/2026 15:30:52	Monique Hodison	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver	Yes		4th	Shayne	Yes	Volunteer Opportunities, AI/Technology Camps	Word of Mouth	Hands on Learning with the ability to teach to the child not the test
2/17/2026 15:42:58	Tiffany Ford	[REDACTED]	[REDACTED]	No	37040	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Schrader Lane Learning Academy	Yes	Volunteer Opportunities	Word of Mouth	A good healthy/loving environment. Getting an amazing education that will carry long term
2/17/2026 15:46:28	Jamiaya lancaster	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver			Pre-K or younger	Schader lane childcare	No	Free Tutoring, Volunteer Opportunities, AI/Technology Camps	Ms Monique	Smaller classes caring teachers who communicate parent engagement resources to help and big push in arts or sports
2/17/2026 15:46:58	Lauren Rolston	[REDACTED]	[REDACTED]	Yes	37207	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Waverly Belmont & Schrader Lane (Vine Hill)	Yes	Enrolling my student at The Gate School	Schrader Lane	That my child exceeds the Kindergarten milestones and learns daily social skills.
2/17/2026 15:47:23	Noel Ford	[REDACTED]	[REDACTED]	No	37040	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Schrader Lane Child Care Center	Yes	Enrolling my student at The Gate School, Volunteer Opportunities, AI/Technology Camps	Community Event	A curriculum that encourages curiosity and problem solving. As well as one that includes stem concepts and activities.
2/17/2026 15:56:27	Viva Price	[REDACTED]	[REDACTED]	Yes	37216	Community Member	Yes		Pre-K or younger, 5th	BE Academy	No	Free Tutoring, Volunteer Opportunities, AI/Technology Camps	Word of Mouth	Safe, supportive, engaging, trustworthy environment
2/17/2026 16:01:35	Holly Thompson	[REDACTED]	[REDACTED]	No	38401	Community Member	Yes						Word of Mouth	N.a
2/17/2026 18:01:21	Latoya McDaniel	[REDACTED]	[REDACTED]	Yes	37115	Parent/Guardian/Caregiver	Yes		3rd	Amqui	No	Free Tutoring	Word of Mouth	A safe environment with competitive academics
2/17/2026 19:14:12	Kristan Gipson	[REDACTED]	[REDACTED]	Yes	37115	Parent/Guardian/Caregiver, Community Member	Yes		Pre-K or younger, 3rd	3rd grade-Explore! Community School PreK4-Schrader Lane Vine Hill Child Care Center	No	Free Tutoring, Volunteer Opportunities, AI/Technology Camps	Word of Mouth, Ms. Monique, director of Schrader Lane Child Care Center	Giving students the opportunity to collaborate with each other daily is important for me as a parent of a school age student. I enjoy my son having a sense of community in school, which I think empowers him to ask more questions and participate in class more consistently. I enjoy partnering with teachers to help my kids grow at home and stay connected to the classroom.
2/17/2026 20:21:54	Michael Rohling	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		2nd, 3rd	Gower Elementary	Yes	Enrolling my student at The Gate School, Free Tutoring, AI/Technology Camps	Word of Mouth	Academics, extracurricular programs
2/17/2026 22:06:40	Dysha Weems	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver, Community Member, Potential Community Partner	Yes		Kindergarten	KIPP - Knight Drive	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, AI/Technology Camps	Word of Mouth	Support, Superior Curriculum, Communication
2/18/2026 11:39:25	Shonnekia Murphy	[REDACTED]	[REDACTED]	No	37167	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Schrader Lane	Yes	Enrolling my student at The Gate School	Schrader Lane	Education
2/20/2026 16:48:14	Victoria Green	[REDACTED]	[REDACTED]	Yes	37207	Parent/Guardian/Caregiver	Yes		8th			Free Tutoring, TGS Newsletter, AI/Technology Camps	Family member	A school that will make sure my child is taught and learning at grade level and beyond.

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check all that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
3/1/2026 16:00:57	Jackie Crawford	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver	Yes		Pre-K or younger, 4th	Glencliff Elementary	Yes	Enrolling my student at The Gate School	Word of Mouth	A focus on the whole child with opportunities to grow their strengths.
3/1/2026 16:23:09	Tynia Lloyd	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes		Pre-K or younger	Schrader Lane	Yes	Enrolling my student at The Gate School	Child's school	The quality of education for my developing child
3/3/2026 9:40:40	Steele McDonald	[REDACTED]	[REDACTED]	Yes	37209	Community Member	Yes						Word of Mouth	
3/4/2026 0:00:00	Shalimar Gates	[REDACTED]	[REDACTED]	Yes	37218	Parent/Guardian/Caregiver	Yes		2nd, 4th, 5th	Nashville Prep	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/4/2026 0:00:00	Steven Gates	[REDACTED]	[REDACTED]	Yes	37218	Parent/Guardian/Caregiver	Yes		4th	Nashville Classical	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/5/2026 0:00:00	Jackie Crawford	[REDACTED]	[REDACTED]	Yes	37211	Parent/Guardian/Caregiver	Yes		4th	Glencliff Entrepreneurship STEAM Magnet Elementary School	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/5/2026 0:00:00	Natara Garvin	[REDACTED]	[REDACTED]	Yes	37135	Parent/Guardian/Caregiver	Yes		3rd	Nolensville Elementary	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/8/2026 8:55:55	Candace Share	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		4th	Harpeth Valley Elementary	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter	Postcard in the mail	SEL, safety, discipline, curriculum & guidance
3/9/2026 0:00:00	Deehana King	[REDACTED]	[REDACTED]	Yes	37138	Parent/Guardian/Caregiver	Yes		4th	Andrew Jackson Elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/9/2026 17:49:50	Toyas Rudolph	[REDACTED]	[REDACTED]	No	37135	Potential Staff Member	Yes				Yes	Volunteer Opportunities, TGS Newsletter	Word of Mouth	
3/10/2026 0:00:00	Jenna Sissom	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		4th	Lipscomb Academy	Yes	Enrolling my student at The Gate School	Social Media	
3/18/2026 0:00:00	Eboni Lloyd	[REDACTED]	[REDACTED]	Yes	37013	Parent/Guardian/Caregiver	Yes		4th	Cane Ridge Elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/20/2026 14:36:52	Carlesha Bogle	[REDACTED]	[REDACTED]	Yes	37206	Student, Education Partner	Yes						Word of Mouth	
3/21/2026 0:00:00	Claire Coleman	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		3rd, 4th	Harpeth Valley Elementary	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/22/2026 0:00:00	Josie Decker	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		4th	Harpeth Valley Elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/22/2026 0:00:00	Madelynne Beck	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		4th	Gower Elementary	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/23/2026 0:00:00	Amit Kumar	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		4th	Gower Elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/23/2026 0:00:00	Kalyn Conner	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		4th	Gower Elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/23/2026 16:21:38	Rever Love	[REDACTED]	[REDACTED]	Yes	37208	Parent/Guardian/Caregiver,	No				No		Info shared	No
3/23/2026 16:23:42	Jacquelyn Polidore	[REDACTED]	[REDACTED]	Yes	37217	Education Partner	Yes					Volunteer Opportunities	Community Event	
3/24/2026 9:06:55	KeAisha Polk	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		3rd, 6th	Harpeth Valley	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities	Community Event	Outstanding Curriculum, After Care, Sports
3/24/2026 11:32:07	Mark Supalla	[REDACTED]	[REDACTED]	Yes	37212	Parent/Guardian/Caregiver	Yes		2nd	Eakin Elementary	Yes	Enrolling my student at The Gate School	Website	
3/24/2026 18:27:26	Brandy Wade	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver	Yes		3rd	East End Prep	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/24/2026 19:41:17	Kathryn Chance	[REDACTED]	[REDACTED]	Yes	37072	Parent/Guardian/Caregiver	Yes		3rd	Madison Creek Elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/24/2026 22:10:07	Jamie Mulholland	[REDACTED]	[REDACTED]	No	37064	Parent/Guardian/Caregiver	Yes		5th	Creekside Elementary	Yes	Enrolling my student at The Gate School	Google	A small school atmosphere with no bullying and focus on Christ based education
3/26/2026 9:10:32	Allyson Robinson	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver	Yes		4th	Dan Mills	Yes	Enrolling my student at The Gate School	Social Media	
3/26/2026 9:11:28	Allyson Robinson	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver	Yes		4th	Dan Mills	Yes	Enrolling my student at The Gate School	Website	
3/26/2026 22:25:07	Anya Fleming	[REDACTED]	[REDACTED]	Yes	37206	Parent/Guardian/Caregiver	Yes		3rd	Explore Elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/26/2026 23:27:31	Shamica Johnson	[REDACTED]	[REDACTED]	Yes	37076	Parent/Guardian/Caregiver	Yes		4th	Tulip Grove Elementary	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/27/2026 4:15:39	Allison Graber	[REDACTED]	[REDACTED]	Yes	37204	Parent/Guardian/Caregiver	Yes		4th	Glendale Elementary School	Yes	Enrolling my student at The Gate School	Word of Mouth	
3/27/2026 16:31:00	Dina Marks	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		4th	Harpeth Valley Elementary	Yes	Enrolling my student at The Gate School	Website	
3/28/2026 18:43:25	Khysar sultana	[REDACTED]	[REDACTED]	No	37122	Parent/Guardian/Caregiver	Yes		2nd	Rutland elementary	Yes	Enrolling my student at The Gate School	Social Media	
3/29/2026 21:08:21	Mustafa alsadeq	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		4th	Westmeade	Yes	Enrolling my student at The Gate School	Website	
3/31/2026 6:32:27	Adrienne Williams	[REDACTED]	[REDACTED]	Yes	37206	Parent/Guardian/Caregiver	Yes		5th	Rosebank Elementary	Yes	Enrolling my student at The Gate School	Word of Mouth	
4/1/2026 14:43:43	Donya Smith	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver, Potential Staff Member	Yes		Kindergarten, 6th	Invictus Nashville Charter & Donelson Middle	Yes	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Community Event	Nurturing Learning Environment, Bus availability
5/18/2026 15:48:26	Janasia Butler	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		5th	Harpeth valley elementary school	Yes	Enrolling my student at The Gate School	Community Event	A school she wants to show and up and learn from everyday
5/18/2026 21:11:10	Keaton Pittard	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		Kindergarten, 1st	Harpeth valley elementary	No	Enrolling my student at The Gate School, Free Tutoring, Volunteer Opportunities, TGS Newsletter, AI/Technology Camps	Word of Mouth	
4/3/2026 16:18:01	Laura Jones	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		4th	Gower Elementary	Yes	Enrolling my student at The Gate School	Social Media	
4/3/2026 14:54:17	Anna Maddux	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		4th	Percy Priest	Yes	Enrolling my student at The Gate School	Word of Mouth	
4/4/2026 12:37:30	Lisa Bortel	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		4th	Gower Elementary	Yes	Enrolling my student at The Gate School	Website	
4/9/2026 0:00:00	Tonisha Brown	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		1st, 5th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Jakrya Webster	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		2nd.4th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Victoria Ann Henderson	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		K, 4th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Markeya Clark	[REDACTED]	[REDACTED]	Yes	37221	Community Member	Yes		-		No	TGS Newsletter	Event	
4/9/2026 0:00:00	Latoya Barefield	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		1st		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Lakesha Cheeks	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		7th		No	Enrolling my student at The Gate School	Event	

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

INTEREST AND SUPPORT SURVEY

Timestamp	Name	Email	Phone number	Are you a Davidson County Resident	Zip Code	I am interested as a: (Check all that apply)	Do you support The Gate School opening as free public charter school in Davidson County?	Would you be interested in joining a community advisory board?	Parent Only: What grade level(s) is your child currently in?	Parent Only: What school(s) do your children currently attend?	I would be interested in enrolling my child in The Gate School in 2027 if it were to open:	I'd like to receive updates about (check all that apply):	How did you hear about The Gate School?	Parent Only: What are you looking for in a school for your child? What is most important to you?
4/9/2026 0:00:00	Levon McCathern	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		5th, 9th, 11th		No	TGS Newsletter	Event	
4/9/2026 0:00:00	Danyell Jackson	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		2nd, 4th, Middle School		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Makhaylee fiel	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		K,2nd		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Alice Brown	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		K,2nd, 5th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	A.J. Johnson	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		4th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Shannen Luscumb	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		2nd, 4th, 6th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Keenyatia Nicholson	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		1st, 4th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 0:00:00	Ashlea Wright	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		3rd,5th		Yes	Enrolling my student at The Gate School	Event	
4/9/2026 23:36:47	Lauren White	[REDACTED]	[REDACTED]	Yes	37215	Parent/Guardian/Caregiver	Yes		4th	Percy Priest	Yes	Enrolling my student at The Gate School	Word of Mouth	
4/10/2026 23:57:45	Tania sierra acosta	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		3rd	Westmeade	Yes	Enrolling my student at The Gate School	Flyer	
5/18/2026 0:00:00	Swethe Sakkari	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		6th		Yes	TGS Newsletter	Event	
5/18/2026 0:00:00	Carolyn Jackson	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		6th, 4th, 2nd		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	William Long	[REDACTED]	[REDACTED]	Yes	37216	Parent/Guardian/Caregiver	Yes		K, 3rd		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Selma Izadi	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		2nd, 4th		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Logan Wright	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		4th	Westmeade	Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Jay Williams	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		1st, 3rd		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Hilal Gadeers	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		8th, 6th, 4th		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Stacey Smith	[REDACTED]	[REDACTED]	Yes	37203	Parent/Guardian/Caregiver	Yes		4th		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Kandace Spotanski	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		2nd, 7th		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Jeff Blanc	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		1st		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Candace Brown	[REDACTED]	[REDACTED]	Yes	37221	Parent/Guardian/Caregiver	Yes		2nd,4th		Yes	Enrolling my student at The Gate School	Event	
5/18/2026 0:00:00	Michael Stewart	[REDACTED]	[REDACTED]	Yes	37209	Parent/Guardian/Caregiver	Yes		K, 4th		Yes	Enrolling my student at The Gate School	Event	

Attachment 1.2: Memorandum of Understanding (MOUs)
Evidence of Community Engagement

Contents of Attachments 1.2: Memorandum of Understanding (MOUs)

- Attachment 1.2 A: The Ensworth School
- Attachment 1.2 B: Rafiq R. Kalam Id-Din II, Esq.,
- Attachment 1.2 C: Shelby Goodfriend, Nashville Incubator Facilities Support
- Attachment 1.2 D: Vertex Education (Formerly EdTec)
- Attachment 1.2 E: Washington Latin Public Charter School

Attachments 1.2 A

The Ensworth School

Memorandum of Understanding (MOUs)

Evidence of Community Engagement

Memorandum of Understanding

Between Ensworth and The Gate School

Purpose

This Memorandum of Understanding (MOU) outlines a collaborative learning partnership between Ensworth School and The Gate School focused on advancing high-quality, discussion-based instruction through the Harkness Method. The partnership is intended to support professional learning, shared reflection, and instructional design while respecting each school's mission, faculty, and community.

Scope of Collaboration

Founding Years (Pre-Opening and Launch)

During The Gate School's founding and launch period:

- Ensworth will allow members of The Gate School founding team to observe classrooms and Harkness-style discussions for the purpose of professional learning and instructional design.
- Ensworth will allow the Founding Team to collaborate with Ensworth staff and faculty, as appropriate and mutually agreed upon, around considerations related to the implementation of the Harkness Method.
- Ensworth will reserve a limited number of spots for members of The Gate School founding team to attend the Ensworth Summer Harkness Institute, subject to availability and standard participation requirements.

Year 1 and Beyond

Following the launch of The Gate School, Ensworth School agrees to continue the partnership through the following activities, coordinated in advance:

- Ensworth will allow up to eight (8) TGS staff members to observe Ensworth classes and Harkness discussions up to two (2) times per academic year.
- Ensworth will reserve up to six (6) spots annually for TGS staff to participate in the Ensworth Summer Harkness Institute, subject to availability and standard participation requirements.

- As The Gate School launches and grows, Ensworth staff will be invited, on an optional basis, to observe TGS classrooms and engage in discussion around the adaptation of Harkness-style instruction in a public school context.
- Both schools will engage in periodic reflection conversations to share lessons learned from implementation in different educational settings, as mutually agreed upon.

Confidentiality and Intellectual Property

This is often the most critical section for the host school.

- **Proprietary Methodology:** Explicitly state that the host school's specific pedagogical techniques, lesson plans, and internal materials remain their intellectual property.
- **Non-Disclosure:** A commitment that the visiting school will not record (video/audio) or distribute the host school's internal documents without written consent.
- **Student Privacy:** Strict adherence to privacy laws, ensuring no student names, photos, or work samples are collected or shared.

Logistics and Safety

- **Background Checks:** Require that all visiting staff have cleared the necessary criminal background checks and "clearance to work with children" as required by local law.
- **Code of Conduct:** Visitors must agree to follow the host school's safety protocols, including check-in procedures and emergency drills.

Legal Protections

- **Limitation of Liability:** A "hold harmless" clause stating that the host school is not responsible for any injury or loss incurred by the visitors during their stay.
- **Termination:** The host school should reserve the right to end the visit immediately if the MOU terms are violated or if the presence of visitors becomes a distraction to the students.

Shared Norms and Expectations

Both schools agree to the following norms to ensure the integrity of the partnership:

- All classroom observations and collaborations are for professional learning purposes only and are non-evaluative.
- Scheduling of observations and meetings will be coordinated in advance to minimize disruption to instruction.
- Any insights shared externally will be high-level and will not identify individual teachers or classrooms without consent.

Ensworth School

Name: Prentice Stabler

Title: Head of School

Signature: Prentice Stabler Date: 01/15/2026

Prentice Stabler (Jan 15, 2026 13:24:53 CST)

The Gate School

Name: Burrus Cox

Title: Executive Partner

Signature: Burrus Cox Date: 01/15/2026

Burrus Cox (Jan 15, 2026 13:05:28 CST)

TGS and Ensworth MOU

Final Audit Report 2026-01-15

Created:	2026-01-15
By:	Katie Foley (foleyk@ensworth.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAAySOCb9IEFWLxJJAoSZDEuA6o0HOHPGu2

"TGS and Ensworth MOU" History

Document created by Katie Foley (foleyk@ensworth.com)
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Agreement completed.
2026-01-15 - 7:24:53 PM GMT

Adobe Acrobat Sign

Attachments 1.2 B

Rafiq R. Kalam Id-Din II, Esq.,

Memorandum of Understanding (MOUs)

Evidence of Community Engagement

RAFIQ R. KALAM ID-DIN II, ESQ.

STRATEGIC CONSULTING AGREEMENT

This Consulting Agreement (this "Agreement") is made effective as of December 1, 2025 (the "Effective Date"), by and between Rafiq R. Kalam Id-Din II, Esq., (the "Consultant"), and Burrus Cox, Founder of The Gates School ("Client").

1. **Consulting Relationship**. During the term of this Agreement, Consultant will provide consulting services to the Client as described on Exhibit A hereto (the "Services"). Consultant represents that Consultant is duly licensed (as applicable) and has the qualifications, the experience and the ability to properly perform the Services. Consultant shall use Consultant's reasonable best efforts to perform the Services in a timely and professional manner, such that the results are satisfactory to the Client.

2. **Fees**. As consideration for the Services to be provided by Consultant and other obligations, the Client shall pay to Consultant the amounts specified in Exhibit A hereto at the times specified therein.

3. **Term and Termination**. Term is specified in Exhibit A. Should either party default in the performance of this Agreement or materially breach any of its obligations under this Agreement, including but not limited to Consultant's obligations under the Confidential Information and Invention Assignment Agreement between the Client and Consultant referenced below, the non-breaching party may terminate this Agreement immediately if the breaching party fails to cure the breach within ten (10) business days after having received written notice by the non-breaching party of the breach or default.

In the event of such expiration or termination of this Agreement, Consultant shall be paid for any portion of the Services that have been performed prior to such expiration or termination. Consultant further agrees that all obligations under Sections 4, 6 (pursuant to its terms), 10 and 11 of this Agreement shall continue in effect after expiration or termination of the Agreement, and that Consultant will notify any future customers, potential customers or employers of Consultant's obligations under this Agreement and the Confidentiality Agreement, and that the Client will be entitled to notify any such person or entity of Consultant's obligations.

4. **Independent Contractor**. Consultant's relationship with the Client will be that of an independent contractor and not that of an employee. Nothing in this Agreement will in any way be construed to constitute Consultant as an agent, employee, or representative of Client.

(a) **No Authority to Bind Client**. Consultant acknowledges and agrees that Consultant and its Assistants have no authority to enter into contracts that bind the Client or create obligations on the part of the Client without the prior written authorization of the Client.

(b) **No Benefits**. Consultant acknowledges and agrees that Consultant and its Assistants shall not be eligible for any Client employee benefits and, to the extent Consultant otherwise would be eligible for any Client employee benefits but for the express terms of this Agreement, Consultant (on behalf of itself and its employees) hereby expressly declines to participate in such Client employee benefits.

(c) **Taxes; Indemnification**. Consultant shall have full responsibility for all applicable taxes for

all compensation paid to Consultant or its Assistants under this Agreement, including any withholding requirements that apply to any such taxes, and for compliance with all applicable labor and employment requirements with respect to Consultant's self-employment, sole proprietorship or other form of business organization, and with respect to the Assistants, including state worker's compensation insurance coverage requirements and any U.S. immigration visa requirements. Consultant agrees to indemnify, defend and hold the Client harmless from any liability for, or assessment of, any claims or penalties or interest with respect to such taxes, labor or employment requirements, including any liability for, or assessment of, taxes imposed on the Client by the relevant taxing authorities with respect to any compensation paid to Consultant or its Assistants or any liability related to the withholding of such taxes.

(d) **Warranties**. Consultant warrants that all materials delivered to the Client under this Agreement shall be original work and that all such materials will not violate any copyright, trade secret or any other proprietary rights of any third party. Consultant agrees to fully indemnify the Client, its directors, officers, agents, employees, investors, shareholders, administrators, affiliates, divisions, subsidiaries, predecessor and successor corporations, and assigns for all verdicts, judgments, settlements, and other losses incurred by any of them resulting from Consultant's breach of Consultant's obligations under any agreement with a third party to which Consultant is a party or obligation to which Consultant is bound (including, but not limited to, the breach of any third party's copyright, trade secret, or other proprietary rights), as well as any reasonable attorneys' fees and costs if the plaintiff is the prevailing party in such an action, except as prohibited by law.

5. **Confidentiality.** During the course of this Relationship, both Client and Consultant may disclose or have access to certain confidential, proprietary, or sensitive information ("Confidential Information"). Confidential Information includes, but is not limited to: internal documents, strategies, processes, data, organizational structures, financial information, designs, templates, lesson frameworks, professional rubrics, decision-making frameworks, staffing models, or any other non-public materials, whether in written, oral, or digital form. Both parties shall, at all times during the term of this Agreement and thereafter:

- hold the other Party's Confidential Information in the strictest confidence;
- not disclose such information to any third party without prior written consent; and
- not use such information except as necessary to perform or benefit from the Services under this Agreement.

Consultant retains all rights, title, and interest in and to any and all intellectual property, frameworks, methodologies, tools, templates, professional rubrics, leadership or staffing models, Teaching Firm–related designs or systems, codified practices, training materials, and any other creative or strategic work ("Consultant IP") developed by Consultant individually or in collaboration with Ember Charter Schools. No Consultant IP is being sold or transferred to Client under this Agreement. Client is granted a limited, non-exclusive, non-transferable, non-sublicensable license to use Consultant IP solely for Client's internal purposes and solely in connection with the project described in Appendix A.

Without Consultant's express written consent, Client shall not, and shall not permit others to:

- copy, distribute, share, publish, or disclose Consultant IP;
- modify, adapt, or create derivative works based on Consultant IP;
- use Consultant IP to advise, support, or develop work for any other school, organization, founder,

or third party;

- incorporate Consultant IP into materials intended for external distribution or commercial use;
- represent Consultant IP as Client's own intellectual property.

Upon request or termination of this Agreement, each Party will return or destroy the other Party's Confidential Information, except for archival copies retained for legal or administrative purposes. All confidentiality and IP obligations survive the termination or expiration of this Agreement.

6. **Governing Law**. The validity, interpretation, construction and performance of this Agreement, and all acts and transactions pursuant hereto and the rights and obligations of the parties hereto shall be governed, construed and interpreted in accordance with the laws of New York, without giving effect to principles of conflicts of law.

7. **Disputes**. Parties to agree to handle any dispute through a mediation process.

8. **Entire Agreement**. This Agreement (together with the exhibits hereto) sets forth the entire agreement and understanding of the parties relating to the subject matter herein and supersedes all prior or contemporaneous discussions, understandings and agreements, whether oral or written, between them relating to the subject matter hereof. The parties hereby acknowledge and agree that except as set forth in Exhibit A of this Agreement, Consultant is not entitled to any other payments, reimbursements or other monetary or other consideration from the Client or any of its affiliates for any services rendered to the Client.

10. **Electronic Delivery**. The Client may, in its sole discretion, decide to deliver any documents related to this Agreement or any notices required by applicable law or, if applicable, the Client's Certificate of Incorporation or Bylaws by email or any other electronic means. Consultant hereby consents to (i) conduct business electronically, (ii) receive such documents and notices by such electronic delivery and (iii) sign documents electronically and agrees to participate through an on-line or electronic system established and maintained by the Client or a third party designated by the Client.

The parties have executed this Consulting Agreement as of the dates indicated below, to be effective as of the Effective Date.

CONSULTANT

By: 

Date: December 8, 2025

Name: Rafiq R. Kalam Id-Din II, Esq.
Title: Consultant

CLIENT

By: Burrus Cox
Burrus Cox (Dec 15, 2025 10:29:34 CST)

Name: Burrus Cox

Title: Founder

Date: 15/12/2025

EXHIBIT A

A. Consultant: Rafiq R. Kalam Id-Din II, Esq.

B. Client: Burrus Cox, Founder—The Gates School

C. Fees: Project Fee: $7,500; Excess Hourly Rate: $500

D. Term: December 1, 2025 – February 15, 2026

E. Scope of Work. Consultant shall provide strategic advisory services to support to Burrus Cox as he designs and launches The Gates School in a manner that will enable him to implement the Consultant's and Ember Charter School's "Teaching Firm" model during The Gates School's founding and charter application process. The total engagement is estimated as outlined below, and shall focus on executive-level consulting and such necessary deliverables as outlined below by the final charter application deadline. Any additional consulting time required beyond what is estimated below shall be billed to Client by Consultant at the **Excess Hourly Rate** above and as mutually agreed to by Client and Consultant.

These scope of these advisory services shall include the following high-priority deliverable domains:

1. Foundational Model Frameworks and Resources. The Consultant will provide core intellectual property and organizational examples necessary for the Client to structure its operations based on the Teaching Firm model. This includes sharing expertise on how to structure resource-sharing mechanisms, establishing clear decision-making frameworks, developing essential professional rubrics for staff growth, and providing data and research supporting the model's effectiveness.

2. Charter Application Review and Strategic Feedback. The Consultant will conduct a targeted review of critical sections of The Gate School's charter application. The focus will be on ensuring the application presents a strong, viable plan for talent management and structure. This includes providing detailed feedback on:

    - The proposed leadership and staffing structure.
    - The strategy for recruitment and retention of high-performing teachers.
    - The proposed salary ranges, benefits, and incentive structures necessary to execute the model.

3. Strategic Advisory Meetings (Executive Coaching). The Consultant will conduct remote advisory sessions to address high-level strategic questions as The Gate School progresses. These are dedicated coaching and guidance sessions aimed at helping the Client navigate complex design, operational and integration issues, such as the successful management and integration of different leadership teams (e.g., Deans Team, Operations Team, and Partners).

4. Statement of Partnership and Support. The Consultant will draft and sign a formal Letter of Support and Statement of Partnership for the Client to include in their charter application packet. This statement will leverage the Consultant's expertise and success to strengthen The Gate School's credibility during the application review process.

Resource Sharing (examples) • Decision making frameworks • Professional Rubrics • Research and data on effectiveness of Firm Model	1 hour by 12/17/25
Review Application Sections & Provide Feedback re: Example Section Questions: • Describe the school's leadership and staffing structure. • Explain the school's strategy to recruit and retain high-performing teachers. Outline the school's proposed salary ranges, employment benefits, and any incentive structures	3-5 hours by January 1
1:1 Meetings to answer key questions & share expertise to guide our process Example: Integration of Deans Team, Ops Team and Partners	4-6 one hour Zoom Meetings between Mid-December and February 2, 2026
Letter of Support: A statement of partnership and support to include in our charter application	1 hour by January 1st.
Estimated Total:	**10-15 hours**

Burrs Cox + RK Consulting Agreement (December 2025)

Final Audit Report 2025-12-15

Created:	2025-12-08
By:	Rafiq Kalam Id-Din (rafiq@embercs.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAANlxN7z4WABbTTSYgNnlcg6UV4dXROiq8

"Burrs Cox + RK Consulting Agreement (December 2025)" History

Document created by Rafiq Kalam Id-Din (rafiq@embercs.org)
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Agreement completed.
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Adobe Acrobat Sign

Attachments 1.2 C

Shelby Goodfriend, Nashville Incubator Facilities Support

Memorandum of Understanding (MOUs)

Evidence of Community Engagement

Memorandum of Understanding (MOU)

Between: Nashville Incubator, by and through its Director of Facilities, Shelby Goodfriend ("Incubator") and The Gate School ("Fellow", "Founder", or "School")

Effective Date: July 3, 2025, with execution as of the date of last signature.

Term: This MOU covers facilities-related support provided by Nashville Incubator from pre-application through the School's early operating years.

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1. Purpose

This Memorandum of Understanding outlines the facilities-focused strategic, technical, and financial support that Nashville Incubator will provide to The Gate School throughout its fellowship period and into early operations.

This MOU reflects and documents facilities-related support that has been provided since the Effective Date, including work completed prior to the date of execution. The purpose of this support is to assist the School in identifying, securing, developing, and sustaining a facility that aligns with its educational model, budget, and long-term growth.

This MOU reflects a good-faith understanding of roles and expectations. Nashville Incubator serves in an advisory and support capacity and does not operate, manage, or control the School. Nothing in this MOU creates a legally binding partnership, joint venture, or fiduciary relationship. Additionally, Nothing in this MOU guarantees charter authorization, facility availability, financing, or project outcomes, and the School acknowledges that all facilities decisions involve inherent risk.

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2. Scope of Facilities Support by Phase

Phase I: Pre-Application Facilities Support

Timeframe: July 2025 through initial charter application submission

During Phase I, Nashville Incubator supports the School in building a clear, realistic, and well-informed facilities strategy to support charter authorization and early planning.

Facilities support may include:

- Development of an early facilities strategy aligned to the School's educational model, enrollment assumptions, and budget.
- Guidance on space needs, facility types, and phasing considerations
- Support articulating facilities plans and cost assumptions for charter or funding applications
- Review and feedback on facilities-related application sections and budgets
- High-level insight into local real estate feasibility and constraints
- Coordination of Facilities Vision Setting Site Visits to schools aligned with the School's educational model
- Development of a Facility Decision-Making Matrix to support the Fellow's understanding of the facility development process and the roles and responsibilities of all stakeholders, see "Exhibit A"
- Hosting of a Facilities Charrette to introduce the School to a range of facilities partners in a collaborative, roundtable format, see "Exhibit B"
- Collection and sharing of potential facilities partner profiles for review of qualifications and credentials, see "Exhibit C"

Phase II: Pre-Opening Facilities Support

Timeframe: February 1, 2026 through school opening

During Phase II, Nashville Incubator supports the School in advancing facilities planning and decision-making as the School prepares to open.

Facilities support may include:

- Ongoing facilities strategy advising to School leadership
- Support evaluating site options, including lease and purchase considerations
- Strategic review of letters of intent, leases, and other facilities-related agreements
- Guidance on build-out planning, timelines, and sequencing
- Support aligning facilities decisions with budget, enrollment ramp, and operational capacity
- Problem-solving support for facilities-related challenges during pre-opening

Nashville Incubator does not provide legal, architectural, engineering, or construction services, but may advise on and help coordinate the engagement of such professionals.

Phase III: Operating Years Facilities Support

Timeframe: From school opening through early operating years

During Phase III, Nashville Incubator provides continued advisory support as the School operates and stabilizes.

Facilities support may include:

- Strategic advisory support related to facilities performance and sustainability
- Guidance on facility modifications, expansion, or long-term planning
- Support evaluating future space needs as enrollment stabilizes or grows
- Advisory support on facilities-related budgeting and capital planning
- Thought partnership on long-term facilities strategy and risk management

Emergency Facilities Strategic Support
In the event of a facilities-related crisis, including but not limited to flooding, mechanical or building systems failure, severe weather events, or other incidents that materially impact facility operations, Nashville Incubator may provide emergency strategic support.

Emergency support may include:

- Strategic guidance on immediate response priorities and sequencing
- Support evaluating options for temporary mitigation or continuity of operations
- Assistance in coordinating communication among facilities consultants and stakeholders
- Advisory support related to recovery planning and next steps

Nashville Incubator's role during a facilities emergency is advisory in nature. The School retains responsibility for all emergency response actions, regulatory compliance, insurance coordination, contractor engagement, and safety decisions.

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3. Facilities-Related Financial Support

Nashville Incubator maintains a pool of funds designated to support Incubator fellows with facilities-related soft costs only. Nashville Incubator does not fund, reimburse, or directly pay for facilities-related hard costs under any circumstances.

During Phase I, Phase II, and Phase III, Nashville Incubator may, at its discretion, allocate funds to support facilities-related soft costs, including but not limited to planning, consulting, due diligence, design, permitting, feasibility studies, and other facilities-related strategic expenses aligned with the scope of support described in this MOU. Approval timelines are at the discretion of the Incubator and influenced by the internal review and funding availability.

Eligible Facilities-Related Soft Costs
Subject to advance approval, facilities-related soft costs that may be supported include, but are not limited to:

- Facilities planning and feasibility studies
- Space planning, test fits, and programming analysis
- Owner's representation or project management consulting
- Architectural, engineering, or design services
- Due diligence costs, including building inspections, environmental reviews, and code analysis
- Zoning, permitting, and entitlement consulting and application fees
- Facilities-related legal review limited to planning or transaction support
- Financial modeling or cost estimating related to facilities planning
- Market analysis, site evaluation, or real estate advisory services
- Temporary consulting support to advance facilities decision-making
- Facilities visioning activities, including site visits or charrettes
- Other facilities-related strategic or advisory expenses approved in writing in advance

Excluded Costs
Nashville Incubator will not fund, reimburse, or cover any hard costs, including but not limited to:

- Property acquisition or lease payments
- Construction, renovation, or tenant improvement costs
- Furniture, fixtures, or equipment
- Materials, labor, or contractor costs
- Utilities, maintenance, or operating expenses
- Insurance, taxes, or ongoing occupancy costs

Approval and Documentation
The total amount of facilities-related financial support is not allocated in advance and is not guaranteed. Any request for Nashville Incubator to cover or reimburse facilities-related expenses must be reviewed, approved, and agreed upon in advance by Nashville Incubator and documented in writing. Expenses incurred prior to such written approval, including expenses incurred prior to the execution of this MOU, are not eligible for reimbursement or coverage.

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4. Roles and Responsibilities

The Gate School
The School retains full authority and responsibility for all facilities-related decisions, project outcomes, and agrees to:

- Lead the overall vision, priorities, and strategic direction for the School's facility
- Make final decisions and approvals related to facilities, including site selection, scope, and timing
- Own and drive key facilities documents, including needs assessments, requests for proposals, contracts, and related materials
- Select vendors and execute agreements, with board approval as required
- Remain accountable to the School's board and broader mission
- Ensure that facilities decisions align with educational, operational, and financial priorities
- Participate in key meetings, site visits, and decision-making milestones
- Ensure that the facilities process remains on track and aligned with agreed-upon timelines
- Engage transparently with Nashville Incubator and share relevant facilities-related information
- Use any financial support solely for agreed-upon facilities-related purposes

Nashville Incubator *(Through its Director of Facilities, Shelby Goodfriend)*

Nashville Incubator serves in a consulting and strategic advisory capacity and will:

- Provide facilities expertise, strategic guidance, recommendations, and best practices
- Help shape and expand the Founder's thinking around space needs and feasibility
- Help the Founder navigate tradeoffs, risks, and sequencing
- Source potential vendor options and support the evaluation of proposals
- Review facilities-related documents and provide feedback, templates, and examples as appropriate
- Participate in meetings and site visits central to facilities planning to support informed decision-making
- Support coordination and communication among facilities stakeholders
- Support alignment of facilities work with overall project timelines and milestones
- Coordinate the review, approval, and documentation of any discretionary facilities-related soft cost funding described in Section 3.

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5. Working Relationship and Engagement

Nashville Incubator and the School agree to maintain regular communication and to revisit facilities plans as conditions, timelines, or constraints change. This MOU may be modified by mutual written agreement.

Active Partnership During Phase I and Phase II
During Phase I and Phase II, Nashville Incubator is an active partner in the School's facilities work and will participate directly in meetings that are central to facilities planning and decision-making. This includes meetings with facilities partners, finance partners, board members, and other stakeholders involved in the facility development process.

Nashville Incubator's participation in these meetings is intended to:

- Provide facilities expertise and context in real time
- Help the Founder navigate tradeoffs, risks, and sequencing
- Support clear communication among stakeholders
- Keep facilities work aligned with the School's goals, timelines, and constraints

Any feedback provided by Nashville Incubator on legal or transactional documents is for strategic context only and does not constitute legal advice.

Facilities Coaching

In addition to participating directly in meetings, Nashville Incubator will provide one-on-one facilities coaching to the Founder.

Facilities coaching shall occur according to the following schedule:

- Prior to submission of the charter application: bi-weekly coaching meetings
- From charter submission through school opening: weekly coaching meetings
- Following school launch: coaching available weekly, bi-weekly, or monthly based on School's needs

Following school launch, participation will align with the agreed-upon coaching cadence and the School's needs.

While Nashville Incubator plays an active and engaged role, the School retains final decision-making authority and ownership of all facilities-related decisions.

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6. Fees

There are no fees associated with the facilities coaching, advisory services, or support described in this MOU. All facilities-related coaching and services provided by Nashville Incubator under this agreement are provided at no cost to the School. Any financial support referenced herein relates solely to the potential coverage of approved facilities-related soft costs and does not constitute a fee-for-service arrangement.

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7. Interim Engagement of Facilities Consultants

Nashville Incubator may, at its discretion, retain facilities-related consultants, including but not limited to architects and owner's representatives, to provide interim support on behalf of the School prior to the School receiving charter authorization or having access to its own facilities funding. This interim support is intended to help maintain project momentum and ensure that early facilities planning and timelines remain on track.

The School acknowledges and agrees that:

- Any facilities consultants retained by Nashville Incubator during this interim period are engaged as advisors supporting the School and do not replace the School's obligation to conduct its own competitive procurement processes.
- The School remains responsible for complying with all applicable procurement requirements, including the use of a formal request for proposals process when required.
- Interim facilities consultants engaged by Nashville Incubator are expected to transition out or re-compete through the School's procurement process once the School is authorized and able to independently retain vendors.
- No interim engagement by Nashville Incubator obligates the School to retain any consultant beyond the interim period.

Nashville Incubator does not hold decision-making authority, does not execute contracts, and does not assume legal, financial, or construction responsibility for the project.

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8. Termination or Modification

Either party may modify or terminate this MOU with written notice. Any previously approved financial commitments will be honored according to their agreed-upon terms.

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9. Acknowledgment

For Nashville Incubator:

Name: Shelby Goodfriend
Title: Director of Facilities
Signature: Shelby Goodfriend
Shelby Goodfriend (Jan 29, 2026 10:19:58 CST)
Date: 29/01/2026

For The Gate School:

Name: Burrus Cox
Title: Executive Partner
Signature: Burrus Cox
Burrus Cox (Jan 29, 2026 10:22:34 CST)
Date: Burrus Cox
Burrus Cox (Jan 29, 2026 10:22:34 CST)

The Gate School Facility MOU without Exhibit C

Final Audit Report 2026-01-29

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By:	Shelby Goodfriend (shelby@nashvilleincubator.org)
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Agreement completed.
2026-01-29 - 4:22:34 PM GMT



Exhibit A
The Gate School Facility Decision-Making Matrix

THE GATE SCHOOL

The Gate School
Facility Decision-Making Matrix

PHASE 0: Assess School Needs and Define Team						
Item	The Gate School	Board	Nashville Incubator	Broker	General Counsel	Architect
	Burrus Cox & Jim Leckrone		Shelby Goodfriend	Avison Young	SRVH	HMK
Define instructional and operational facility requirements: Identify needs: square feet, location, amenities	Responsible for completion of template, informing broker of information for site search	-	Supports by creating template and consults though pushing to expand thinking to true minimum needs	Receives information from founder to conduct site search	-	Reviews and provides feedback to adjust
Source Real Estate Broker	Interview candidates provided and select one to move forward with	Must approve founder signing any exclusive agreement	Provide possible candidates	Interview with founder	-	-
Engage with Legal Counsel	Interview candidates provided and select one to move forward with	Must approve founder signing any agreement	Provide possible candidates	-	Provide representation agreement	-
Source Architect for Feasability Study	Interview candidates provided and select one to move forward with	-	Provide possible candidates	-	Review any agreements from architect	-

PHASE 1: Site Viability & Facility Acquisition								
Item	The Gate School		Nashville Incubator	Broker	General Counsel	Architect	Owner's Rep	General Contractors
	Burrus Cox & Jim Leckrone	Board	Shelby Goodfriend	Avison Young	SRVH	HMK	True North	Multiple
Source Viable Sites	Ultimate owner. Ensures broker provides survey, reviews sites, selects which sites to tour based on initial review	Receives updates, provides guidance to founder	Reviews broker survey with founder using viability framework	Owns process by creating survey of available sites that meets needs	-	Reviews sites in advance of touring to ensure initial viability of location	-	-
Conduct Initial Site Visit and Feasability Tour	Ensures that site meets legal and practical requirements based on Facility partners review of sites (eg. ADA, zoning, occupancy, safety, traffic flow, storm water, etc) Releases Architect to conduct full feasability review for top sites toured	Invited to attend	Hire and pay for Initial Architect and Owner's Rep for Phase 1 Support Supports by attending tour to translate specific construction language for founders, provide guidance regarding questions to ask, etc. Ensures site meets all legal and practial requirements. Flag any concerns to stakeholders.	Schedules tours of sites	Reviews any legal concerns flagged during site walk	Reviews site and plans for viability (ADA, zoning, occipancy, safety, traffic flow, storm water, etc) as well as school specific space needs. Complete full feasibility review upon request of founder.	Attends site walk	Attend site visit to gather data for initial pricing
Create Concept Drawings of Site	Review concept drawings against instructional and operational requirements. Provides feedback	-	Supports founder with review and feedback to stakeholders	-	-	Creates concept drawings of site	Review concept drawings against instructional and operational requirements. Provides feedback	Utilize concept drawings to gather data for initial pricing
Get Inital GC Pricing for Improvements	Reviews initial pricing and compare to budget targets	-	Review GC Pricing and provide support with founder analysis	Review GC Pricing and provide analysis for how to negotiate deal terms based on pricing	-	Provide answers to any questions from GC	Review GC Pricing and provide analysis to founder	Provide initial GC price estimate
Submit RFQ to Landlord	Reviews all drafts and revisions, provide feedback Inform board of RFQs going out to potential sites	-	Review RFQ and provide feedback ahead of submission	Creates RFQ and sends to stakeholders to review as requested by founder	Review RFQ and provide feedback ahead of submission	-	Review RFQ and provide feedback ahead of submission	-
Submit Letter of Intent (LOI) to Landlord	Reviews all drafts and revisions, negotiation points and sign final draft with single site	Must approve Founder signing	Reviews LOI and provides feedback	Creates LOI	Reviews LOI and provide feedback ahead of submission	-	Reviews LOI and provide feedback ahead of submission	-
Lease Agreement	Reviews all drafts and revisions, negotiation points and sign final draft with single site	Must approve Founder signing	Reviews lease and provides feedback	Reviews lease and provides feedback	Creates lease, supports with negotiation and ongoing edits to lease based on landlord feedback	-	Review lease and provide feedback ahead of submission	-

PHASE 2: Facility Planning								
Item		The Gate School		Nashville Incubator	General Counsel	Owner's Rep	Architect	General Contractors
		Burrus Cox & Jim Leckrone	Board	Shelby Goodfriend	SRVH	Selected in Phase 2	Selected in Phase 2	Multiple
Due Diligence Period		Review recommednations from architect with incubator to decide which diligence items are necessary to go forward with. Review proposals for due diligence needed Request Incubator covers payment for due diligence surveys or inspections needed	Approve any diligence items required per bylaws as needed if items exceed cost of Incubator soft cost grant	Review recommednations from architect and make recommendations to founder about which to go forward with. Review proposals for due diligence needed Pay for due diligence surveys or inspections needed	Provides risk assessment regarding property and which diligence items are highest priority	Gets proposals for additional due diligence needed Begins and leads weekly OAC meetings with stakeholders to ensure all facility partners are aligned	Leads diligence efforts and makes recommendations on needs based on codes and preliminary conversations	-
Undergo Request for Proposals (RFP)s for Services	Owner's Representative Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubuator. Vote to select Owner's Representative if required by bylaws, state and federal guidelines	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from owners rep who wins the bid Pay for services on behalf of school with incubator soft costs grant	Reviews RFP process to ensure compliance	Submits RFP	-	-
	Architectural Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder, Incubuator, and Owner's Rep. Vote to select Architect if required by bylaws, state and federal guidelines	Review proposals with founder and board and provide recommendation based on bids received.	Reviews RFP process to ensure compliance	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received	Submits RFP	-
	General Contractor Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder, Incubuator, Architect, and Owner's Rep. Vote to select General Contractor if required by bylaws, state and federal guidelines	Review proposals with founder and board and provide recommendation based on bids received.	Reviews RFP process to ensure compliance	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from architect who wins the bid	Reviews RFP before publishing Hosts walkthrough of building with general contractors	Submits RFP
	School Nutrition	Create RFP based on TDOE School Nutrition Procurement Procedures. Work with Nutrition office to ensure full compliance throughout process	Ensure compliance with TDOE School Nutrition Procurement process during RFP and selection. Vote to select Food Service Agency if required by bylaws, state and federal guidelines	Supports by providing context and connecting founder to resources	Reviews RFP process to ensure compliance	Attends walkthrough of site to ensure alignment between parties	Updated on type of food service to ensure space needs are met Attends walkthrough of site to ensure alignment between parties	-
	Cleaning Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubator Vote to select Cleaning Services Vendorif required by bylaws, state and federal guidelines	Supports by providing context and connecting founder to resources	Reviews RFP process to ensure compliance	-	-	Updated on scope of work needed for construction closeout and final deep clean
	IT Services	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubator Vote to select IT vendor if required by bylaws, state and federal guidelines	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from vendor who wins the bid	Reviews RFP process to ensure compliance	-	-	-
	Furniture Vendor	Review proposals and recommendations, make recommendation to board as required	Review RFPs and recommendations from Founder and Incubator Vote to select furniture vendor if required by bylaws, state and federal guidelines	Creates competitive RFP process including a rubric outlining minimum qualifications. Lead entire process. Review proposals and create recommendation for founder and board based on bids received Requests contract from vendor who wins the bid	Reviews RFP process to ensure compliance	-	-	-

PHASE 2: Facility Planning (Continued								
Review & Sign Contracts or Proposals for Services	Architectural Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback, negotiates with architect. If unable to come to resolution, involve attorney	Creates standard AIA contract	-
	General Contractor Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	Reviews contract and provides feedback	Creates standard AIA contract
	Owner's Representation Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Provide proposal and contract for review	-	-
	Food Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Ensure TDOE Nutrition team has active involvement and approves of final selection, and reviews contract prior to moving forward Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders. Ensure full compliance with TDOE process. Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	-	-	-
	Cleaning Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	-	-
	IT Services	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	-	-
	Furniture Vendor	Review contracts, ensuring legal has reviewed for compliance with bylaws, state, and local requirements. Sign contract upon review of facility stakeholders and approval from board	Review contracts and recommendations from Founder and stakeholders Vote to approve founder and/or board members signing of contract if required by bylaws, state, and federal guidelines	Reviews contract and provides feedback to stakeholders	Reviews contract, provides feedback, handles negotiations as necessary	Reviews contract and provides feedback	-	-
Complete schematic design and construction documents		Reviews CD set and provides feedback Keeps digital copy in school records	-	Reviews CD set and provides feedback	-	Reviews CD set and provides feedback	Creates CD set	Reviews CD set and provides feedback
Create Project Manual		Keeps digital copy in school records	-	Receives project manual	-	Distributes project manual	Creates project manual	Receives project manual

PHASE 3: Pre-Construction							
Item	The Gate School		Nashville Incubator	Owner's Rep	Architect	General Contractors	Furniture Vendor
	Burrus Cox & Jim Leckrone	Board	Shelby Goodfriend	Selected in Phase 2	Selected in Phase 2	Selected in Phase 2	Selected in Phase 2
Submit construction documents to local and state permitting agencies	Aware of status of process	-	Support as needed	Ensures all parties are collaborating as necessary	Submit construction drawings to State Fire Marshal and Local Codes Offices	Pick permitting up and expedite through process accordingly	-
Local Codes & Fire Marshal Plan Review	Aware of status of process	-	Supports as needed	Ensures all parties are collaborating as necessary	Holds preliminary conversations to prevent major barriers	Supports any barriers as needed	-
Finalize Construction Budget	Reviews and approve of any budget changes	Reviews and approves any budget changes as required by bylaws	Reviews all changes with founder to answer any questions	Reviews all changes and sends to founder for review and approval	Reviews all changes and shares any feedback with owner's rep and founder	Finalizes budget based on any changes required during permitting process	-
Order FF&E	Owner of entire process. Approves items to purchase and places order in alignment with timeline	Must approve any expenditure above threshold per bylaws	Supports by providing context, reviewing options, and connecting founder to resources	Aware of timeline to implement into overall project schedule	Provides context for any code restrictions based on building limitations. Provides CAD drawings to vendor	Aware of timeline to implement into overall project schedule	Provides pricing, options, and samples for FF&E. Ensures compliance with competitive procurement process
OAC Meetings	Attends OAC meetings as requested by Owner's Rep	-	Attends OAC meetings	Hosts weekly OAC meetings	Attends OAC meetings	Attends OAC meetings	Attends OAC meetings as needed

PHASE 4: Construction						
Item	The Gate School		Nashville Incubator	Owner's Rep	Architect	General Contractors
	Burrus Cox & Jim Leckrone	Board	Shelby Goodfriend	Selected in Phase 2	Selected in Phase 2	Selected in Phase 2
Owner, Architect, Contractor (OAC) Meetings	Attends OAC meetings as requested by Owner's Rep	-	Attends OAC meetings	Hosts weekly OAC meetings	Attends OAC meetings	Attends OAC meetings
Inspections	Gets updates regarding inspections, updates board as needed	Receives updates	Attend as needed	Attends all inspections	-	Manages all site inspections
Weekly Walkthroughs	Attends at least every other site walk	Invited at least once to do site walk	Attend weekly site walk	Schedules weekly site walk	Attend weekly site walk	Leads weekly site walk with updates regarding construction status
Change Orders	Reviews and signs change orders	Reviews all change orders and approves any above the threshold per bylaws	Reviews all change orders with founder to answer any questions	Reviews all change orders and sends to founder for review and approval	Reviews all change orders and shares any feedback with owner's rep and founder	Submits all change orders to Owner's Rep for review
Pay Applications	Reviews and signs pay application after both architect and owner's rep sign off Processes payment to general contractor	Reviews all pay applications as required per bylaws	Reviews all pay applications with founder to answer any questions	Reviews all pay applications and sends to founder for review, approval and payment processing	Reviews, approves and signs off on all pay applications based on work completed during most recent walkthrough	Submits pay application to architect and owner's rep for review and approval
Construction Punch	Attends punch walkthrough	-	Attends punch walkthrough	Leads punch walkthrough	Attends punch walkthrough	Attends punch walkthrough

PHASE 5: Final Inspections and Move-In							
Item	The Gate School		Nashville Incubator	Owner's Rep	General Contractors	Architect	Furniture Vendor
	Burrus Cox & Jim Leckrone	Board	Shelby Goodfriend	True North	Selected in Phase 2	Selected in Phase 2	Selected in Phase 2
Receive Use & Occupancy	Send U&O letter to authorizer	-	Attend final inspection as needed	Attend final inspection	Lead final inspection Request U&O letter from local codes office Send U&O letter to founder	Attend final inspection	-
Install FF&E and technology	Ensure all furniture is delivered free of damages prior to signing off on delivery	-	Support with any FF&E punch walk necessary	Confirm GC clean is complete and vendors are prepared to install Ensure all FF&E purchased is delivered	Ensure final clean is complete prior to installation	-	Complete installation of all FF&E and technology
Final Pay Application	Reviews and signs final pay application after both architect and owner's rep sign off, and all work is 100% complete Processes payment to general contractor	Reviews final pay applications as required per bylaws	Reviews final pay applications with founder to answer any questions	Reviews all pay applications and sends to founder for review, approval and payment processing	Submits pay application to architect and owner's rep for review and approval	Reviews, approves and signs off on all pay applications based on work completed during most recent walkthrough	-
Final closeout meeting (lessons learned)	Attend Meeting	-	Schedule lessons learned meeting and invite all facility vendors	Attend meeting	Attend meeting	Attend meeting	Attend meeting
Ribbon Cutting	Plans and executes ribbon cutting celebration for school launch	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting	Attends ribbon cutting

Exhibit B
Nashville Incubator Facility Charrette

INCUBATOR TENNESSEE

Nashville Incubator Facility Charrette Roundtable

Purpose: Introduce The Gate School and Music City Academy to potential facility partners and model the collaborative spirit that drives strong facilities projects

Purpose of the Charrette

Our goal is to introduce new schools to a range of facility partners in a collaborative, round table format. Rather than individual introductory meetings, these sessions give founders a real time sense of how architects, contractors, brokers, and owner's representatives work together to support school facility development. By the end of this round, founders will have met the partners in the room and gained useful insight into your approach, communication style, and role in a typical project.

Structure of the Session

The 90 minute block will follow a simple, consistent structure:

I. **School Vision Sharing**
Each school will have ten minutes to share their mission, program vision, facility needs, and priorities.

II. **Partner Introductions**
Each facility partner group will have **up to ten minutes** to introduce your organization, explain your role in a typical school facility project, and highlight how you support founders through the process.
Please allow time within your ten-minute block for questions.

III. **Collaborative Discussion**
The final portion of the meeting is open dialogue across all participants. Schools will ask clarifying questions, and partners can share insights, risks to consider, and opportunities to support strong design and development.

Presentation Logistics

A projector will be available if you would like to present slides. If you plan to use a slide deck, please email to **shelby@nashvilleincubator.org** by **9:00 AM on Monday, December 8**. I will load all decks and arrange them in the order of presenters.

Questions

If you have any questions about timing, materials, or the flow of the session, please feel free to reach out. Thank you again for participating. Your expertise and presence make these sessions valuable for our founders and set the stage for productive collaboration from day one.

Charrette Roundtable Day Agenda

Facility Charrette Agenda for The Gate School & Music City Academy		
Time	**What**	**Description**
10:40 AM	Arrival	**All fellows and staff must arrive by 10:40 AM**
10:50 - 11:00 AM	Charrette 1 Arrival	• Meeting to begin at 11 AM sharp
11:00 - 12:30 PM	Charrette 1	Charrette 1 Agenda
12:30 - 12:50 PM	Transition	**Transition between Charrettes**
12:50 - 1:00 PM	Charrette 2 Arrival	• Meeting to begin at 1 PM sharp
1:00 - 2:30 PM	Charrette 2	Charrette 2 Agenda
2:30 - 2:50 PM	Transition	• **Transition between Charrettes**
2:50 - 3:00 PM	Charrette 3 Arrival	• Meeting to begin at 3 PM sharp
3:00 - 4:30 PM	Charrette 3	Charrette 3 Agenda
4:30 PM - until the people leave	Transition	• **Transition after Charrettes**
↪	Closeout	• **After all potential partners leave, Shelby is to answer any questions you may have lingering**

Charrette Round 1

Facility Charrette 1 Participants			
Incubator Team			
Staff	Nashville Incubator	Shelby Goodfriend	Director of Facilities
		Scott Campbell	Executive Director
		Lisa Stone	Director of Fellows
Fellows	The Gate School	Burrus Cox	Founder
	Music City Academy	Kevin Dyson	Founder
		Bobbe Hill	Founder
Facility Partners			
Real Estate Broker	Avison Young	Jody Elder	Principal
		Jenna Muller	Principal
Architect	MZ Arch	Chris Riley	Architect, Co-Owner
		Ethan Levine	Architect, Co-Owner
General Contractor	DWC Construction	Tyler Glover	Director of Project Management
		Daniel Rebula	Senior Project Manager
Owner's Representative	Don Hardin Group	Tre Hardin	Business Development Manager

Facility Charrette 1 Agenda			
Time	**What**	**Description**	**Presenting**
10:50 - 11:00 AM	Arrival	Meeting to begin at 11 AM sharp	All
11:00 - 11:10 AM	Welcome & Framing	Opening remarks from Nashville Incubator Director of Facilities. Quick review of the flow for this round table	Shelby Goodfriend
11:10 - 11:20 AM	School Vision Sharing	Founders share their school vision	The Gate School
11:20 - 11:30 AM			Music City Academy
11:30 - 11:40 AM	Partner Group Introductions	Partners to introduce their role in a typical facility project and how they support schools	Avison Young
11:40 - 11:50 AM			MZ Arch
11:50 - 12:00 PM			Don Hardin Group
12:00 - 12:10 PM			DWC Construction
12:10 - 12:30 PM	Collaborative Discussion & Questions	Clarifying questions will be focused on helping schools understand each partner's approach, communication style, and alignment with their mission.	All
12:30 PM	Closeout	Thank you and adjourn	Shelby Goodfriend

Charrette Round 2

Facility Charrette 2 Participants			
Incubator Team			
Staff	Nashville Incubator	Shelby Goodfriend	Director of Facilities
		Scott Campbell	Executive Director
		Lisa Stone	Director of Fellows
Fellows	The Gate School	Burrus Cox	Founder
	Music City Academy	Kevin Dyson	Founder
		Bobbe Hill	Founder
Facility Partners			
Architect	HMK Architects	Logan Newton	Principal
		Beth Kickirillo	Founding Principal
General Contractor	Moffitt Builders	Ross Moffitt	Owner, Senior Project Manager
		Robert Maxwell	Project Manager
Owner's Representative	Matter	Alex Weis	Founder, CEO
		Samir Kothari	Project Manager
Finance	Raymond James	Hanna Degen	Vice President

Facility Charrette 2 Agenda			
Time	**What**	**Description**	**Presenting**
12:50 - 1:00 PM	Arrival	Meeting to begin at 11 AM sharp	All
1:00 - 1:10 PM	Welcome & Framing	Opening remarks from Nashville Incubator Director of Facilities. Quick review of the flow for this round table	Shelby Goodfriend
1:10 - 1:20 PM	School Vision Sharing	Founders share their school vision	The Gate School
1:20 - 1:30 PM			Music City Academy
1:30 - 1:40 PM	Partner Group Introductions	Partners to introduce their role in a typical facility project and how they support schools	HMK Architects
1:40 - 1:50 PM			Raymond James
1:50 - 2:00 PM			Matter
2:00 - 2:10 PM			Moffitt Builders
2:10 - 2:30 PM	Collaborative Discussion & Questions	Clarifying questions will be focused on helping schools understand each partner's approach, communication style, and alignment with their mission.	All
2:30 PM	Closeout	Thank you and adjourn	Shelby Goodfriend

Charrette Round 3

Facility Charrette 3 Participants			
Incubator Team			
Staff	Nashville Incubator	Shelby Goodfriend	Director of Facilities
		Scott Campbell	Executive Director
		Lisa Stone	Director of Fellows
Fellows	The Gate School	Burrus Cox	Founder
	Music City Academy	Kevin Dyson	Founder
		Bobbe Hill	Founder
Facility Partners			
Architect	Southern Architecture Workshop	Neil Parrish	Owner
		Eric Hawkins	Associate Principal
General Contractor	DF Chase	John Morss	Chief Operating Officer
Owner's Representative	True North Advisory	Scott Gibson	Partner

Facility Charrette 3 Agenda			
Time	**What**	**Description**	**Presenting**
2:50 - 3:00 PM	Arrival	Meeting to begin at 11 AM sharp	All
3:00 - 3:10 PM	Welcome & Framing	Opening remarks from Nashville Incubator Director of Facilities. Quick review of the flow for this round table	Shelby Goodfriend
3:10 - 3:20 PM	School Vision Sharing	Founders share their school vision	The Gate School
3:20 - 3:30 PM			Music City Academy
3:30 - 3:40 PM	Partner Group Introductions	Partners to introduce their role in a typical facility project and how they support schools	Southern Architecture Workshop
3:40 - 3:50 PM			DF Chase
3:50 - 4:00 PM			True North Advisory
4:00 - 4:30 PM	Collaborative Discussion & Questions	Clarifying questions will be focused on helping schools understand each partner's approach, communication style, and alignment with their mission.	All
4:30 PM	Closeout	Thank you and adjourn	Shelby Goodfriend

INCUBATOR TENNESSEE

EXAMPLE QUESTIONS

Questions for All Facility Partners

These questions help schools understand each partner's approach, communication style, and alignment with their mission.

1. How do you typically collaborate with schools during early planning?
2. What does a strong working relationship look like from your perspective?
3. What information is most helpful for you to know during the visioning and feasibility phase?
4. What red flags or risks do you watch for early in a project?
5. How do you ensure transparency around budget, scope, and timeline?
6. How do you approach communication during the project?
7. Can you share an example of a successful school project and what made it work?
8. What challenges have you helped schools navigate in past facilities projects?
9. How do you think about supporting mission-driven organizations?
10. What should founders expect from you during a typical OAC meeting?

Questions for Architecture Firms

1. How do you approach understanding a school's instructional model and translating it into space?
2. How do you balance design aspirations with real-world budget constraints?
3. What is your process for incorporating program changes or feedback once the project is already moving?
4. What tools do you use to help founders visualize early concepts?
5. How do you coordinate with the general contractor early to reduce surprises later?
6. How do you plan for school growth, phased development, or future flexibility?

Questions for Owner's Representatives

1. How do you advocate for the school during budget, schedule, and scope decisions?
2. How early should an owner's rep be involved for maximum impact?
3. What does your role look like during design, during construction, and after move in?
4. What is your approach to managing competing priorities and keeping teams aligned?
5. How do you evaluate whether partners are staying accountable to the project plan?
6. How do you communicate risks or decisions that founders need to understand quickly?
7. How do you help founders understand technical decisions without overwhelming them?
8. How do you identify cost-saving opportunities that do not compromise program quality?

Questions for Real Estate Brokers
1. What factors do you evaluate when determining if a site is right for a school? 2. How do you help schools weigh tradeoffs when choosing between multiple sites? 3. What site conditions most affect cost or timeline? 4. How do you gather and share information about landlords, zoning, and permitting for each site? 5. What should founders expect during lease negotiation? 6. How do you manage communication between property owners, partners, and the project team? 7. How do you help schools negotiate for tenant improvements or favorable lease terms? 8. How do you collaborate with architects and contractors during site selection to avoid surprises later?

Questions for Finance Partners
1. How early should founders engage in financing conversations? 2. What financing structures are most common for first time charter school projects? 3. What factors most influence a school's borrowing capacity? 4. How do you help founders anticipate cash flow needs at different project stages? 5. What are the biggest drivers of risk from a lender perspective? 6. How do you support schools in balancing long term affordability with short term feasibility?

Questions for General Contractors
1. How do you determine cost ranges early in a project when drawings are still conceptual? 2. What strategies do you use to avoid cost escalation during construction? 3. How do you coordinate with the architect to prevent design surprises? 4. What is your preferred communication rhythm during active construction? 5. Where do school projects most commonly get off track, and how do you prevent that? 6. How do you incorporate school schedules (holidays, summer timelines) into your planning?

Exhibit C
Potential Facility Partner Profile

Potential Facility Partner Profiles

Real Estate Brokers

AVISON YOUNG
Avison Young
Presentation of Charter
School Services
INCUBATOR
NASHVILLE
Nashville Incubator Facility MOU
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COMPANY OVERVIEW

Avison Young creates economic, social and environmental value as a global real estate advisor, powered by people.

At Avison Young, we believe in creating positive impact wherever we go.

There is a vital role for commercial real estate to create healthy, productive workplaces for employees, cities that are centres of prosperity for its citizens, and built spaces and places that create a net benefit to the economy, the environment and the community.

Our nimble, agile team has global insight, local market expertise and access to some of the smartest technology in the commercial real estate industry – all at the ready to work on creating your competitive advantage. As a private company, you will collaborate with an empowered partner who is invested in your success as much as you are.

Our Vision

Today more than ever, anyone engaged in real estate needs data, technology and consultative solutions to achieve their unique, rapidly transforming goals. Harness the collective intelligence of a company powered by its people.

Our Purpose

At Avison Young, we're driven by a common purpose to create real economic, social and environmental value, powered by people.

Your Partner

A proactive partner invested in your success. The right mix of around-the-corner knowledge and multi-national expertise. Teams backed by the best intelligence technology. A long view of our relationship where your interests come first.

AVISON YOUNG

COMPANY OVERVIEW



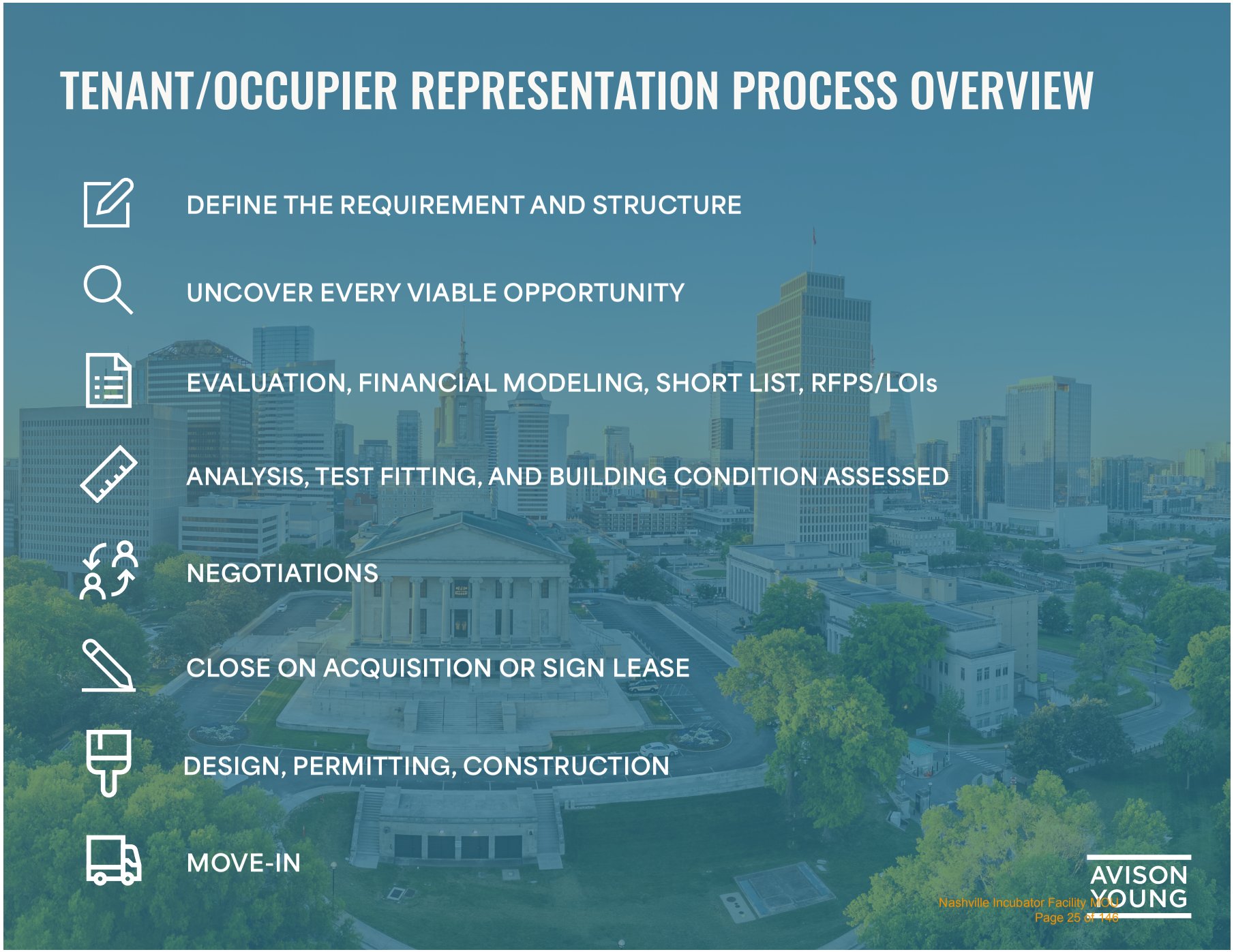
5,000	21	283 msf	100+
real estate professionals	countries	under property management	offices

AVISON YOUNG

ORGANIZATIONAL STRUCTURE



AVISON YOUNG


TENANT/OCCUPIER REPRESENTATION PROCESS OVERVIEW
DEFINE THE REQUIREMENT AND STRUCTURE
UNCOVER EVERY VIABLE OPPORTUNITY
EVALUATION, FINANCIAL MODELING, SHORT LIST, RFPS/LOIs
ANALYSIS, TEST FITTING, AND BUILDING CONDITION ASSESSED
NEGOTIATIONS
CLOSE ON ACQUISITION OR SIGN LEASE
DESIGN, PERMITTING, CONSTRUCTION
MOVE-IN
AVISON YOUNG

WHO WE ARE

A Purpose-Driven Team of Strategic Consultants

JODY F. ELDER
Principal
Tenant Rep
25 YEARS
Client lead

JENNA MULLER
Principal
Tenant Rep
20 YEARS
Client lead

KEITH KNOX
Principal and President
Occupier Services
26 YEARS

BRENNAN FORSTER
Senior Insight Analyst
Research
13 YEARS

RICK YBARRA
Principal
Consulting & Advisory
20 YEARS

Executive Leadership

HARRY KLAFF
Principal,
President, U.S.

LISA MAKI
Principal,
Managing Director
Capital Markets, Nashville

AVISON YOUNG

TEAM LEADS



Jody F. Elder, CCIM
Principal

Jody F. Elder is a Principal at Avison Young and specializes in representing office users in their office space needs. A 25-year industry veteran, his expertise includes tenant representation, leasing, purchases / sales, financial analysis, subleasing / lease buy-outs and aligning strategic planning with real estate solutions.

Prior to joining Avison Young in 2015, Jody was a Principal at Cushman & Wakefield | Cornerstone Commercial. His focused and strategic approach to representing his clients' interests, combined with decades of extensive experience in the Greater Nashville office market, has resulted in a long-standing track record of creating value for a long and growing list of repeat clients of all shapes and sizes. Jody heads a team in the Nashville office.



Jenna Muller, CCIM, SIOR
Principal

Jenna Muller is a Principal and leader in the Nashville Office Brokerage Group of Avison Young. Over the course of her career, she has represented clients in over $1.4 billion in office transactions totaling 5 million square feet. She acts as a strategic advisor to her clients, bringing deep expertise in office leasing and tenant representation, combined with a broad knowledge of real estate through experience spanning two decades.

After starting her commercial real estate career in Washington, DC, she became known as a leading commercial real estate advisor in Nashville, where she has built strong relationships for the past nine years while representing transformative real estate investors and leading companies. Her diverse perspective, combined with deep market knowledge, has translated into a proven track record of executing her clients' strategic objectives and delivering results that positively impact the bottom line.

AVISON YOUNG

EDUCATION AND NON-PROFIT CLIENT LIST

We have provided tenant representation or consulting expertise on new facilities (for both leases and acquisitions) to all the schools listed below.

Alive Hospice

All Saints Church

American Type Culture Collection

Celebree Schools

Christ Presbyterian Church

Crosspoint Community Church

First Five Years Fund

Fund For Peace

Gigi's Playhouse

Innovage

Invictus Nashville - Charter School

March of Dimes

Maryland Choices

MedStar Health

Montessori Kids Universe

National Association of Letter Carriers

National MS Society

Order of Malta

Nurses Middle College

South College

Taproot Foundation

The Covenant School

The Nature Conservancy

The Rock Academy - Charter School

World Relief

AVISON YOUNG

Potential Facility Partner Profiles

Strategic Advisors & Owner's Representatives

TRUE NORTH Advisory

Firm Overview

True North Advisory was founded on the simple premise to lead the delivery of high-quality projects with exceptional precision, excelling in complex developments that require a high degree of coordination and alignment among stakeholders.

We see our role through a variety of lenses – sometimes that is as a facilitator, an organizer, or a translator. We understand what it takes to set up and execute complicated projects, and that often comes down to a few key principles –

- Knowing how success is defined and ensuring that all decisions are made with the success as the focus for those decision points.
- Ensuring that the 'right' team is assembled – ensuring those partners have the proper experience and capacity to execute effectively.
- Bringing forward good information for the stakeholders to make decisions.
- Identifying – then removing obstacles that prevent the talented team from executing at a high-level.

Our team has a wide range of experience with educational facilities ranging from Pre-K to higher education. Our most recent educational facility project was the successful completion of a charter school in Nashville, Tennessee, where we provided end-to-end support for facility planning and development: from consultant procurement and preconstruction leadership to development budget and proforma support, design and schedule oversight, permitting strategy, cost estimating, value engineering, and contract negotiation. Throughout construction, we deliver disciplined oversight of submittals, RFIs, schedules, budgets, change management, jobsite inspections, and payment applications.

We anticipate that Scott Gibson will serve as Principal-in-Charge, providing overall leadership, strategic oversight, and client engagement throughout the project. Danielle Kohnen and Emily Mayes will support the effort as Senior Project Managers, working closely with the owner and project team to manage day-to-day coordination, scheduling, budgeting, and communication to ensure the project is delivered efficiently and in alignment with project goals.

True North Advisory was founded on the simple premise to lead the delivery of high-quality projects with exceptional precision, excelling in complex developments that require a high degree of coordination and alignment among stakeholders.

We see our role through a variety of lenses – sometimes that is as a facilitator, an organizer, or a translator. We understand what it takes to set up and execute complicated projects, and that often comes down to a few key principles –

- Knowing how success is defined and ensuring that all decisions are made with the success as the focus for those decision points.
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- Bringing forward good information for the stakeholders to make decisions.
- Identifying – then removing obstacles that prevent the talented team from executing at a high-level.
-

Our team has a wide range of experience with educational facilities ranging from Pre-K to higher education. Our most recent educational facility project was the successful completion of a charter school in Nashville, Tennessee, where we provided end-to-end support for facility planning and development: from consultant procurement and preconstruction leadership to development budget and proforma support, design and schedule oversight, permitting strategy, cost estimating, value engineering, and contract negotiation. Throughout construction, we deliver disciplined oversight of submittals, RFIs, schedules, budgets, change management, jobsite inspections, and payment applications.

We anticipate that Scott Gibson will serve as Principal-in-Charge, providing overall leadership, strategic oversight, and client engagement throughout the project. Danielle Kohnen and Emily Mayes will support the effort as Senior Project Managers, working closely with the owner and project team to manage day-to-day coordination, scheduling, budgeting, and communication to ensure the project is delivered efficiently and in alignment with project goals.

Scott Gibson P.E., S.E., LEED AP



PARTNER

18 Years in the Industry

Mercer University – May 2015
MBA, Master of Business Administration

Auburn University – May 2007
BCE, Bachelor of Civil Engineering

Professional Engineer: TN, GA
Structural Engineer: GA
LEED Accredited Professional
OSHA 30 Hour Certified

Scott joined True North Advisory in 2023 and brings a broad background in structural engineering, construction, and development. He provides practical, solution-oriented guidance that helps clients navigate complex decisions with clarity and confidence.

With a focus on preconstruction and planning, Scott has supported educational and institutional projects through consultant coordination, budgeting and proforma support, design and schedule oversight, permitting strategy, cost estimating, value engineering, and GMP development. He has also prepared cost studies and detailed estimates that help owners evaluate options and manage risk early.

Scott is a collaborative leader who values strong relationships, builds effective teams, and is committed to delivering well-planned, successful projects.

SELECT PROJECT EXPERIENCE

Nashville Classical West
Planning & teaming

Invictus Nashville Charter School
Consultant procurement, preconstruction leadership, development budget & proforma support, design & schedule oversight, permitting strategy, cost estimating, value engineering, and contract negotiation.

Western Kentucky University - Cherry Hall
Historic academic building renovation

Western Kentucky University - Gordon Wilson Hall
Improved circulation and inclusion of elevator

Murray state university veterinary sciences building
Cost Consulting

Middle Tennessee State University Parking Garage
Cost consultant for on-campus parking structure

Scott Gibson – P.E., S.E., LEED AP
TN P.E. License 119566 (Exp. 12/20/26)
GA S.E. License SE000482 (Exp. 12/31/26), GA P.E. License PE037653 (Exp. 12/31/26)
Partner, 18 Years in the Industry
Mercer University – May 2015
MBA, Master of Business Administration
Auburn University – May 2007
BCE, Bachelor of Civil Engineering

Scott joined True North Advisory in 2023 and represents a wide range of design and construction experience and uses his diverse background to provide solution-oriented guidance to all clients. Scott's unique perspective is a culmination of extensive experience in structural engineering, construction, and development.
While his experience spans all phases of design and construction, Scott specializes in preconstruction and planning to facilitate decision making and set-up of complex construction projects. He firmly believes in positioning each project with the right teams and empowering each team member to perform at their highest level. With a passion for learning, Scott stays at the forefront of industry advancements, enabling him to implement innovative solutions. He is a proven leader, fostering collaboration and driving excellence in every endeavor.

LEGISLATIVE PLAZA
Cost studies and in-house estimating for a multi-phase renovation with a budget in excess of $100M

MIDDLE TENNESSEE STATE UNIVERSITY - PARKING GARAGE
Cost consultant for on-campus parking structure

WESTERN KENTUCKY UNIVERSITY - CHERRY HALL
Historic academic building renovation

WESTERN KENTUCKY UNIVERSITY - GORDON WILSON HALL
Improved circulation and inclusion of elevator

EDGEHILL MASTERPLAN
Conducted an independent 3rd party cost analysis to support design efforts on the infrastructure of the Edgehill Neighborhood Plan

EASTWORKS
Cost analysis and GMP preparation for a 284 unit for-rent multifamily project with a precast parking deck and retail

OLD LIBRARY AND ARCHIVES AND SUPREME COURT RENOVATION - TENNESSEE
Program verification opinion of probable cost.

2ND & GAY - METRO DEPARTMENTAL HEADQUARTERS

Danielle Kohnen NCIDQ, LEED AP



Senior Project Manager

16 Years' Industry Experience

Arizona State University – May 2019
Master of Construction Management

Arizona State University – May 2009
Bachelor of Science Interior Design

Danielle joined True North Advisory in 2024. Through her years of experience, she has a proven track record of overseeing higher education, commercial, aeronautical, and industrial projects from design through construction. She has successfully delivered results through budget constraints, supply chain disruptions, labor shortages and challenging municipal, state and federal environments. Her focus on client satisfaction ensures success for all stakeholders.

SELECT PROJECT EXPERIENCE

Arizona State University Office of the University Architect: Interior Design Manager – 2012 through 2020

Owner's representative responsible for managing more than 30 projects simultaneously by coordinating University department representatives, University facilities, architects and contractors to successfully complete tenant improvements and new construction on ASU campuses through planning, design and construction. Key leader in strategic planning with the University Panners Office. Participated in RFP and RFQ selection committees for architects, contractors and vendors. Created and implemented specification standards for building interiors and furniture.

Arizona State University Mix Center

$93M new facility for the Herberger Institute of Design and the Arts focusing on technology, media, film and experience design. Team member through design coordinating department needs and building standards.

Arizona State University California Center

$40M historic renovation of an 85,770 building in Downtown Los Angeles. Developed interior standards of the building. Coordinated the requirements of multiple stakeholders to successfully incorporate into the final design with the architect of record during design and construction.

Arizona State University Armstrong & Ross Blakley Hall

$25M renovation of two adjacent buildings for The College of Liberal Arts & Sciences and the Department of English. Participated in facilitating a change management strategy team to assist in the move and communication with employees. Developed an interior standard for both buildings.Design Manager for the project through design and construction.

Danielle Kohnen – NCIDQ, LEED AP
Senior Project Manager, 16 Years' Industry Experience
Arizona State University – May 2019
Master of Construction Management
Arizona State University – May 2009
Bachelor of Science Interior Design

Danielle joined True North Advisory in 2024. Through her years of experience, she has a proven track record of overseeing higher education, commercial, aeronautical, and industrial projects from design through construction. She has successfully delivered results through budget constraints, supply chain disruptions, labor shortages and challenging municipal, state and federal environments. Her focus on client satisfaction ensures success for all stakeholders.

Arizona State University (ASU) Office of the University Architect:

Interior Design Manager 2012-2020

Owner's representative responsible for managing more than 30 projects simultaneously by coordinating University department representatives, University facilities, architects and contractors to successfully complete tenant improvements and new construction on ASU campuses through planning, design and construction. Key leader in strategic planning with the University Panners Office. Participated in RFP and RFQ selection committees for architects, contractors and vendors. Created and implemented specification standards for building interiors and furniture.

ASU MIX CENTER
$93M new facility for the Herberger Institute of Design and the Arts focusing on technology, media, film and experience design. Team member through design coordinating department needs and building standards.

ASU CALIFORNIA CENTER
$40M historic renovation of an 85,770 building in Downtown Los Angeles. Developed interior standards of the building. Coordinated the requirements of multiple stakeholders to successfully incorporate into the final design with the architect of record during design and construction.

ASU ARMSTRONG & ROSS BLAKLEY HALL
$25M renovation of two adjacent buildings for The College of Liberal Arts & Sciences and the Department of English. Participated in facilitating a change management strategy team to assist in the move and communication with employees. Developed an interior standard for both buildings. Design Manager for the project through design and construction.

Emily Mayes



Senior Project Manager

18 Years' Industry Experience

Western Kentucky University - May 2003
Bachelor of Science, Interior Design

Emily joined True North Advisory with over 18 years' experience in the design, construction and project management industry. She brings deep expertise in planning and programming, interior design, FF&E, cost and budget analysis and project and relationship management across commercial office, industrial and hospitality sectors. She earned a B.S. in Interior Design from Western Kentucky University.

SELECT PROJECT EXPERIENCE

Western Kentucky University - Planning, Design & Construction: Renovation Project Manager – 2004 through 2007

Administered and managed all phases of design and renovation projects, including space planning, floor plan development, FF&E specification, cost estimating and budget oversight, and contracting with and managing contractors and vendors in compliance with WKU's procurement requirements.

matter REAL ESTATE

MATTER REAL ESTATE MATERIALS

Presented to:

MUSIC CITY ACADEMY AND THE GATE SCHOOL

JANUARY 2026





SECTION I:
COMPANY BIO

Matter Real Estate is a privately held real estate advisory and owner representation firm based in New York. Established in 2017, the firm has operated under the same name for over eight years and currently employs a team of eight. Matter specializes in guiding organizations through complex real estate projects by conducting rigorous analyses of available options and overseeing all aspects of design and construction with precision.

With a proven track record of success, long-standing relationships with top-tier professional partners, and the ability to deliver projects on time and within budget, Matter has earned a reputation for reliability and excellence. The firm's primary office—where work for Music City Academy and The Gate School will be performed—is located at Tower 49, 12 East 49th Street, Floor 15, New York, NY 10017.

Our firm has significant experience and an excellent reputation managing projects with a similar size and scope to the projects Music City Academy and The Gate School are pursuing. Working on this project will be Alex Weis, Chris D'Amato, Samir Kothari, Ryan Daniusis, Anthony Mallozzi, and Anthony Del Greco.

Thank you for the opportunity to present our qualifications and services for this project.

SECTION I: PRIOR EXPERIENCE

From renovations to relocation, we provide tailored solutions that align with each institution's mission, timeline, and budget.

NURSE'S MIDDLE COLLEGE

Location: Nashville, Tennessee
Date Involved: 2025-Present

Contact: Pam McCue:
Contract Type: Owner's Representative
Temporary Facility:

- 20,000 sq. ft. Fit-Out
- Project Budget: ~$1.0M

Permanent Facility:

- 40,000–60,000 sq. ft. Site Search
- Project Budget: $15M–$18M



Scope:
Temporary Facility Delivery: Matter served as Owner's Representative for the fast-tracked delivery of Nurses Middle College's temporary Nashville campus—coordinating consultants and vendors, managing budget and schedule, overseeing GC/IT/FF&E/signage, and securing Temporary and Final Use & Occupancy approvals to open on time and within budget for the academic year.

Permanent Facility Strategy & Site Search:
Matter is supporting the transition to a permanent Nashville campus by leading a structured site search and feasibility process—advising leadership and the board, coordinating brokers and design/build partners, managing RFPs and analyses, and establishing a roadmap for acquisition and construction.

AMBER CHARTER SCHOOL

Location: Inwood, Manhattan
Date Involved: 2020 – 2023

Contact: Kirsys Gomez
Contract Type: Owner's Representative
Project Size: 65,000 sq. ft. | **Project Budget:** $15 M



Scope: Matter served as the Owner's Representative for a renovation project, acting on behalf of the owner to guide the work through each phase with a focus on quality control, timely execution, and cost efficiency. Matter facilitated negotiations with the developer, monitored project milestones, and maintained transparent reporting throughout. The team oversaw a competitive procurement process to identify and engage key vendors and manage coordination across specialties. Matter also supported document review, performed financial oversight including budget management and cost analysis, and delivered succinct, decision-ready reports for the school's leadership.

SECTION I: PRIOR EXPERIENCE

From renovations to relocation, we provide tailored solutions that align with each institution's mission, timeline, and budget.

EQUALITY CHARTER SCHOOL

Location: Bronx. New York
Date Involved: 2020 – Present

Contact: Caitlin Franco
Contract Type: Owner's Representative
Project Size: 64,000 sq. ft. | **Project Budget:** $24 M

Scope: Matter acted as the Owner's Representative for a gut renovation, serving as the owner's primary advocate by overseeing construction to ensure adherence to quality, schedule, and budget. Matter negotiated key terms and changes with the developer, tracked progress through structured reporting, and led the competitive bidding process for vendor selection. The team managed and coordinated critical vendors including low-voltage/IT (LVIT), kitchen equipment suppliers, interior designers, and FF&E procurement. Matter also reviewed legal documents, conducted financial analysis including budget tracking and value engineering, and prepared clear, strategic board reports outlining project updates, financials, and critical decisions.

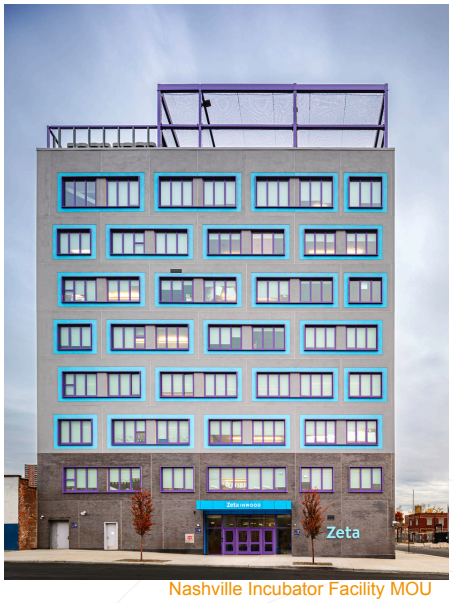


ZETA CHARTER SCHOOL

Location: Inwood, Manhattan
Date Involved: 2023 – 2024

Contact: Christopher D'Amato
Contract Type: Owner's Representative
Project Size: 123,611 sq. ft. | **Project Budget:** $47 M

Scope: Matter was brought on as the Owner's Representative in the final months of construction to help deliver a school project that was at risk of delay. Stepping in at a critical moment, Matter quickly established control over project tracking, resolved outstanding issues with the developer, and streamlined coordination across all teams to regain lost momentum. The team expedited vendor oversight—including low-voltage/IT (LVIT), kitchen equipment, interiors, and FF&E—to ensure timely installation and integration. Matter also provided targeted financial guidance, reviewed key documentation, and kept the board closely informed through clear, action-oriented reporting. As a result, the school was delivered on time despite initial expectations.



SECTION II: TEAM BIOS

Our relevant experience and technical qualifications is demonstrated in the resumes of the proposed staff.

Matters' team of specialists stand out from the competition with an individualistic and customizable service, listening and understanding the needs of our clients.



ALEX WEIS

CEO

Alex founded Matter Real Estate in 2017 to develop a new model of collaboration between like-minded architects, engineers, builders, and others. Alex Weis has 20 years of real estate experience and currently serves as Principal of Matter Real Estate. Alex provides strategic advice and leadership to our New York City based clients by successfully planning, overseeing, and executing complex real estate projects. From 2017, Alex has successfully provided real estate advisory and owner's representative services to a multitude of clients based in New York, New Jersey, Connecticut and Tennessee. Notable clients include Goodwill, Nurse's Middle College, Zeta Schools, the Jackson Museum School, Academy of the City Charter School and Seton Education Partners. Alex received his Master of Science in Real Estate Development degree from the School of Architecture at Columbia University.



ANTHONY DELGRECO

Project Manager

Samir Kothari joined Matter in July of 2023. He provides project management, real estate advisory, and owner representation services to our clients. Samir also contributes to the firm's strategic goals and business development initiatives. His track record includes effectively communicating with clients and creating comprehensive reports that assist them in optimizing their real estate portfolios, identifying new property opportunities, facilitating lease negotiations, and managing construction projects. Samir provides extensive support to a diverse clientele, including Amber Charter School, Zeta Charter School, the Connecticut Charter School Association, Cambria Center for the Gifted Child, Goodwill NY/NJ, Seafarers International House, and Manhattan Bible Church. Samir completed his Bachelors in International Business and Finance from Bryant University and a Master's in Real Estate Development from New York University.



RYAN DANIUSIS

Project Manager

Ryan provides project management, development, advisory, and owner rep services for educational, residential, and commercial projects in the New York metro area. Ryan's scope of work spans the full development lifecycle, from site selection and feasibility analysis to construction management and project close-out. Ryan is responsible for coordination, budget management, and financial analysis, ensuring successful execution and client satisfaction. Prior to joining Matter, Ryan worked as a Development Analyst at Spandrel Development Partners, managing all aspects of residential and hospitality ground up developments throughout the Southeast. Before that, he worked as an Architectural Designer at Arquitectonica Miami, where he project-managed several high-profile luxury developments with a combined projected sales value of over $1 billion. Ryan holds a Master's degree in Real Estate Finance from New York University and a Bachelor of Architecture from the University of Miami.

SECTION II: TEAM BIOS

Our relevant experience and technical qualifications is demonstrated in the resumes of the proposed staff.

Matters' team of specialists stand out from the competition with an individualistic and customizable service, listening and understanding the needs of our clients.



CHRIS D'AMATO

Chief Operating Officer

Chris D'Amato is the Chief Operating Officer of Matter Real Estate, where he leads the company's operations and ensures the team has the systems and tools needed to deliver for clients. He is responsible for making sure the team works effectively, with urgency, and delivers high quality projects. His work provides clients faster responses, cost savings, and excellent buildings. Chris has more than 15 years of leadership experience building practical systems for staffing, budgeting, and day-to-day operations. At Zeta Schools, he directed the expansion of 450,000 square feet of new space and developed the operational frameworks that supported more than 4,000 students. He began his career as a special education teacher, an experience that shaped his problem-solving approach to leadership.



ANTHONY MALLOZZI

Project Associate

Anthony Mallozzi joined Matter Real Estate in September 2024 as a Project Associate. Anthony responsibilities include overseeing development workflows and offering strategic real estate guidance to clients. He contributes to design and construction oversight, facilitates communication between clients and project teams, manages budgets and project timelines, and regularly participates in site visits and walkthroughs to help ensure successful project delivery. His background includes design, market research, and project management. Notable projects include Voice Charter School, Nurses Middle College, and the Cambria Center for the Gifted Child. Anthony holds a degree in Residential Environments & Design with a minor in Real Estate Finance from Virginia Tech, providing him with a strong foundation in both design principles and the financial dynamics of real estate.

SECTION III:
ORGANIZATIONAL STRUCTURE

Matter Real Estate will assign a dedicated team of experienced professionals to oversee all phases of the Music City Academy and Gate School projects, from preconstruction through completion. Our team structure is designed to ensure clear lines of communication, responsive decision-making, and seamless coordination across all boards. The core project team will include the following (4) team members:

ALEX WEIS
Founder & CEO

Provides executive-level leadership and strategic oversight throughout all project phases. Serves as the primary point of contact for the boards and leadership during critical decision-making moments. Oversees high-level risk mitigation, contract strategy, and stakeholder alignment.

SAMIR KOTHARI
PROJECT MANAGER

Leads overall project execution and serves as day-to-day advisor. Manages all consultants, design teams, and contractors. Tracks critical milestones, ensures accountability across teams, and drives communication with city agencies, and vendors.

RYAN DANUSIS
PROJECT MANAGER

Leads overall project execution and serves as day-to-day advisor. Manages all consultants, design teams, and contractors. Tracks critical milestones, ensures accountability across teams, and drives communication with city agencies, and vendors.

ANTHONY MALLOZZI
PROJECT ASSOCIATE

Supports documentation, coordination, and reporting. Prepares agendas, logs meeting notes and action items, tracks submittals and change orders, and manages document control. Ensures project data remains organized and accessible throughout all phases.



SECTION III: PROJECT STRUCTURE

Matter Real Estate ("Matter") proposes to serve as Owner's Representative and advisor to Music City Academy and The Gate School. Our services will encompass strategic planning, site search and selection, permitting, design and construction oversight, and project close-out—ensuring alignment with the school's enrollment growth, schedule, and budget goals.

SITE SEARCH & NEGOTIATION SUPPORT

TASK 1: REVIEW PREVIOUSLY COMPLETED BACKGROUND AND UNDERSTAND NEEDS

- Weekly calls or in-person meetings with clients to discuss open issues and to obtain feedback.
- Analyze key metrics to gain a deeper project understanding of:
  - Current school facility needs and projected space needs
  - Existing and projected student enrollment and staff count
  - Music City Academy and The Gate School's operational budgets and capital that is available for the new project
  - Location analysis to understand proximity preferences of students and staff
- Identify and develop an understanding of the expansion scenarios being contemplated, including analyzing each expansion scenario with respect to:
  - Financial Impact – create a financial model to evaluate the financial feasibility of each option
  - Space – complete an assessment of how space requirements are met
  - Timeline – create a high level timeline to evaluate readiness
  - Location – understand how location impacts students and staff
  - Complexity – understand any complexity that should be accounted for
  - State Approvals - understand how each site will conform with SED requirements
- Meet with Music City Academy and The Gate School's leadership to identify most feasible and desirable options and develop proposed implementation approach, including key steps, necessary team members and other support, along with timeline projection

TASK 2: BOARD COMMUNICATION, UPDATES, AND FACILITATION OF FINAL DECISION

- Assist and short-list vendors including Architects, General Contractors, IT consultants, FF&E vendors, design professionals, kitchen and food service vendors, as needed.
- Assist school in developing a financing / funding plan
- Guiding clients through our report summarizing: proposed approach, schedule, project cost, and financing strategy for the selected options. For each of the potential options, including real world examples and comparison of pros and cons.
- Provide any other requested support to facilitate a productive discussion with Board of Directors



PROJECT MANAGEMENT SUPPORT

TASK 1: PROJECT MANAGEMENT

- Assist vendors including Architects, General Contractors, IT consultants, and FF&E vendors, as needed
- Facilitate the compliance process with state education department facility rules and regulations, required submissions, and other laws, rules, and regulations that apply to charter schools
- Provide any other requested support to facilitate a productive discussion with Board of Directors

TASK 2: DESIGN OVERSIGHT

- Oversee architect and the rest of the design team to ensure key milestones are met during design
- Participate in weekly meetings / calls with the design team
- Develop agendas and meeting minutes to record decisions and action items
- Coordinate site visits with architects and general contractors
- Work with architects to develop design documents & construction documents
- Manage the quality control and coordination process between architect and general contractors
- Review design development documents with general contractors
- Obtain cost estimates from general contractors during design development and value engineer
- Review CDs to ensure requirements are satisfied before submitting drawings to public agencies

TASK 3: FILING AND PERMITTING

- Provide oversight of the government/town filing and permitting process
- Coordinate with the architect and general contractor to obtain construction permits
- Assist in problem solving filing-related issues and make recommendations to client

TASK 4: BIDDING AND CONTRACTOR SELECTION

- Produce leveling documents, highlight important findings and recommend a preferred contractor
- Assist client in the negotiation of a CM agreement with general contractor
- Participate in weekly meetings / calls with the design team
- Monitor the project schedule and the feasibility of meeting key milestone dates

TASK 5: CONSTRUCTION

- Monitor the project schedule and the feasibility of meeting key milestone dates
- Review strategies and work plans with the general contractor and address challenges, as needed
- Participate in weekly project meetings to coordinate construction and vendors, discuss questions concerning design and monitor progress against the schedule
- Draft meeting minutes to make sure responsible parties are identified and a time frame for completion of the task is included
- Provide frequent and regular on-site presence
- Review project reports and records produced by general contractor
- Review change orders that arise from changes to the project requested by client
- Work with architect and general contractor to develop solutions to obstacles that arise and potentially negatively impact the schedule and quality of space that will be delivered to client
- Monitor and report to client the status of expenditures including hard costs, soft costs, contingencies, allowances and potential exposure
- Manage the change order process by reviewing change orders for validity and cost accuracy, making recommendations to client on how to proceed
- Review payment applications and provide recommendations

TASK 6: PROJECT CLOSE-OUT

- Work with architect and general contractor to create a punch list and monitor its completion
- Verify general contractor provides as-built documents, warranties, and maintenance manuals
- Create a final electronic project binder with documents and necessary records
- Oversee financial close-out, including reception of lien waivers from general contractor
- Produce a final, reconciled project budget for client

TASK 7: PUBLIC AGENCY CLOSE-OUT

- Coordinate all required city and state sign-offs & TCO process
- Completion of special inspections, commissioning, etc.
- TCO sign-offs (inspections, fire department approval, equipment-use-permits, PA permits, etc.)
- Monitor and assist the architect, expeditor and contractor during public agency sign off/close-out phase
- Ensure accurate and complete records of inspections and sign-offs are provided to client


"It is my pleasure to recommend Alex Weis and Matter Real Estate to serve as a real estate consultant to your organization. Over the past four years, I have worked closely with Alex as he managed critical real estate and facility improvement projects as our network rapidly expanded to twenty-three schools."
TARA MARLOVITS
CHIEF OPERATING OFFICER
UNCOMMON SCHOOLS



We enjoy solving complex problems with people who are tenacious, creative and thoughtful.

We are fortunate to work with like-minded architects, engineers, builders, and many others. Together, we plan the look of physical space, and make sure it is functional, safe, and economical. The work is challenging but rewarding since construction has a lasting impact on the built environment.

Matter Real Estate partners with clients to plan, oversee, and execute complex real estate projects successfully. Through our work, we support causes we are passionate about. Real estate projects impact the financial well-being of not-for-profit organizations and property owners. Indeed, we know that financial resources saved during a project can be used to support the client's mission.


"Matter has been with us every step of the way in managing some very complex construction projects for both our elementary school & middle school. They're courteous, smart, and always on-time. I give them my highest recommendation."
STEVE ZIMMERMAN
EXECUTIVE DIRECTOR
ACADEMY OF THE CITY CHARTER SCHOOL

Potential Facility Partner Profiles

Architectural Feasibility & Design



COMPANY OVERVIEW

HMK Architects PLLC is a 10-person architecture firm based in Brentwood, Tennessee, with a long history of planning and designing K-12 educational facilities throughout Middle Tennessee. The firm's work over its 26 year history has included several projects for Metro Nashville Public Schools, establishing a foundation in public school standards, code compliance, and stakeholder-driven planning processes.

In recent years, HMK has expanded its work with charter and mission-driven schools, supporting them through facility evaluation, adaptive reuse, phased growth planning, and fast-track delivery models. Most notably, HMK partnered with the Nashville Charter Incubator to design Invictus Nashville Charter School, a new charter school that opened in August 2025. That project required close coordination with the Incubator, school leadership, contractors, and regulatory agencies to align educational vision, enrollment projections, life safety requirements, and schedule certainty.

HMKA's experience aligns well with the needs of charter schools, particularly in early facility identification, feasibility analysis, zoning and code review, ADA and occupancy compliance, and the translation of instructional models into safe, functional, and adaptable learning environments.


McMurray Middle School - Media Center


Old Center Elementary School

COMPANY OVERVIEW

HMK Architects is a collaborative, design-focused firm with deep experience in educational environments. The firm specializes in helping schools translate instructional vision and enrollment growth into practical facility solutions, often within existing buildings or constrained sites.

COMPANY PROCESS

HMK Architects provides comprehensive architectural services supporting charter schools from early planning through construction, occupancy, and future growth. HMKA's process emphasizes schedule certainty, regulatory compliance, and alignment between educational vision, enrollment projections, and facility realities.

1. Educational Program and Facility Alignment
HMKA works with school leadership to understand instructional models, enrollment projections, and operational needs, translating them into clear space requirements and adjacencies.

2. Facility Identification and Feasibility Analysis
HMKA supports evaluation of potential sites and buildings through:

- Site visits and test fits
- Zoning and allowable use verification
- Life safety, occupancy, and egress analysis
- ADA accessibility review
- Identification of major constraints and renovation scope

3. Design and Documentation
HMKA develops architectural designs and construction documents with attention to:

- Classroom layouts aligned with instructional models
- Safe, efficient circulation and supervision
- Functional separation of public, student, and service areas
- Flexibility for future enrollment growth

4. Regulatory Coordination and Approvals
HMKA coordinates with authorities having jurisdiction to support permitting, plan review, and inspections, ensuring compliance with applicable codes and standards.

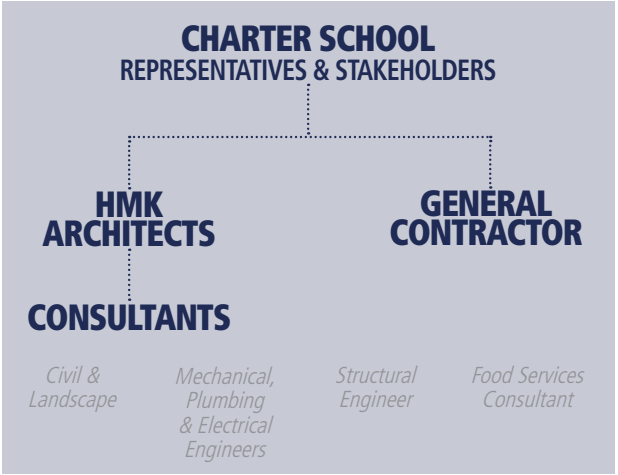
5. Construction Administration
As architect of record, HMKA:

- Responds to contractor questions and clarifies design intent
- Reviews submittals and shop drawings
- Conducts site visits to observe progress and quality
- Supports inspections and certificate of occupancy requirements

6. Occupancy and Future Planning
HMKA remains involved through occupancy and, when appropriate, assists schools with phased expansion or long-term facility planning.



Old Center Elementary School



PROJECT TEAM

For this project, HMKA has curated a focused team that will work directly with school leadership to guide the project from early planning through occupancy, ensuring continuity, responsiveness, and accountability throughout the process.

The following team members will serve as the primary points of contact for the project:

Logan Newton - Principal in Charge

Beth Kickirillo - Senior Project Architect

D'Andre Holmes - Project Coordinator

Olivia Campbell - Project Designer

your hmka team



PRINCIPAL IN CHARGE

LOGAN
NEWTON
NCARB
AIA
TN license #105986

education: Bachelor of Architecture, University of Tennessee, Knoxville, 2012
experience: 13 years at HMKA | 13 years of experience

Logan provides overall leadership and ensures alignment between the school's vision, project goals, and HMKA's services. His deep experience with school facilities and site evaluation provide value to the school throughout the project. He previously served on the Metro Nashville Board of Zoning Appeals, where he sharpened his understanding of zoning and regulatory constraints.



PROJECT DESIGNER

OLIVIA
CAMPBELL

education: B.S., Interior Architecture University of Tennessee, Knoxville, 2022
experience: 3.5 years at HMKA | 3.5 years of experience

Olivia has previous experience with K-12 design as a key member of the Design Team for Old Center Elementary School and Invictus Nashville Charter School. She works directly with the HMKA project team, as well as other team members. Olivia is responsible for material selection and interior design. She enjoys crafting learning spaces for success of educators and students alike.



PROJECT COORDINATOR

D'ANDRE
HOLMES

education: Bachelor of Architecture, Auburn University, 2019
experience: 1 year at HMKA | 6 years of experience

D'Andre supports day-to-day project coordination, communication, and document management throughout all phases of the work. His design acumen, strong work ethic and persistence ultimately lead to project success. D'Andre played a key role in the success of Invictus Nashville Charter School.



SENIOR PROJECT ARCHITECT

BETH
KICKIRILLO
NCARB
AIA
TN license #101059

education: Bachelor of Architecture, University of Tennessee, Knoxville, 1993
experience: 26 years at HMKA | 32 years of experience

Beth leads project design with her extensive experience in educational design and technical execution. She is provides invaluable support to not only her internal team, but also the school's representatives who may not be familiar with the design and construction process. Her keen eye for detail and quest for excellence has contributed to the success of projects over her career including decades of experience with K-12 schools.

RECENT
EDUCATIONAL EXPERIENCE

K-12 experience:

Invictus Nashville Charter School
Owner: Invictus Nashville I Completion: August 2025

The Rock Academy
Owner :The Rock Academy I Scheduled Completion: July 2026

Old Center Elementary School - Renovations and Additions
Owner: Metro Nashville Public Schools
Completion: August 2024

McMurray Middle School Modernization and Additions
Owner: Metro Nashville Public Schools | Completion: May 2019

Antioch Middle School Modernization and Additions
Owner: Metro Nashville Public Schools | Completion: August 2015

Nurses Middle College Nashville
Project Consulting, 2025



McMurray Middle School - Media Center

NASHVILLE INCUBATOR

+

MZA

COMPANY OVERVIEW & PROJECT EXPERIENCE

MZA Architecture & Interiors is an employee-owned, SBE-certified architecture and interior design firm founded in Nashville in 1981. For more than 40 years, MZA has partnered with public, private, and nonprofit clients to plan and deliver facilities that positively impact and engage the community. Our firm resume is populated with a variety of unique designs for award winning schools, multi-family residential buildings, restaurants, hotels, offices, not-for profits, community projects and innovative new concepts in health care, memory care and research. Our business is a collaboration focused workplace where each person contributes to company leadership.

We are committed to environmental and community stewardship, recognizing both the significant role that the built environment plays in climate change and the vast opportunities available to build better. We have experience designing LEED Certified and Living Building Challenge Buildings and have developed sustainable design strategies that are both accessible and aspirational for projects of every scale and budget.

Over the lifetime of our practice, MZA has received numerous design awards from the Urban Land Institute, Metropolitan Historical Commission, the American Institute of Architects, and others. Our reputation is built on our commitment to a collaborative team approach, responsiveness to client needs, and technical know-how to produce inspired designs that consider constructability and cost-effectiveness.

MZA's school portfolio includes:

- Aventura Community School
- Three Rocketship Elementary Schools
- Valor Flagship
- Valor Voyager
- Valor Collegiate Prep High School *(AIA Middle Tennessee Design Award)*
- Nashville Classical Brookmeade
- RePublic High School *(AIA Middle Tennessee Design Award)*
- KIPP Antioch College Prep Elementary *(AIA Tennessee Design Award, Middle Tennessee Design Award)*
- KIPP Antioch College Prep Middle School *(AIA Middle Tennessee Design Award)*
- KIPP Antioch Global High School *(AIA Tennessee Design Award)*
- University School of Nashville
- Templeton Academy
- Intrepid College Prep Schools

MZA brings deep expertise in educational facility planning that aligns instructional models with enrollment growth, operational needs, and long-term flexibility. Our work regularly addresses classroom planning, shared learning spaces, cafeterias, gymnasiums, secure entries, site circulation, and outdoor learning environments while balancing zoning, life safety, ADA compliance, traffic flow, and student safety requirements. We have extensive experience supporting schools through early feasibility studies, site evaluation, code analysis, and entitlement processes to ensure facilities are viable, compliant, and ready to grow with their communities.

Based in Nashville, our team maintains strong working relationships with the Tennessee State Fire Marshal's Office, Metro Planning, Metro Codes, NDOT, and other local authorities having jurisdiction, allowing us to efficiently navigate zoning, occupancy, and permitting requirements. This local knowledge is especially valuable for charter schools pursuing facilities in existing neighborhoods, adaptive reuse buildings, or constrained urban sites. With a collaborative, phased approach and a clear understanding of how educational environments function day-to-day, MZA is well suited to support charter schools seeking flexible, durable, and community-responsive facilities that can evolve as enrollment and programming expand.

COMPANY PROCESS

MZA is committed to a collaborative design process—both internally as a studio and externally with clients, consultants, and stakeholders. We believe the strongest projects emerge when design, technical awareness, and operational realities are considered together from the outset. Our process is structured but flexible, allowing us to respond thoughtfully to the unique goals, constraints, and opportunities of each project.

Rather than relying on a rigid, top-down hierarchy, MZA operates with an integrated team structure that encourages open communication across disciplines. Architects, interior designers, and technical staff work closely together throughout planning, design, and documentation, allowing ideas to be tested early and refined efficiently. This approach supports faster decision-making, clearer coordination, and a shared understanding of project priorities — particularly important for complex projects with real-world schedule, budget, and regulatory considerations.

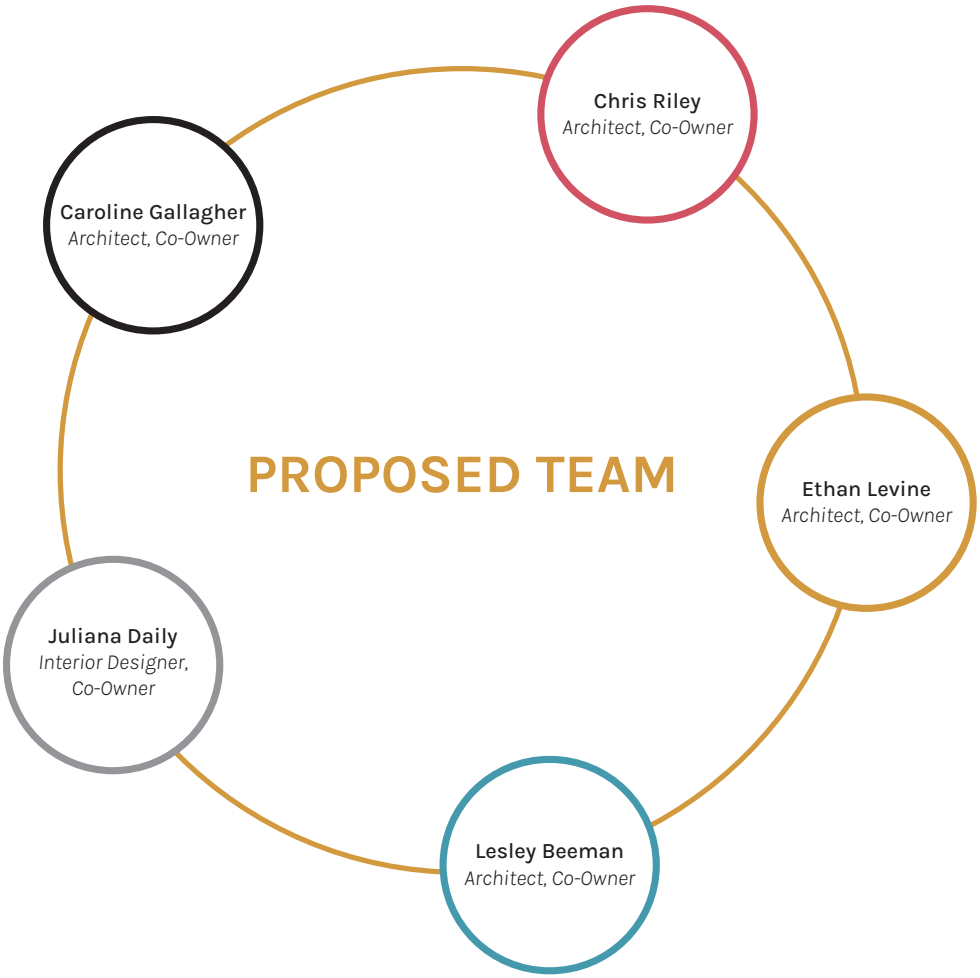
Our work typically begins with early planning and discovery, including space needs assessment, program validation, site and building analysis, and coordination with regulatory requirements such as zoning, occupancy, life safety, and accessibility. From there, we advance projects through concept design, schematic design, and design development with an emphasis on clarity, constructability, and long-term flexibility. Throughout documentation and construction administration, we maintain close collaboration with consultants, contractors, and authorities having jurisdiction to support smooth approvals and informed decision-making.

This collaborative, integrated process has been successfully applied across MZA's charter school and K–12 projects, where alignment between educational goals, operational needs, and the built environment is critical. By combining thoughtful planning, clear communication, and disciplined execution, MZA delivers facilities that are functional, adaptable, and supportive of the communities they serve.

ORGANIZATIONAL STRUCTURE

In 2019, MZA embraced our collaborative culture and became employee-owned. MZA staff consists of nine licensed architects, one architectural designer, one NCIDQ registered interior designer, one director of operations, and one marketing and business development lead.

MZA is managed by an executive committee of four rotating members who are elected annually by the employee-owners of the company. The current executive committee consists of Managing Partner and Architect Mark Bixler, Office Manager Matthew Mckeever, Architect Brad Province, and Architect Caroline Gallagher. Past executive committee members include Chris Riley, Ethan Levine, Lesley Beeman and Juliana Daily. All employee owners will serve on our executive committee at least once, guaranteeing frequent female representation in company leadership.





ORGANIZATIONAL STRUCTURE

MZA expects all staff to lead projects and teams, at levels appropriate to their experience.

We do not rely on "drafters" to complete our projects. Rather, our members are directly involved in both the management of the project and with the production of design and construction documents. Each of our members has experience as a project manager, leading the MZA design team, serving as the main contact and representative to our clients, and will provide oversight and quality control throughout each phase of the project. They are be responsible for communicating design directives from the client to the MZA team and overseeing the design process, construction documents, and construction phase services. During the construction phase, the project manager will attend necessary site meetings, respond to RFIs, review submittals, etc.

The following staff members will be available to act as project managers for the Music City Academy and Gate School project.

Chris Riley, Architect, Co-owner
Chris has vast experience with K-12 schools, and has worked closely from design through construction with schools including Rocketship Public Schools, Aventura, and KIPP.

Ethan Levine, Architect, Co-owner
Over 13 years, Ethan has led many school projects and earned MZA a number of awards for design (Valor and with KIPP schools). He is a versatile architect, capable of moving between programs and working at different scales with ease.

Lesley Beeman, Architect, Co-owner
With more than 30 years of experience in architecture and construction (18 of those at MZA), Lesley has led some of our most innovative projects including Dube Orthopedics. He led MZA's design team on the Springs Empower Academy project, and assisted with design for the KIPP Antioch Global High School project.

Juliana Daily, Interior Designer, Co-owner
With an artist's eye for color and texture, Juliana leads our interior design team. Her work can be seen at KIPP Antioch Global High School, Templeton Academy, and a diverse portfolio of commercial, hospitality, and residential projects.

Caroline Gallagher, Architect, Co-owner
With a focus on interior design, Caroline contributes to MZA's education projects through space planning, interior detailing, and coordination across K–12 and charter school facilities.

KIPP ANTIOCH GLOBAL HIGH SCHOOL

917 Bell Road, Antioch, TN 37013

KIPP Antioch Global High School is part of a master-planned campus designed by MZA to transform a long-vacant, two-story, 200,000 SF department store into a vibrant educational environment. This adaptive reuse project reimagined the existing structure to serve more than 1,200 middle and high school students, with a focus on natural light, safety, and flexible learning environments.

The design team faced the challenge of large, deep floor plates with little access to daylight, as well as portions of the building located below grade. To overcome this, existing escalator openings were transformed into north and south atria, each capped with skylights that draw daylight into the core of the building. These atria became circulation hubs, with classrooms, offices, and labs arranged around them to ensure every learning space has access to natural light. The south atrium anchors the school's public functions - gymnasium, cafeteria/tornado shelter, and future auditorium - while the north atrium supports science labs, art studios, and collaborative learning zones.

The program also includes a secure staff parking garage, multipurpose commons, and athletic amenities, all integrated into the adaptive reuse footprint. A new entry courtyard announces the public face of the school, while site improvements added a regulation soccer field, landscaped circulation zones, and safer arrival points for cars and buses.

Throughout the project, cost-effective interventions were prioritized to stay within the fixed budget, while still delivering a safe, durable, and welcoming school environment. Interior glazing, layered circulation patterns, and flexible layouts create transparency and adaptability, supporting both academic and community use. The result is a joyful, light-filled campus that provides students with a secure, inspiring environment to learn, connect, and prepare for the future.

2025 AIA Tennessee Merit Award









KIPP ANTIOCH COLLEGE PREP MIDDLE SCHOOL

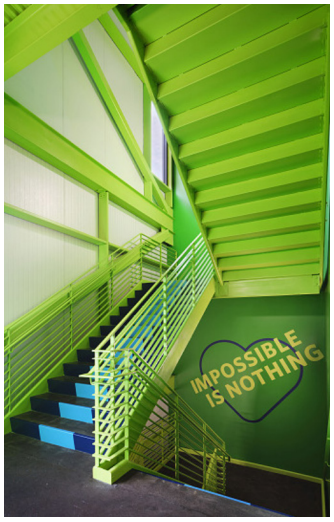
3655 Murfreesboro Pike, Antioch, TN 37013

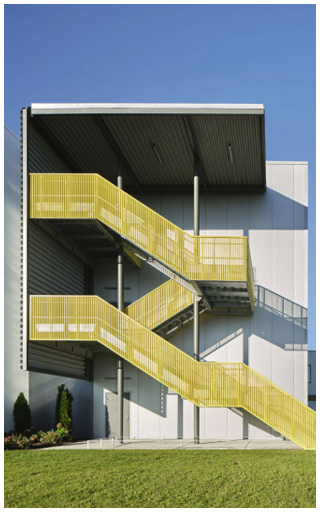
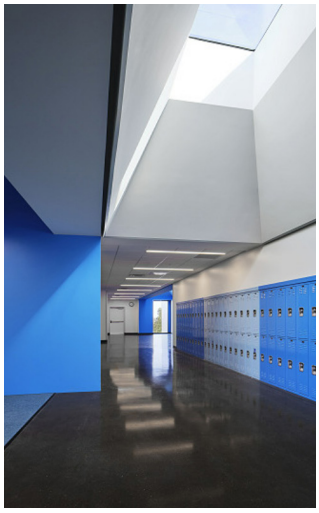
KIPP Antioch College Prep Middle School is the second school to be built on a site master-planned by MZA with Barge Civil Associates. With more than 48,000 SF over three stories, the building provides an engaging educational environment with light filled gathering spaces for approximately 500 fifth through eighth graders.

Early in the master planning process for the campus, the design team identified a theme that would guide the dialogue between the two facilities for which the campus was planned: KIPP Antioch Elementary “The Barn” explores forms familiar to agricultural buildings. This project, KIPP Antioch Middle “The Boat” focuses on the uplifting sensation that, like a seafaring vessel, an exceptional education can provide.

Bold and decisive pops of color act in counterpoint to the understated, monochromatic building skin. South and West facing building elements are choreographed to accentuate the play of light throughout the day. Informal gathering spaces interconnect and provide access to daylight in unexpected ways. The light filled café is also a multiuse space that doubles as pre-function and lobby for the gymnasium.

2021 AIA Middle Tennessee Design Award


KIPP ANTIOCH COLLEGE PREP ELEMENTARY SCHOOL

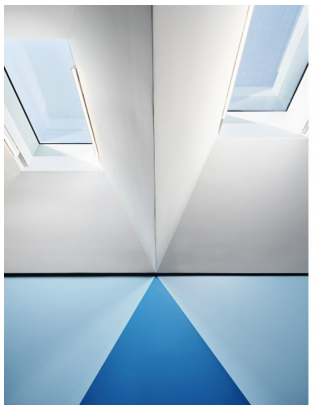
3655 Murfreesboro Pike, Antioch, TN 37013

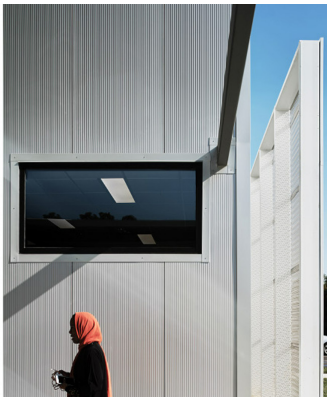
As we became more familiar with the program and KIPP's educational approach, one primary theme really resonated with us: thoughts around the clustering of classrooms, enrichment rooms, counseling rooms, and admin spaces lead to this idea of "neighborhoods." We imagined the enrichment classrooms as the town square. They became an organizational feature that informed a kind of order among interior spaces and exterior building elements.

While the relationship between individual building functions created hierarchy, responses to the site itself informed larger scale architectural decisions. Zoning required the building to be located along Murfreesboro Pike. As a result, classrooms have views to the North and South creating optimal conditions for maximizing access to natural light. We introduced a series of architectural sunshades to mitigate overexposure on the South and West sides of the building. These site responses yielded the distinctive and varied look and feel of the building.

Though the design's response to program and site conditions is essential, we kept the children front of mind. How could a facility of this scale create a sense of welcome and exude youthful optimism? We addressed this question in several ways. North and South entrances became the "front and back porch." Canopies with deep overhangs compress space to the scale of the students and provide protection from the elements. Interior spaces are brightened with skylights and pops of color. Common areas are flanked by large windows with views of the outdoors.

2020 AIA Middle Tennessee Design Award
2022 AIA Tennessee Design Award


VALOR COLLEGE PREP HIGH SCHOOL

2531 Nolensville Pike, Nashville, TN 37211

In 2014, MZA began working with Valor Collegiate Academies, a non-profit charter school, on the phased design and construction of two middle schools (Flagship Middle & Voyager Middle) and a high school (Valor College Prep High School) on the school's South Nashville campus.

Valor purchased a former Lowe's Home Improvement building, a more than 100,000 SF space situated on a parcel adjacent to their previous Valor Flagship. The client's goal was to turn the unused former retail space into two distinct schools: Voyager Middle (completed in 2017) and Valor College Prep (completed in 2018).

To meet the challenge of converting a former big box store into an educational space for more than 1,200 students, MZA bifurcated the original building shell, creating a 10,000 SF exterior courtyard where interior space once existed. The courtyard provides lush green space, a vital amenity for schools in the urban core. A second floor was added to the existing building envelope, effectively doubling the usable area within the building's footprint.

The courtyard, along with a central atrium, allows sunlight to penetrate the center of the high school, illuminating the educational spaces, chemistry labs, and music rooms near the building center. A new gym was delivered under tight budget and space constraints and includes an elevated running track, basketball, and volleyball courts.

2018 AIA Middle Tennessee Design Award







VALOR COLLEGIATE ACADEMIES

4531 Nolensville Pk, Nashville, TN 37211

Valor Collegiate Academies is home to two middle schools and a high school in South Nashville. The first middle school project was a renovation to a 19,000 SF former office building with a 20,000 SF expansion the following year. The creation of new space for the school was an opportunity to depart from the existing strip mall aesthetic and create a fresh, contemporary building filled with natural light and open flexible educational spaces.

Continuing the expansion of the campus the following year, the school purchased a former Lowe's Home Improvement building adjacent to the middle school to develop a second middle school and a high school.

To create two distinct schools out of the former big box store, MZA proposed a novel design approach which bifurcated the building and created a 10,000 SF courtyard where interior space once existed. Sunlight now penetrates into the center of both the middle and high school buildings, illuminating the innermost areas. In addition, a second floor was inserted into the existing building envelope, effectively doubling the usable area within the existing footprint. The renovated buildings create a bright and airy educational environment organized around open, flexible communal spaces the school uses to reinforce the mentoring and mindfulness work at the core of the Valor educational model.






ROCKETSHIP NORTHEAST ELEMENTARY

2526 Dickerson Pike, Nashville, TN 37207

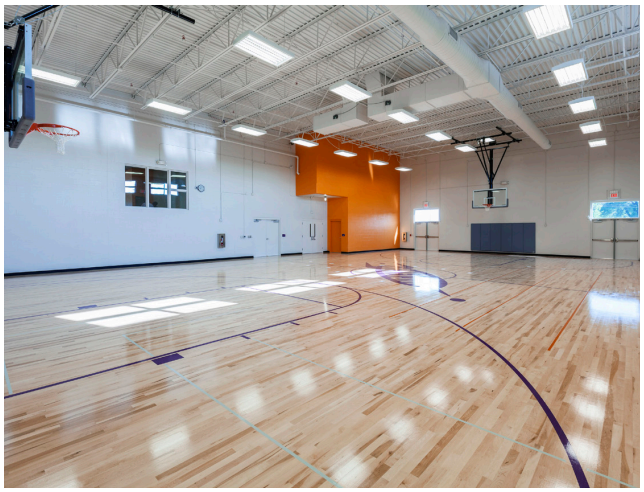
Rocketship Northeast Elementary is the first in a series of Tennessee Rocketship Schools that seek to provide high-quality education to low-income students. Completed in July 2014, this new school serves 450 students ranging from Kindergarten to 4th grade. The 37,000 SF building houses 26 classrooms, a gym, parent/teacher interaction spaces, and a learning lab available to all grade levels.

Natural light plays an important role in the project, and each space has access to exterior windows. The site includes three distinct play areas that can double as gardens and outdoor education spaces.









CHRIS RILEY

Architect, Co-owner
criley@mzarch.com

BIO

After graduating from Mississippi State, Chris worked in Oxford, MS for two years before joinng MZA in 2006. In 2015, Chris and his family relocated and he spent the next three years gaining experience working on various project types in North Carolina.

Chris added that experience to the team when he rejoined MZA in 2018. While with MZA, he's assisted or led on projects ranging from educational projects to carport additions to adaptive reuse to multi-million dollar new construction.

In each project, Chris strives to balance client needs, responsibility to community, and requirements of building code to create thoughtful, functional spaces. Chris brings an eye for detail to the design process and believes strongly in giving each project its own unique sense of place.



EDUCATION

Bachelor of Architecture
Mississippi State College of Architecture, 2004

REGISTRATIONS

Registered Architect: Tennessee, Michigan

National Council of Architectural Registration Boards
American Institute of Architects
Construction Specifications Institute - Construction Documents Technologist

SELECTED PROJECTS

Aventura Community Schools | Nashville, TN
Education, Addaptive reuse
A full renovation of an existing 90,000 SF, two-story office building to accomidate Aventura's K-8 program. The scope of work includes an addition which functions as a community tornado shelter and gym, playground and future soccer pitch areas, and accommodation of future school tenants within the building.

KIPP Antioch College Prep Elementary & Middle School | Antioch, TN
Education
A 50,000 SF, three-story elementary school for 700 students and a 48,600 SF, three-story middle school for 500 students. Both with a cafeteria, warming kitchen, gym, and shared sports field completed in 2019 & 2021 respectively.

KIPP Antioch Global High School | Antioch, TN
Education, Addaptive reuse
A 200,000 SF, two-story adaptive reuse for 1200 students with a cafeteria, kitchen, gym and soccer field completed in 2024 respectively.

Rocketship Dream Community Prep | Nashville, TN
Education
37,000 SF, two-story, new construction K-4th Grade school. The program includes classrooms, offices, cafeteria, and gymnasium. During construction, the school expanded the scope of work to include an artificial turf soccer pitch and upgraded playground.

ETHAN LEVINE

Architect, Co-owner
elevine@mzarch.com

BIO

Ethan and his family moved back to the Southeast from Honolulu, Hawaii where he owned and operated an architecture practice focused on adaptive reuse, hospitality, and high end retail projects. As an international melting pot, Hawaii reinforced Ethan's empathic tendencies and helped inform his interest in social equity and affordability. Ethan strongly believes that architects have a responsibility to use their craft to effect positive and lasting change in their community.

Since joining MZA in 2013, Ethan's work includes sculpture, restaurants, a brewery, K-12 education, office, Alzheimer's care, retail, civic and private residences. Ethan, feels that relationships are at the core of any successful undertaking and the best projects are those fueled by a fun and collaborative spirit. That belief, paired with a commitment to disciplined project delivery methods, enables Ethan to help MZA clients build remarkable architecture.



EDUCATION

Bachelor of Architecture
The University of Tennessee Knoxville College of Architecture, 2003

REGISTRATIONS

Registered Architect: Tennessee, Michigan

American Institute of Architects
US Green Build Council LEED AP
National Council of Architectural Registration Boards

SELECTED PROJECTS

KIPP Antioch College Prep Elementary & Middle School | Antioch, TN
Education
A 50,000 SF, three-story ES for 700 students, a 48,600 SF, 3 story MS for 500 students. Both with a cafeteria, warming kitchen, gym, and shared sports field completed in 2019 & 2021 respectively.

KIPP Antioch Global High School | Antioch, TN
Education, Addaptive reuse
A 200,000 SF, two-story adaptive reuse for 1200 students with a cafeteria, kitchen, gym and soccer field completed in 2024.

Valor Collegiate Academies | Nashville, TN
Education
A multi-year phased design and construction of a school campus with two middle schools and a high school. The combined square footage of the project totaled 209,000.

University School of Nashville Centennial Reno & Addition | Nashville, TN
Education
Renovation and addition to the historic USN campus. The design responded to the client's modern use of this McKim Mead & White building and restored many of its original features, including a 3-lane, 20 yard indoor swimming pool and the 19,000 SF Tibbott Center Theater.

LESLEY BEEMAN

Architect, Co-owner
lbeeman@mzarch.com

BIO

Lesley came to Nashville in 2005 after practicing architecture in Mississippi. He has been a part of the MZA team since arriving in Nashville, and has seen the firm grow from six people working on smaller projects to the vibrant, multidisciplinary place it is today. During that time he has designed a wide variety of building types in a breadth of architectural styles including educational, single-family residential, multi-family, hospitality, medical and office.

Lesley has more gray hair and grand-children now, but he still enjoys working with clients to create new exciting buildings on the landscape.

One of the longest tenured architects at MZA, Lesley takes a leadership role on design projects and in the office by mentoring younger designers. The "Obi Wan" of MZA Lesley regularly leads inner-office workshops to review best practices of construction documents and project management.



EDUCATION

Bachelor of Architecture
Mississippi State College of Architecture, 1995

REGISTRATIONS

Registered Architect: Tennessee

American Institute of Architects

SELECTED PROJECTS

KIPP Antioch Global High School | Antioch, TN
Education, Addaptive reuse
A 200,000 SF, two-story adaptive reuse for 1200 students with a cafeteria, kitchen, gym and soccer field completed in 2024 respectively.

Springs Empower Academy | Smyrna, TN
Education
Phase 1 of 4 for a new charter school building serving approximately 800 students grades K-8. Includes a storm shelter, gymnasium, playground, and outdoor playing fields. Phase 1 serves 480 students grades K-4. Currently in design.

Buena Vista Apartments | Nashville, TN
Affordable Residential
Affordable housing project providing 60 housing units in two single loaded buildings. Amenities include a large community room with kitchenette, tenant vegetable gardens, and a playground.

Dube Orthopedics & Physical Therapy | Nashville, TN
Commercial
New construction of a 30,000 SF medical office with a large cantilevered porte cochere in the front. Unique features included custom fritted glass windows on the ground floor and a glass elevator in the main lobby. The project won a 2024 AIA TN design award.

JULIANA DAILY

Interior Designer, Co-owner
jdaily@mzarch.com

BIO

Prior to moving to Nashville, Juliana worked at a historic preservation architecture firm in Syracuse, NY on projects including Main Street façade programs, religious properties, and housing rehabilitation. A part of the MZA team since 2016, her experience includes work on educational facilities, commercial, hospitality interiors, multi-family and single-family residences, among others. She enjoys the tactile qualities and innately human scale of interior work, as well as working closely with clients to develop the conceptual narrative that drives the design decisions within a space.

Juliana loves exploring the various scales at which thoughtful architectural and visual design can engage communities and individuals with their environments and with one another. She thrives being challenged to learn new things, loves creating and being surrounded by art, and cares deeply about her footprint on this earth.



EDUCATION

M.A. Interior Design
Cornell University Graduate School, 2012

B.S. Interior Design
Cornell University, 2010

REGISTRATIONS

National Council for Interior Design Qualification

SELECTED PROJECTS

Aventura Community Schools | Nashville, TN
Education, Addaptive reuse
A full renovation of an existing 90,000 SF, two-story office building to accomidate Aventura's K-8 program. The scope of work includes an addition which functions as a community tornado shelter and gym, playground and future soccer pitch areas, and accommodation of future school tenants within the building.

KIPP Antioch Global High School |Antioch, TN
Education, Adaptive reuse
A 200,000 SF adaptive reuse building. Led concept development, fixture & finish specification, design development & coordination with project consultants, rendering production and support for construction documents.

Rocketship Dream Community Prep | Nashville, TN
Education
37,000 SF, two-story, new construction K-4th Grade school. The program includes classrooms, offices, cafeteria, and gymnasium. During construction, the school expanded the scope of work to include an artificial turf soccer pitch and upgraded playground.

Templeton Academy | Nashville, TN
Education, Renovation/Reuse
Interior renovation of existing building to accommodate a private, college preparatory high school.

CAROLINE GALLAGHER

Architect, Interior Designer, Co-owner
cgallagher@mzarch.com

BIO

Caroline moved to Nashville in 2017 after graduating from the University of Texas at Austin, and joined MZA in 2020. She is a licensed architect with an established background in interior design. She has experience working in hospitality, retail, commercial, institutional, mixed use multi-family, and residential design for firms in Nashville and New York City. She loves collaborating with local makers and artists on projects and is passionate about contributing positively to the growing, changing urban fabric of Nashville.

Caroline is also a proud dog mom to Mila, who loves to go to work and can usually be found napping under her desk.



EDUCATION

Bachelor of Architecture
The University of Texas at Austin, 2017

REGISTRATIONS

Registered Architect: Tennessee, Michigan

American Institute of Architects
National Council of Architectural Registration Boards

SELECTED PROJECTS

12 South Collection | Nashville, TN
Retail, Food & Beverage
29,000 sf new construction shell building for retail, F&B and structured parking.

Maiz De La Vida | Nashville, TN
Hospitality
Interior fit out of the first brick and mortar location for a popular local food truck.

Voorhees Core and Shell | Nashville, TN
Commercial Shell
Revitalized 63,000 SF building for state of the art office, retail and hospitality as part of a 2.6 Acre master planned urban infill project.

Antique Mall | Nashville, TN
Retail, Food & Beverage Shell
26,570 SF Adaptive Reuse of an existing historic brick building fronting Nashville's 8th Ave South.



The Gate School

Statement of Qualifications
Submitted January 05, 2026
Submission by:
Southern Architecture Workshop, LLC

1129 Martin Street
Nashville, TN 37210

615.830.5600
neil@sawarchitect.com
sawarchitect.com

Nashville Incubator Facility MOU
Page 70 of 146

Southern Architecture Workshop

Office
1229 Martin Street
Nashville, TN 37210

Professional Services
Architecture
Master Planning
Interior Design

Established
2022

No. of employees
8

Firm Profile & Staff

Mission
Southern Architecture Workshop (SAW) is dedicated to creating meaningful spaces for all communities, regardless of means, project type, or location. Our mission is to create beautiful places, foster community, and support the people and places we serve so they can flourish long into the future.

Who we are
We design thoughtful, community-centered projects in close partnership with our clients.

Southern Architecture Workshop is an architecture, planning, and design studio based in Middle Tennessee. Our practice combines attentive service, clear communication, and a steady commitment to design excellence. We collaborate frequently with municipalities, public agencies, and civic organizations, and strive to be a reliable partner from early planning through construction.

At SAW, we do what we say we will. We listen closely and work with respect for our clients' goals, budgets, and time lines. Building on that foundation, our team combines architectural design with rigorous technical expertise and organized project management to realize our clients' vision to create buildings that are successful on day one and that continue to serve their communities well into the future.



Neil Parrish
Principal & Founder



Eric Hawkins
Associate Principal



David Berry
Project Manager



Kaylee Miner
Senior Interior Designer



Melodie Haynes
Office Manager & HR



Cole Robinson
Project Architect



Ryan Tucker
Designer



Michael Jenks
Designer



Project Team & Organization

Project Team

SAW leverages its experience and deep relationships to lead a collaborative team of architects, engineers, and industry specialists with deep experience in education and community projects across Middle Tennessee. Each consultant brings a clear scope of responsibility and a proven ability to support projects that involve unique program requirements, coordination, and technically complex site constraints. Together, our team provides the architectural, structural, civil, MEP, fire protection, and low-voltage expertise required for a modern, innovative charter school.

Organization

When the time is appropriate, SAW will serve as the prime consultant and primary point of contact for the Gate School, leading programming, planning, design development, documentation, stakeholder engagement, and coordination. Our engineering partners bring decades of educational and community experience and will work closely with SAW throughout planning, design, and construction. This organizational structure ensures clear communication, efficient decision-making, and a coordinated approach from early planning through project delivery.

Architecture

Southern Architecture Workshop, LLC

Neil Parrish – Principal in Charge
Eric Hawkins – Associate Principal
David Berry – Project Manager
Kaylee Miner - Senior Interior Designer
Cole Robinson – Project Architect
Michael Jenks – Designer
Ryan Tucker – Designer



Approach and Methodology

Approach

SAW approaches each project with a clear, organized process that emphasizes communication, transparency, and early alignment with our clients. We begin by working closely with charter school founders, staff, and project stakeholders to confirm goals, schedules, site conditions, operational needs, and project priorities. This early coordination helps establish a shared understanding of the project and ensures a steady, well-supported path into design.

Methodology

Throughout the project's design, SAW will maintain consistent communication with The Gate School and our consultant team to ensure coordination of programming, site planning, civil and utility requirements, structural systems, and building systems. SAW's academic experience will serve as an asset when designing diverse, flexible learning environments that can support a range of layouts from traditional classrooms to the Harkness Method. We will work closely with The Gate School to identify unique programmatic considerations to drive performance for teachers and students alike. Our methodology emphasizes early problem-solving, thoughtful documentation, and ongoing cost awareness so that decisions are made with clarity and confidence.

From design through construction, our team maintains a reliable presence, providing timely responses, agile thinking, organized documentation, and steady support. Our goal is to deliver a project that is well-coordinated, fiscally responsible, and aligned with the specific needs of The Gate School.



Project overview

SAW worked with Sewanee: The University of the South to transform a series of interior rooms and racket ball courts into a modern training and athletics complex for varsity sports and the local community. An interior wall of stone quarried on campus provides a historic backdrop to the minimalist lines of the renovated space. On the first floor, new weights, racks and cardio equipment are complimented by an indoor synthetic turf and agility training area where athletes can build stamina or recover from injuries 365 days a year. The second floor is reserved for the entire community and features cardio, weight-training, and resistance equipment situated on a raised mezzanine overlooking the athletics weight room below.

Estimated Completion
2026

Scope
Architecture

Client
Sewanee: The University of The South

Location
Sewanee, TN





EDUCATIONAL

JAMES LAWSON HIGH SCHOOL

Project overview

SAW partnered with Hastings Architecture to assist Metro Nashville Public Schools in the design and construction of it's newest 310,000 sf high school. The school contains a breadth of programs from education spaces, science labs, and office space to culinary and food service, athletics, theatre, performance spaces to health science. Highly sustainable, the project is integrated into a 270 acre wooded landscape and is targeting LEED Gold certification with strategies such as native landscaping, photovoltaics, and greywater capture and reuse. Total Construction Cost: $125,000,000.

Completed
2023

Scope
Architecture

Building Size
310,000 SF

Client
Metro Nashville Public Schools

Location
Nashville, TN

Completed With
Hastings Architecture





Project overview

Southern Architecture Workshop is leading the design of a new 58,000-square-foot civic facility for the City of Dickson, the YMCA, and a team of community partners. Inspired by the natural beauty and material heritage of Middle Tennessee, the building's contemporary design features references to iron, stone, and timber to create a meaningful connection to its landscape. Envisioned as a vibrant hub for wellness, connection, and lifelong learning, the project has been shaped through extensive community engagement and a shared commitment to creating a place the people of Dickson can take pride in. This facility reflects SAW's mission to create enduring, community-centered spaces that honor local materials, stories, and the people they serve.

Estimated Completion
2028

Scope
Architecture

Building Size
55,000 SF

Client
City of Dickson

Location
Dickson, TN





RELIGIOUS

SOUTHALL CHURCH

Project overview

Southall Church in Franklin, Tennessee worked with SAW to re-imagine their campus for the next two decades of their ministry. Beginning with a collaborative master planning process, SAW helped the church plan and phase the improvements to their campus to parallel Southall's priorities of service to the Franklin community and addressing need both locally and abroad. From those initial conversations, emerged an immediate need to create a new front door, as well as new gathering and fellowship spaces to help further support their growing ministry.

Estimated Completion
2027 Anticipated

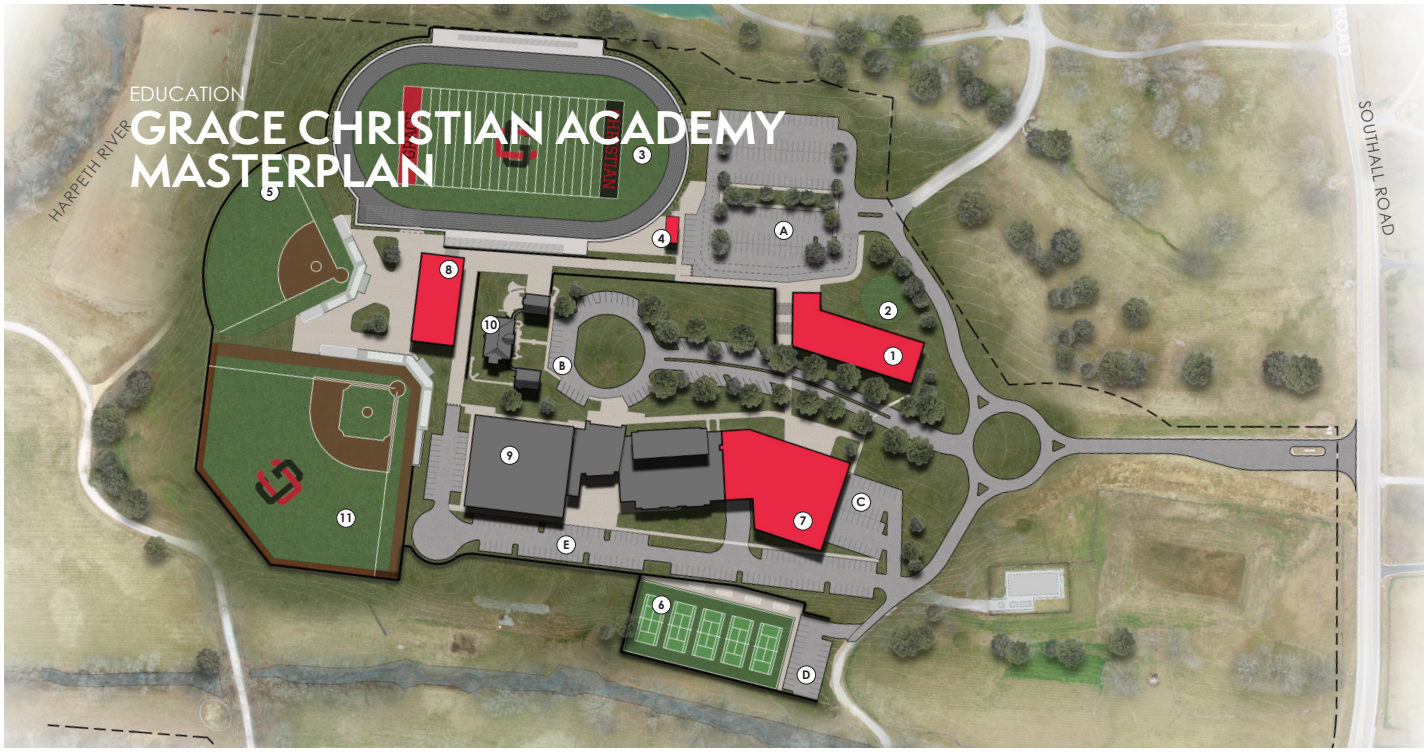
Scope
Architecture

Building Size
9,500 SF

Client
Southall Church

Location
Franklin, TN





Project overview

SAW worked with Grace Christian Academy (GCA) of Franklin, TN to masterplan their Franklin, TN based campus for the next 20 years of growth. Working with a team of local civil and soil engineers, SAW helped GCA navigate the numerous site constraints including the Harpeth River floodplain, steep topography, and limited areas for utilities to create a future vision for the campus that allows for growth in all areas of campus life. The new plan adds a new athletics facility, softball field, fieldhouse, lower school, and fine arts building within the boundaries of the existing campus.

Completion
2026

Scope
Masterplan

Client
Grace Christian Academy

Location
Franklin, TN





Project overview

SAW joined HLDA and a team of regional and local partners to create a monument for Centre College honoring Supreme Court Justice John Marshall Harlan, the "Great Dissenter" whose landmark opinions helped shape the Civil Rights Movement. The plaza's design symbolizes perseverance and progress through a limestone wall that gradually descends and transforms into a path forward. At its center, a sculpture of Harlan by Ed Hamilton stands in dialogue with Abraham Lincoln's nearby statue, linking two voices of conscience across time. Bronze medallions embedded in the stones trace milestones from Harlan's life, creating a place for reflection, gathering, and inspiration for generations to come.

Services: SAW worked with HDLA to design and coordinate the plaza, it's integration to existing campus facilities, and the unique engineering requirements of the statue and angled stone wall. Working with numerous stakeholder groups including students, faculty, administration, donors, and members of the board, SAW and HDLA crafted a design together that simultaneously honored Harlan's incredible legacy and reinvigorated a central part of campus.

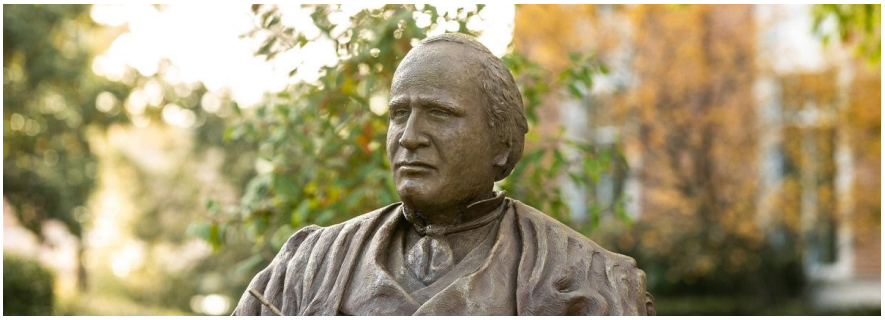
Completion
2025

Scope
Architecture

Building Size
9,500 SF

Client
Centre College

Location
Danville, KY





Neil Parrish | Principal + Founder

AIA | NCARB | LEED AP BD+C

Neil has extensive experience coordinating large teams of designers and consultants in the design and execution of Educational, Residential, Commercial, Office, and Masterplanning projects across the United States. Throughout his career he has been focused on educational and public work, designing and managing projects for public and institutional clients from Seattle, WA, to Nashville, TN and Winter Gardens Florida. Passionate about sustainability, he has helped execute numerous LEED projects including the 310,000 gsf, James Lawson High School in Nashville, TN which is targeting LEED Gold and LEED Platinum Fire Station 20 in Seattle, WA.

Education

Masters of Architecture
University of Tennessee, Knoxville | May 2011

Master of Theological Studies
Vanderbilt University | May 2008

Diploma for Graduates in Religion. University of Otago, N.Z. | Nov 2005

Bachelor of Arts in English & Spanish, Cum Laude. Centre College | May 2003

Architectural License

Tennessee # 107743

Relevant Project Experience

Academic

Fowler Center - Sewanee: The University of the South - Sewanee, TN
Glencliff High School Programming & Existing Facility Assesment - Nashville, TN
Shelby County Public Schools Re-roofs, Memphis, TN:
Keystone Elementary, AB Hill Elementary, Dexter Elementary
Georgian Hills Middle, Treadwell K-8 - Shelby County Public Schools
Metro Nashville Public Schools Re-roofs:
Whitsitt Elementary School, Nashville, TN
Mt. View Elementary School Antioch, TN
James Lawson High School - Nashville, TN*

Cultural + Civic

Dickson YMCA - Dickson, TN
Dickson City Center - Dickson, TN
Tucker Ranch Garden and Public Park - Winter Garden, FL
Fire Station 20 - Seattle, WA*

Community + Religious

Sri Ganesha Temple Expansion - Nashville, TN
Southall Church Renovations - Franklin, TN

Commerical

Pinnacle Regional Office - Murfreesboro, TN*
Hyundai + Genesis of Hickory Hollow - Nashville, TN

Master Planning

YMCA Northwest Masterplan - Nashville, TN
Grace Christian Academy Masterplan - Franklin, TN
Donelson Christian Academy Masterplan - Nashville, TN

*Project experience with previous firm



Eric Hawkins | Associate Principal

AIA | NCARB

Eric Hawkins is a seasoned architect who believes great design begins with listening. For two decades, he has helped schools and communities transform big ideas into spaces that feel welcoming and purposeful. Eric has led design efforts for educational, workplace, and cultural projects across the country—guiding teams from concept through construction and building strong partnerships with clients and stakeholders. His approachable style and commitment to thoughtful design have made him a trusted resource for institutions seeking environments that foster growth and innovation. He is dedicated to helping schools turn aspirations into spaces where students, teachers, and communities flourish.

Education

Bachelor of Architecture
University of Tennessee
Knoxville | 2005

Masters of Architecture
Virginia Tech | 2010

Architectural License

District of Columbia
License #ARC200258

Relevant Project Experience

Academic & Community

Oak Hill School Track and Field - Nashville, TN
McCallie School - Chattanooga, TN
SE Raleigh Promise YMCA and Charter School Feasibility Study - Raleigh, NC
Vandora Springs Elementary School - Garner, NC
The Hawbridge School - Saxapahaw, NC
Westgate Elementary School - Fairfax, VA
White Memorial Presbyterian Church Addition - Raleigh, NC
Woodmont Christian Church Addition - Nashville, TN
Knight Theater - Charlotte, NC

Higher Education

Montague Hall, Wake Tech Community College - Raleigh, NC
Tracey F. Smith Hall of Nursing and Health Sciences, Campbell University
Luby Wood Residence Hall, Campbell University - Buies Creek, NC
Oscar N. Harris Student Union, Campbell University - Buies Creek, NC
Sykes Chapel & Center for Faith and Values, University of Tampa - Tampa, FL
Case Commons, NC State University - Raleigh, NC
Advanced Applied Technology Center, Alamance Community College
The Avenir Foundation Conservation and Collections Resource Center,
George Washington University - Washington, DC
Spelman College Performing Arts Center - Atlanta, GA
Economics Building Feasibility Study – George Mason University, Arlington, VA

Mixed-use & Urban Development

805 Lea - Nashville, TN
Durham City Center - Durham, NC

Workplace

Fairwinds Federal Credit Union - Orlando, FL
Adventist Health HQ Campus - Roseville, CA
421 Harrington Office Building - Raleigh, NC
Warner Music Nashville and Warner Chapell - Nashville, TN

*Project experience with previous firm



Kaylee Miner | Senior Interior Designer

IIDA

Design begins with a blank canvas shaped by client aspirations. Through innovative problem-solving and collaboration, Kaylee delivers bespoke solutions and details that consistently exceed expectations. A highly skilled professional, Kaylee works with clients to bring their visions to life while maintaining budget and schedule—even on complex projects. In addition to her design expertise, she is committed to mentoring emerging designers and providing training in construction detailing, workload management, and overall project execution. Kaylee's passion for learning drives her continuous growth.

Education

Bachelor of Science in
Interior Design
The Art Institute of
California-San Diego | 2007

Professional Certification

NCIDQ
License #385903

Relevant Project Experience

Academic

Quail Valley Child Care Center – Menifee, CA*
21st Century Classroom Technology Improvements – San Diego Unified School District, San Diego, CA*
California Baptist University, Lancer Plaza North – Riverside, CA*
Jeff Jacobs JAM Center Basketball Performance Center – San Diego, CA*

Civic

Sun City Library – Menifee, CA*

Retail

Viejas Outlets – Alpine, CA*

Medical Office

Pacific Doctors Park Renovation – San Diego, CA*

Hospitality - Resort

Caesars NOLA – New Orleans, LA*
Resorts World – Queens, NY*
Hawaiian Gardens – Hawaiian Gardens, CA*
Viejas Hotel & Tower 1 & Expansion – Alpine, CA*
Viejas Hotel & Tower 2 & Expansion – Alpine, CA*
Upper Lake – Upper Lake, CA*
University Club – Los Angeles, CA*
Tesuque Concept Development – Tesuque, NM*
Carlsbad by the Sea Renovation – Carlsbad, CA*
Twin Arrows Hotel & Spa – Flagstaff, AZ*

*Project experience with previous firm



David Berry | Project Manager

AIA | NCARB | LEED AP BD+C

David joined Southern Architecture Workshop in 2024 as a Project Manager, bringing nearly a decade of architectural experience across a wide range of project types in Middle Tennessee. He approaches architecture as a true generalist, engaging deeply in every phase of the design and construction process—from early conceptual development to navigating complex technical challenges in the field. A graduate of the University of Tennessee, David is committed to delivering thoughtful, creative solutions and to shaping architecture that makes a lasting, positive contribution to the built environment.

Education

Bachelor of Architecture.
University of Tennessee.
Knoxville | May 2016

Architectural License
Tennessee # 105783

Relevant Project Experience

Academic

Fowler Center Renovation, Sewanee University - Sewannee, TN
Shelby County Public Schools Re-roofs:
Keystone Elementary, AB Hill Elementary, Dexter Elementary
Georgian Hills Middle, Treadwell K-8
Shelby County Public Schools - Memphis, TN
TSU Health Sciences Building, Tennessee State University - Nashville, TN*
Shenandoah University Health Professions Building - Winchester, VA

Community + Religious

Sri Ganesha Temple Expansion - Nashville, TN
Southall Church Renovations - Franklin, TN
Christ Presbyterian Church Music Row Church Offices - Nashville, TN
Dickson YMCA - Dickson, TN
Dickson City Center - Dickson, TN

Master Planning

YMCA Northwest Masterplan - Nashville, TN
Grace Christian Academy Masterplan - Franklin, TN

Commercial

Hyundai + Genesis of Hickory Hollow - Nashville, TN
Pinnacle Hixson Branch - Hixson, TN
Pinnacle Cleveland Office Renovations - Cleveland, TN

*Project experience with previous firm



Cole Robinson | Project Architect

Cole joined Southern Architecture Workshop in 2025 and immediately bolstered the firm's residential planning depth. Cole started his career in Jacksonville, Florida, where he managed projects from early planning through construction during the post-COVID building boom. With a focus on the intersection of design and constructability, Cole enjoys finding thoughtful, practical solutions that put people at the center of every space.

Education

Masters of Architecture.
Clemson University | May 2020

Bachelor of Architecture.
Clemson University | May 2018

Relevant Project Experience

Academic

Fowler Center - Sewanee, TN

Community + Religious

Sri Ganesha Temple Expansion - Nashville, TN

Multi-family

Veritas Village - Nashville, TN
Flagler Crossing - City of Saint Augustine, FL*
Waterstar - Orlando, FL*
St Nicholas - Jacksonville, FL*
Racetrack Road - St. Johns, FL*
Revel Community - Greensboro, SC*
Wilson Avenue - Panama City, FL*
San Jose Homestead - Jacksonville, FL*
Grand Cypress - St Johns, FL*

Civic

Dickson City Center - Dickson, TN
Dickson YMCA - Dickson, TN

*Project experience with previous firm



Ryan Tucker | Project Designer

Assoc. AIA

Ryan joined Southern Architecture Workshop as a Project Designer in early 2025. With a strong background in hospitality design, he has contributed to a range of large-scale projects and renovations across Florida. Ryan is driven by a passion for problem-solving, and he thrives on creating thoughtful, functional spaces. He is dedicated to architecture that not only enhances communities but also elevates the everyday experience.

Education

Masters of Architecture.
Kent State University
Kent | May 2023

Bachelor of Science in Architecture
University of Cincinnati
Cincinnati | May 2021

Relevant Project Experience

Academic

Metro Nashville Public Schools Re-roofs
Whitsitt Elementary School - Nashville, TN
Mt. View Elementary School - Antioch, TN

Master Planning

Grace Christian Academy Masterplan - Franklin, TN

Community + Religious

Dickson YMCA -Dickson, TN
Sri Ganesha Temple Expansion -Nashville, TN
Southall Church Renovation - Franklin, TN
Hyundai + Genesis of Hickory Hollow - Nashville, TN

Mixed Use

Westcourt Orlando - Orlando, FL*
Solid Waste Facility - Tampa Bay, FL*

Hospitality

Postcard Inn Renovation - St. Petersburg, FL*
VAI Resorts - Isle 8 - Glendale, AZ*

Workplace

Great Lakes Cheese Headquarters - Hiram, OH*
Swagelok Headquarters Expansion - Solon, OH*

Multi-Family

The Anderson Apartments - Brentwood, TN*

*Project experience with previous firm



Michael Jenks | Project Designer

Assoc. AIA

Prior to joining Southern Architecture Workshop as a project designer in 2024, Michael began his career at Richard Beard Architects in San Francisco, contributing to high-end residential and hospitality projects across California, Texas, and Montana. He is committed to elevating design quality and to thoughtfully integrating architecture with the land and community, values he strives to embody in his work at SAW.

Education

Bachelor of Architecture
University of Tennessee
Knoxville | May 2023

Relevant Project Experience

Community + Religious

Dickson YMCA - Dickson, TN
Dickson City Center - Dickson, TN
Southall Church Renovation - Southall Church - Franklin, TN
Sri Ganesha Temple Expansion - Sri Ganesha Temple - Nashville, TN

Master Planning

Donelson Christian Academy Masterplan - Nashville, TN

Academic

Metro Nashville Public Schools Re-roofs
Whitsitt Elementary School - Nashville, TN
Mt. View Elementary School - Antioch, TN
Fowler Center - Sewanee, TN

Residential

214 Spruce Street - San Francisco, CA*
Crestwood - Houston, TX*
Dipsea Road - Stinson Beach, CA*

Multi-family

Veritas Village - Nashville, TN

Hospitality

Theorem Ranch - Big Timber, MT*

*Project experience with previous firm

Potential Facility Partner Profiles

General Contractors



OUR STORY IN EDUCATIONAL SPACES

We Build Great Places to Learn.

For more than 75 years, DWC Construction has partnered with schools, nonprofits, and community organizations across Middle Tennessee to build learning environments that strengthen communities. Our experience spans early-childhood centers, charter schools, faith-based campuses, youth development programs, specialty schools, and vocational training facilities.

We understand that facilities play a critical role in a school's success. They shape culture, support instructional models, and communicate a school's mission from the moment families walk through the door. That's why we approach every school project with transparency, care, and collaboration, creating spaces that help founders move confidently from vision to opening day.

TOP WORK PLACES 2018-2025
Tennessean.
DWC Construction Company, Inc. is a 2025 Top Workplace!
8 Years Running

MIDDLE MARKET FAST 50
NASHVILLE BUSINESS JOURNAL 2024

Our Core Values

Quality Excellence
We are committed to excellence in everything we do.

Exceed Expectations
We are committed to serving our clients by exceeding their expectations.

Client Experience
We are part of a team. We each take responsibility for the client experience.

We Care
We treat others the way we want to be treated and show that we care.

A Trusted Construction Partner for Nashville's Schools

WE BUILD GREAT PLACES TO WORK

Our Nashville-area educational experience includes a wide range of clients such as:

CHARTER & INDEPENDENT SCHOOLS

- LEAD Public Schools (4 projects)
- Valor Collegiate Academies
- Nashville Classical Charter School
- STEM Preparatory Academy
- Ironwood Academy
- Genesis Learning Centers
- First Steps, Inc.
- Children's First Montessori
- Encompass School
- Invictus School

FAITH-BASED & PAROCHIAL SCHOOLS

- Christ Presbyterian Academy
- Covenant Presbyterian Church Restoration
- Brooke Meade Church
- St. Paul Christian Academy
- St. Phillips Episcopal
- Southern Hills Church of Christ
- Mount Calvary Missionary Baptist Church
- Former Two Rivers Baptist Church

YOUTH, WORKFORCE & NONPROFIT LEARNING ENVIRONMENTS

- Associated Builders & Contractors Apprentice Training Facilities
- Nashville Youth Opportunity Center
- Oasis Center
- Easter Seals
- Thistle Farms
- ThriftSmart
- Nashville Auto-Diesel College

These projects reflect our deep knowledge of how schools operate, grow, and adapt — and how construction partners must respond to evolving needs, limited budgets, and firm opening dates.

What Sets DWC Apart in the Education Market

- **Deep Experience With Occupied & Live School Environments.**
  We excel at projects that require phasing, safety planning, and zero-disruption strategies.
- **Rapid, Realistic, Mission-Aligned Planning.**
  We help founders understand timelines, construction costs, and key decisions early so they can set achievable expectations from day one.
- **Transparent, Competitive, Open-Book Pricing.**
  We pre-qualify subcontractors, secure multiple bids, and deliver detailed, honest pricing.
- **Weekly Communication You Can Count On.**
  Every project includes progress reporting, photos, two-week look-aheads, scheduling updates, and clear next steps.
- **A Team Built for Long-Term Partnerships.**
  With an average 12-year employee tenure, DWC ensures continuity, accountability, and a consistent experience for school teams.



DWCBUILDS.COM

TOP WORK PLACES 2018-2025 Tennessean.

MIDDLE MARKET FAST 50 NASHVILLE BUSINESS JOURNAL 2024

Nashville Incubator Facility MOU
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How We Support New and Growing Schools

WE BUILD GREAT PLACES TO WORK

A Construction Partner for All Stages of School Development

Schools at all stages - new, expanding, or modernizing, face unique challenges: balancing limited time, evolving community needs, and the responsibility to create safe, functional, and inspiring learning environments. DWC's approach is designed to support school leaders through every step of that journey.

Early-phase Guidance

We engage at the visioning stage to help schools clarify scope, align priorities, understand cost considerations, and establish a realistic path forward before design begins.

Accurate Estimating & Value Engineering

We identify opportunities to maximize value, reduce unnecessary costs, and select durable, long-lasting materials without compromising safety, quality, or functionality.

Smart Scheduling for Non-negotiable Dates

School calendars and opening days are fixed. We build schedules that protect critical milestones, anticipate inspection timelines, and communicate impacts early to keep projects on track.

Support for Design, Permitting & Coordination

We collaborate closely with architects, engineers, owner's representatives, and real estate partners to ensure the design intent matches real-world pricing, constructability, and project goals.

Stakeholder Communication to Keep Everyone Aligned

Administrators, boards, community partners, and facilities teams stay fully informed through structured updates that make the planning and construction process predictable, transparent, and manageable.

Why This Matters for Schools

Successful school facility projects rely on strong communication, aligned expectations, and a shared commitment to creating safe, inspiring learning environments. DWC's approach is built around these principles from the very beginning:

- We communicate clearly, early, and consistently.
- We anticipate obstacles before they become delays.
- We help founders understand what's possible within their timelines and budgets.
- We deliver dependable results that support long-term school growth.

Our goal is simple: Help schools open on time, operate safely, inspire students, and thrive within their communities.

Ready to Support Nashville's Next Generation of Schools

DWC Construction is honored to be included among the facility partners for this year's Nashville Incubator charrette. We look forward to meeting the new schools, understanding their visions, and supporting the teamwork that builds strong learning environments across Middle Tennessee.



DWCBUILDS.COM

TOP WORK PLACES 2018-2025 Tennessean.

MIDDLE MARKET FAST 50 NASHVILLE BUSINESS JOURNAL 2024

Nashville Incubator Facility MOU
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DWC CONSTRUCTION PROCESS

WE BUILD GREAT PLACES TO WORK

DESIGN DEVELOPMENT

Assist with the design documents (drawings):

- Advise on the most efficient and economical means & methods of construction while maintaining design intent and integrity.
- Determine preliminary pricing to assist in decision making process.
- Identify items that could adversely affect the cost or schedule.
- Clarify design details or questions before final bidding.
- Ensure the proposed drawing work with the existing structure.

CONTRACT DEVELOPMENT

A thorough pricing & budget process:

- Pre-qualify all subcontractors and vendors to ensure they have the required experience and sufficient manpower to perform the scope of work on time and within budget.
- A minimum of three bids will be solicited from the pre-qualified bidders for all items, guaranteeing the most competitive price for each line item.
- Manage a thorough Value Engineering process to assist in budget development as well as minimize or eliminate the need for a rede-sign.
- All general condition or self-performed items will be clearly identified. DWC operates with an “open book policy” with its clients.

THE APPROACH

Weekly Meetings:

- Held onsite or online, and through all phases of project.
- Beneficial to catch potential issues early.
- Minimize punch list items at conclusion of project.
- Creates an ongoing conversation surrounding design and scheduling.
- Concludes with jobsite walk through

Scheduling:

- Prior to onset of construction, an initial project schedule will be developed.
- Schedule will outline all critical dates and project milestones.
- All owner furnished services or trades, from furniture installation to security wiring, will be listed in schedule to ensure coordination with construction deliverables.

Progress Reports:

- The Project manager will periodically produce a progress report (frequency to be determined) which will include:
- Schedule updates by trade
- Progress status identifying potential issues to be addressed
- Progress photographs



ABOUT DWC

WE BUILD GREAT PLACES TO WORK

Founded in 1947 as The Drywall Company.

Since the **late 1980's**, DWC has devoted all of its resources and expertise to providing commercial properties excep- tional **interior general construction**, renovations and additions to existing structures across Middle Tennessee, becoming known as Done With Care Construction.

Currently we **employ more than 55 full time trained** craftsmen and support staff. Proudly stated, our average employee tenure is 12 years.

Our longstanding relationships with numerous subcontractors provide for **favorable pricing and performance** for our clients.

Over **80%** of our business is with repeat clients.

We utilize a unique project delivery system for our construction services to ensure successful completion and satisfied clients:

- **Superintendent –** Site Management of your project.
- **Operations Manager** – Seasoned construction professional providing resources and solutions to keep your project on track.
- **Project Manager** – Management of your project from planning to budgeting to completion.

Our **CARPENTERSPLUS™** group offers a unique solution to quickly address small projects and repairs, and is an alternative to independent contractors and handymen.

PROJECT WORKLOAD (AS OF FEBRUARY 2024):

- 26 active projects
- Backlog of work under contract is $23M

With 7 construction project managers, 3 special projects project managers and 21 superintendents, we have the capacity and available resources to provide both the pre-construction services and manage the project if eventually awarded the work.

EDUCATION AND NON-PROFIT EXPERIENCE:

Please see Addendum for list and references.

THE NUTS & BOLTS

GENERAL BUILDING CONTRACTOR

Tennessee License No.
16511 BC-AB Unlimited

BANKING RELATIONSHIPS

Pinnacle Financial Partners
Mr. David Castilaw
Phone: 615.743.8713

SURETY

Berkley Surety Group
Mr. Chris Sellers
Phone: 615.522.5001

PROPERTY & CASUALTY INSURANCE

Arthur J. Gallagher Risk Management Services
Mr. Greg Martin
Phone: 615.830.4280

DUNS

No. 03-482-8970

LIMITS

- Workers' Compensation (statutory requirement) = $1,000,000
- Comprehensive General Liability = $2,000,000 Aggregate Excess
- Umbrella Liability = $10,000,000 (National Union Fire)
- Automobile = $1,000,000

ACCOUNTANTS

Edmondson, Betzler & Montgomery, PLLC
Mr. Joe Edmondson
Phone: 615.916.3101

DOCUMENTS AVAILABLE UPON REQUEST:

- Contractor's Qualification Statement (AIA 305)
- DWC's Employee Handbook
- DWC's Safety, Health, and Loss Prevention Plan
- Certificates of Insurance
- Tennessee Drug Free Workplace

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DANIEL REBULA

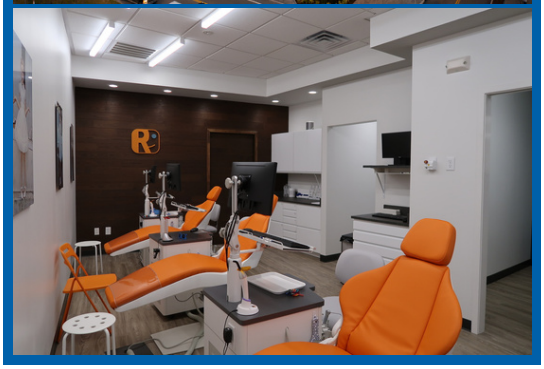
SENIOR PROJECT MANAGER



DANIEL.REBULA@DWCBUILDS.COM







PROFILE

Daniel has 10 years of commercial construction experience. He joined DWC from Charleston, South Carolina as a project manager where he gained valuable construction experience on small and large scale projects. Daniel relies on his prior construction experience and his interpersonal skills to help manage his projects and keep his clients happy.

YEARS IN CONSTRUCTION INDUSTRY: 10

EXPERIENCE

- Trident Construction (Charleston, SC) – Asst. Project Manager 2015-2019
- Harbor Contracting (Charleston, SC) – Project Manager 2019-2022
- DWC Construction – Project Manager 2023-Present

SKILLS

- Estimating & buyout
- Scheduling
- Management of multiple contractors, partners and vendors
- Communication
- Organization of project documents

NOTABLE PROJECTS

- 22 Westedge - Charleston, SC. Eight-story, 156,000 sf Class A office building
- Coastal Kids Dental Upfit - Charleston, SC. 4,800 sf dental office renovation.
- Sweetgrass Pharmacy – Mt. Pleasant, SC. 8,500 sf new-build compounding pharmacy.
- Flex ECT - Nashville. 94,000 sf interior/exterior warehouse renovation
- LevitonLIVE Nashville - Interior/exterior renovation.
- Delta Dental Corporate Office - Nashville, TN. 12,000 sf interior office renovation

FAVORITE QUOTE

"Success is the measure between your performance against your competition. Excellence is the measure between your performance against your own potential."
- Scott Wozniak

TYLER GLOVER

DIRECTOR OF PROJECT MANAGEMENT



TYLER.GLOVER@DWCBUILDS.COM







PROFILE

After beginning his career as Project Manager for a drywall subcontractor in D.C., Tyler moved back to Tennessee to be closer to family and support the Tennessee Vols. As Director of Project Management, he enjoys managing complex projects, leading the project management team, and coming up with unique solutions for project requirements when the opportunity arises. His ability to assimilate information and 'cut to the chase' help to ease the minds of his clients, earning their trust in his ability to produce a great project. Tyler exemplifies our core value 'We are committed to serving our clients by exceeding their expectations.

YEARS IN CONSTRUCTION INDUSTRY: 17

EDUCATION

- Bachelor of Science, Construction Management
- East Tennessee State University – 2006-2008

EXPERIENCE

- DWC Construction Co., Inc. – Project Manager/Director of Project Management, August 2013 - Present
- Interior Specialties, Manassas, VA – Estimator/Project Manager, December 2008 – August 2013

NOTABLE PROJECTS

- Geodis Headquarters - 134,000 SF renovation In Brentwood, TN with complete demolition and new buildout of 3 floors, Lobby and Atrium
- 1222 Demonbreun - First generation build of the 12th and 14th floors totaling 60,000 SF
- Barnes and Thornburg – 20,000 SF First generation buildout for the Law offices of Barnes and Thornburg – $4.5 MIllion
- TVA – 25,000 SF First generation buildout for their new "Technology Forward" office concept - $5.4 Million
- Iron Galaxy – 22,000 sf remodel of a food court and theater into open concept creative space for the video game design team - $2.4 million
- e-Spaces (Multiple Locations) – 15-20,000 sf office remodels creating co-working office space - $1-2 million

FAVORITE QUOTE

"You don't become confident by shouting affirmations in the mirror, but by having a stack of undeniable proof that you are who you say you are"

– Alex Hormozi

CRAIG FULCHER

PRESIDENT & CEO



CRAIG.FULCHER@DWCBUILDS.COM







PROFILE

As President & CEO for DWC Construction Company, Craig is the main point of contact for the client and design team, responsible for all aspects of a project from estimating to buyout to scheduling to punch-list. His experiences with large, complex projects provide Craig with the expertise to manage any project successfully and bring it in on time and in budget. He thrives in a Design/Build scenario; leading a project team that includes the client and architect from project inception to completion.

YEARS IN CONSTRUCTION INDUSTRY: 23

EDUCATION

- Auburn University - B.S. In Finance: 1986-1990

EXPERIENCE

Craig has twenty-plus years of project management experience. He has managed several large projects since joining DWC in 2001. His ability to listen to his clients and work diligently to meet and exceed their expectations was recognized after a relatively short tenure with DWC, where he was promoted to Senior Project Manager after just 5 years, and eventually promoted to DWC President.

NOTABLE PROJECTS

- H3GM – 27,000 SF renovation of AT&T sublease space at AT&T tower
- Frost Brown Todd – 29,000 SF first-generation build-out at Pinnacle at Symphony Place.
- Healthcare REIT – 23,000 SF full building renovation, partially occupied, with a tight timeline and budget. Design/Build method of construction. Winner of the 2008 ABC Excellence in Construction Award.
- Gresham Smith & Partners – Occupied renovation of 6 floors of class A office space in the Nashville City Center.Design/Build method of construction.
- Waller Lansden Dortch & Davis – Occupied renovation of all 7 floors of class A office space in the Nashville City Center. Negotiated project.

CORY BRAMAN

DIRECTOR OF OPERATIONS



CORY.BRAMAN@DWCBUILDS.COM







PROFILE

As Director of Operations of DWC Construction, Cory Braman oversees the day-to-day execution of all construction projects in the Central Business District and nearby areas. He is responsible for resource management, logistics, personnel scheduling and safety compliance. Cory demonstrates our core value that states we are part of a team, and we each take responsibility for the client experience every day

YEARS IN CONSTRUCTION INDUSTRY: 28

EXPERIENCE

- DWC - Operations Mgr./Director of Operations, July 2019 - Present
- Layton Construction - Superintendent, 2018-2019
- Harvest Construction - Superintendent & Operations Mgr. - 2010-2018
- Finish Carpentry, 1995-2005

NOTABLE PROJECTS

- S.T.E.M. Preparatory Academy - 24,000 sf renovation of Metro Nashville Charter School
- LEAD Academy School - 1st and 2nd phased projects for Metro Nashville Charter School
- Flex ECT Nashville - 94,000 sf interior/exterior warehouse renovation
- LevitonLIVE Nashville - Interior/exterior renovation.
- Lifeway Christian Resources - Buildout of 50,000 sf of offices, video, and broadcast suites.
- Polsinelli, Nashville, TN - buildout of 32,000 sf first-generation new office in Broadwest Building

FAVORITE QUOTE

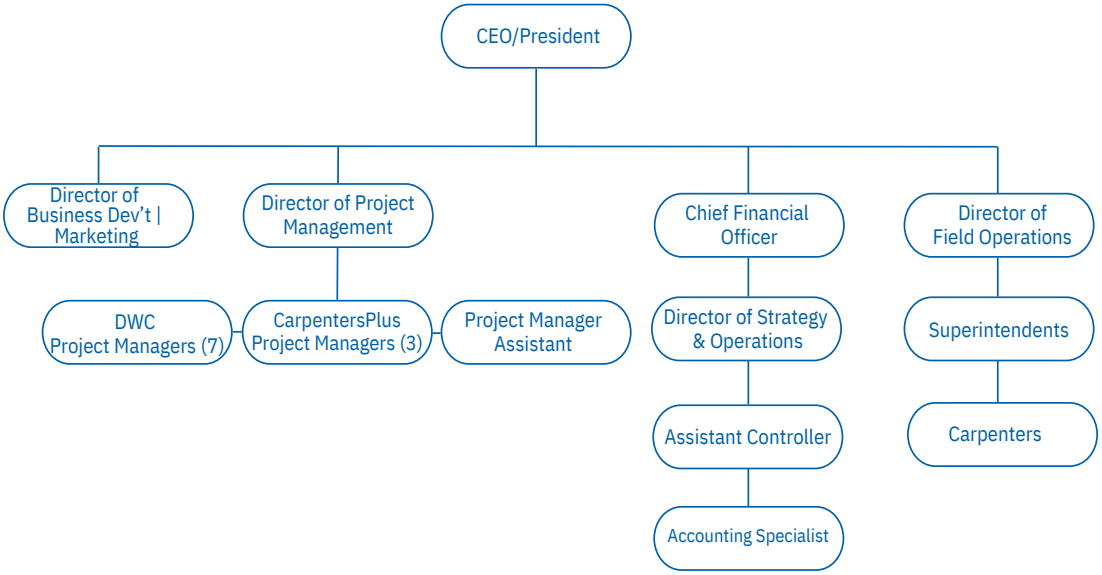
Extreme Ownership. Leaders must own everything in their world. There is no one else to blame."

- Jocko Willink

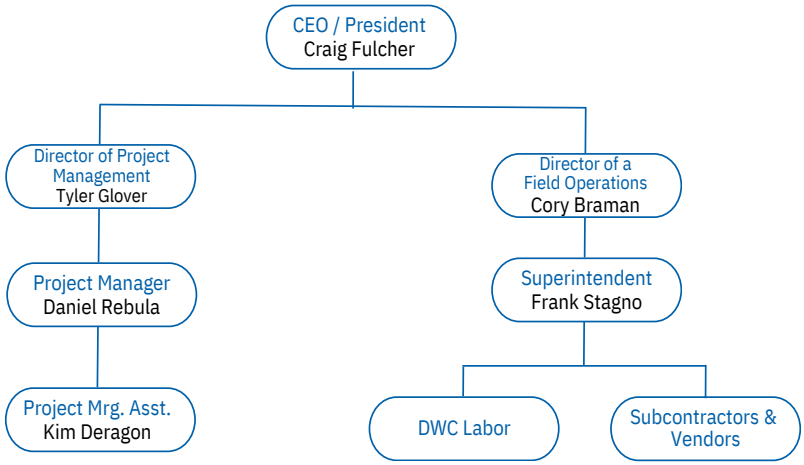
ORGANIZATION & STAFFING

WE BUILD GREAT PLACES TO WORK

CONSTRUCTION COMPANY ORGANIZATIONAL CHART



PROPOSED TEAM



ORGANIZATION & STAFFING

WE BUILD GREAT PLACES TO WORK

PROJECT MANAGER - DANIEL REBULA

- Overall project oversight & responsibility. The Project Manager will be the primary contact for the project, with the exception of daily activities on site, which will be coordinated by the Superintendent.
- Works closely with Superintendent and Operations Manager to monitor the progress of the project.
- Conduct weekly project meetings and subcontractor meetings.
- Weekly progress report with photos.
- All project documents will flow through the Project Manager.

SUPERINTENDENT - FRANK STAGNO

- Onsite supervision of the daily project schedule & all on site activities.
- Oversight and coordination of the various subcontract trades (we expect and require each trade to have their own on-site supervision, so DWC provides oversight of trades, not supervision).
- Primary contact with all Codes Inspectors.
- Primary day to day contact with the client.

DIRECTOR OF OPERATIONS - CORY BRAMAN

- Assists Superintendent with all DWC labor & material scheduling, ensuring sufficient labor is available as required to meet the project needs, as well as all material is delivered in a timely manner.
- Assists with subcontractor oversight when necessary; providing a backup to Superintendent, should difficulties arise with any one subcontractor.
- Available to assist with code inspections.
- Safety program implementation and execution of compliance programs.

PROJECT MANAGER ASSISTANT - KIM DERAGON

Located in Main Office

- Submitting & tracking plans through Codes for the building permit
- Processing subcontracts & purchase orders
- Securing & tracking submittals and samples
- Assures all Codes paperwork is completed in order for the timely issuance of the Use & Occupancy letter

PRESIDENT - CRAIG FULCHER

- Attend pre-construction meetings, assisting with the design, development and budget phase. Craig uses his 20+ years of commercial renovation experience to assist the project team during this important phase of the project
- Attend weekly project meetings as needed
- Available as needed. Provides oversight of construction team



EDUCATION & NON-PROFIT EXPERIENCE

WE BUILD GREAT PLACES TO WORK

- Associated Builders & Contractors (Apprentice Training Facilities)
- Brooke Meade Church
- The Cato Center
- Christ Presbyterian Academy
- Covenant Presbyterian Church Restoration Project
- Children's First Montessori
- Easter Seals
- Encompass Community School
- First Steps Inc. (school for children with special needs)
- Genesis Learning Centers (Murfreesboro/Nashville)
- Invictus Nashville Charter School
- Ironwood Academy
- LEAD Public Schools (4 projects)
- Mount Calvary Missionary Baptist Church
- Nashville Auto-Diesel College
- Nashville Classical Charter School
- Nashville Youth Opportunity Center
- Oasis Center
- Southern Hills Church of Christ
- STEM Preparatory Academy
- St. Paul Christian Academy
- St. Phillips Episcopal
- Thistle Farms
- ThriftSmart (thrift stores)
- Former Two Rivers Baptist Church
- Valor Collegiate Academies

See the attached Charter School brochure

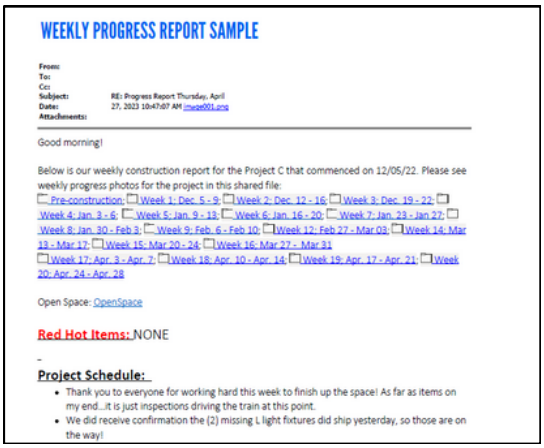
WHY CHOOSE DWC

WE BUILD GREAT PLACES TO WORK

We Prioritize Your Time

At DWC, we know time is money. That's why scheduling isn't just a task—it's a strategy. Our team collaborates closely with owners, architects, and consultants (OAC) from day one to outline project milestones and inspection dates, establishing a clear critical path to completion.

From there, we work with all stakeholders to refine the construction schedule—adjusting as needed until it's both realistic and achievable. These scheduling touchpoints continue throughout the life of the project to keep progress aligned, anticipate challenges early, and ensure your timeline stays on track.



WEEKLY PROGRESS REPORT SAMPLE

From:
To:
Cc:
Subject: RE: Progress Report Thursday, April
Date: 27, 2023 10:47:07 AM image001.png
Attachments:

Good morning!

Below is our weekly construction report for the Project C that commenced on 12/05/22. Please see weekly progress photos for the project in this shared file:
Pre-construction; Week 1: Dec. 5 - 9; Week 2: Dec. 12 - 16; Week 3: Dec. 19 - 22; Week 4: Jan. 3 - 6; Week 5: Jan. 9 - 13; Week 6: Jan. 16 - 20; Week 7: Jan. 23 - Jan 27; Week 8: Jan. 30 - Feb 3; Week 9: Feb. 6 - Feb 10; Week 12: Feb 27 - Mar 03; Week 14: Mar 13 - Mar 17; Week 15: Mar 20 - 24; Week 16: Mar 27 - Mar 31
Week 17: Apr. 3 - Apr. 7; Week 18: Apr. 10 - Apr. 14; Week 19: Apr. 17 - Apr. 21; Week 20: Apr. 24 - Apr. 28

Open Space: OpenSpace

Red Hot Items: NONE

Project Schedule:

- Thank you to everyone for working hard this week to finish up the space! As far as items on my end...it is just inspections driving the train at this point.
- We did receive confirmation the (2) missing L light fixtures did ship yesterday, so those are on the way!

Driven by People, Defined by Results

At DWC, we know great projects come from great teams. We're proud to have a culture that not only attracts high-quality professionals, but keeps them. Our low turnover means you work with a consistent, committed team who knows your project and your priorities.

This people-first culture has made DWC a Top Workplace for seven years—and it's no coincidence we've also been recognized as a Fast 50 company by the Nashville Business Journal. Our growth is fueled by a strong foundation: loyal people, thoughtful hiring, and a commitment to delivering excellence, every time.



Actual scheduling meeting

Communication That Keeps You in Control

Timely updates are critical to keeping a project on track. DWC issues detailed progress reports at regular intervals determined by the OAC team, with the option to easily share them with extended stakeholders.

Each report includes:

- Current schedule status
- A two-week forecast of upcoming work
- Visual documentation through progress photos
- Commentary on RFIs, submittals, revisions, and pending decisions

We make sure you're informed, aligned, and empowered to make timely decisions throughout every phase.

TOP WORK PLACES 2018-2025 Tennessean.

dwc

MIDDLE MARKET FAST 50 NASHVILLE BUSINESS JOURNAL 2024

MOFFITT
BUILDERS
COMPANY
PROFILE
Our Services
Industrial
Educational
Office
Religious
Retail
Values
Authentic
Trustworthy
Quality
Our People
(17) Superintendents
(5) Project Managers
(1) Estimator
(1) Director of Field Operations
(2) Office Admin
History
Founded- December '20
'24 Revenue- 30 Million
Projected '25 Revenue- 40 Million
Notable Clients:
Colliers
Hall Emery
Stream
Thompson CAT
Cushman & Wakefield
www.moffittbuildersllc.com

MOFFITT
BUILDERS

ABOUT US

Moffitt Builders LLC is a Nashville-based commercial construction firm with five years of experience delivering projects throughout Nashville, Tennessee and the surrounding Middle Tennessee area. We understand the unique demands of academic construction, including strict school-year schedules, enhanced life-safety and ADA requirements, and the need to minimize disruption to students and staff. From new classroom buildings and specialty learning environments to renovations, expansions, and phased improvements on active campuses, we bring a practical, hands-on approach grounded in careful planning and clear communication.

We place a strong emphasis on developing and maintaining trusted relationships and pride ourselves on being collaborative, responsive, and easy to work with. Our team values open communication, transparency, and proactive problem-solving, ensuring school leaders and stakeholders feel supported and informed throughout every phase of a project. By working closely with administrators, design teams, and local authorities, we create a smooth and predictable construction process built on mutual respect and accountability. Our goal is to be a long-term partner to the schools we serve, delivering not only quality facilities but also a positive, reliable experience from planning through completion

Please reach out with any questions or if you need additional information
-Ross Moffitt, Owner
Moffitt Builders, LLC

KEY PEOPLE/ORG CHART

Ross Moffitt

Owner/Senior Project Manager

Ross is responsible for the overall success of the project and project team. He will actively be involved in all aspects.

Ben Smith

Director of Field Operations

Ben is responsible for helping Superintendents stay on schedule. He also helps to make sure jobsites stay safe and clean as well as performing routine quality control checks

Project Manager/Assistant PM

Oversees the day to day of the project. They work hand in hand with the superintendent and the overall project team. They are responsible for regular communication, financial transparency, and oversight.

Superintendent

The superintendent is on site overseeing day to day construction activities communicating job progress and milestones to the project team and ensuring quality and schedule.

MOFFITT BUILDERS

APPLICABLE PROJECTS RESUME- MOFFITT BUILDERS

Metro Christian School- Goodlettsville, TN
New Construction SF- 22,000
Renovation SF- 5,000
Project Description: Addition to existing building. Includes new classrooms for school and Church entrance. Remodel existing interior lobby classrooms.
Project Size: 22,000 sf.
Project Cost: $5.6 Million-

Goodpasture Christian School (Currently in Design)
New Construction SF- 40,000
Project Description: New high school building with attached indoor athletic field.
Project Size: 40,000 sf.
Project Budget: $12 Million

Little Wonders- Aventura
Client Name- Angela Goddard - 615-496-4397 agoddard@joecdavisfoundation.org
Renovation SF- 3,168
Project Description: Interior renovation for new school day care- included new playground area Senior
Project Cost: $682,000-

Franklin Classical School
Project Description: Renovation of existing office building into a new school- Multiple phases
Renovation SF- 35,000 SF
Project Budget: $1.6 Million

Intrepid Charter School (Former Company)
Project Description: Renovation of existing Circuit City for new Charter School- Included full gym build out
Renovation SF- 28,000 SF
Project Budget: $2.4 Million

MOFFITT BUILDERS

ROSS MOFFITT- SENIOR PROJECT MANAGER

ROSS MOFFITT

WORK HISTORY

Moffitt Builders- 2021-2025
Title: Senior Project Manager/Owner

Harvest Construction- 2015-2021
Title: Project Manager

Goodall Homes- 2012-2015
Title- Project Manager

NOTABLE PROJECTS

2222 Rosa Parks
Project Description: Multiple tenants for building re-development to multi-tenant use
Project Size: 30,000 sf.
Project Cost: 5.5 Million

Carter Haston
Project Description: First generation build out for new headquarters
Project Size: 10,000 sf.
Project Cost: 1.5 Million

Metro Christian Academy
Project Description: Addition to existing building. Inc new classrooms for school and Church entrance. Rem existing interior
Project Size: 22,000 sf.
Project Cost: $5.6 Million

Goodpasture (In Design)
Project New high school building and indoor athletic training field
Project Size- 40,000 sf
Project Cost: $12 Million

JUSTIN BROWN- SENIOR PROJECT MANAGER

JUSTIN BROWN

Education:
UNC Charlotte-Degree in Construction Management
Certifications:
OSHA 30 hour construction training
DBIA Professional Member
LEED AP BD+C

WORK HISTORY

Moffitt Builders- 2024-2025
Title: Senior Project Manager

Bell Construction- 2018-2024
Title: Senior Project Manager

The Ross Group Construction Corp- 2015-2018
Title- Senior Project Manager

Clayco- 2013-2015
Title- Project Manager

*Justin will be committed part time to this project. His only other project would be Goodpasture- Referenced here

NOTABLE PROJECTS

Tempo Hilton- Nashville, TN (Previous Company)
Project Description: (16) Story hotel in Downtown Nashville- Ground Up
Project Size: 286,000 sf.
Project Cost: $87 Million

Redeemer Church
Project Description: Ground-up new Sanctuary building
Project Size: 10.200 SF.
Project Cost: $4.8 Million

Cumberland Retail Center
Project Description: Ground-up new retail multi-tenant building in Columbia, TN
Project Size: 7,500 sf.
Project Cost: $2.5 Million

Goodpasture (In Design)
Project New high school building and indoor athletic training field
Project Size- 40,000 sf
Project Cost: $12 Million

BEN SMITH- OPERATIONS MANAGER

BEN SMITH

WORK HISTORY

Operations Manager
Moffitt Builders, LLC

Harvest Construction: 2012-2016
Title: Superintendent
Oversaw and managed construction projects ranging from industrial to tenant improvements

CBRE: 2016-2018
Title: Project Manager
Represented Metro Public Schools as owners representative overseeing multiple ground up school projects.

Pinnacle Partners: 2016-2018
Title: Project Manager
Managed construction projects at BNA ranging from new parking garage to restaurant build outs.

Current:
Moffitt Builders: 2021 - Current
Superintendent- 2021- 2022
Project Manager- 2022-2024
Operations Manager- 2024-Present

NOTABLE PROJECTS

ASD/SKY
Project Description: Interior office remodel for new Nashville corporate office.
Project Size: 2,865 sf.
Project Cost: $440,000

Round Hill Music
Project Description: First generation build out. Included stage and sound proof song writing rooms
Project Size: 6,500 sf.
Project Cost: 1.1 Million

Metro Christian Academy
Project Description: Addition to existing building. Includes new classrooms for school and Church entrance. Remodel existing interior
Project Size: 22,000 sf.
Project Cost: $5.6 Million

Carter Haston
Project Description: First Generation Class A Office Space Build Out
Project Size: 10,000 sf.
Project Cost: $1.7 Million

ELIJAH SMITH/ ROBERT MAXWELL
Assistant Project Managers

ABA Goodlettsville
Project Description: Interior office remodel for new disability center
Project Size: 4,500 sf.
Project Cost: $400 Thousand

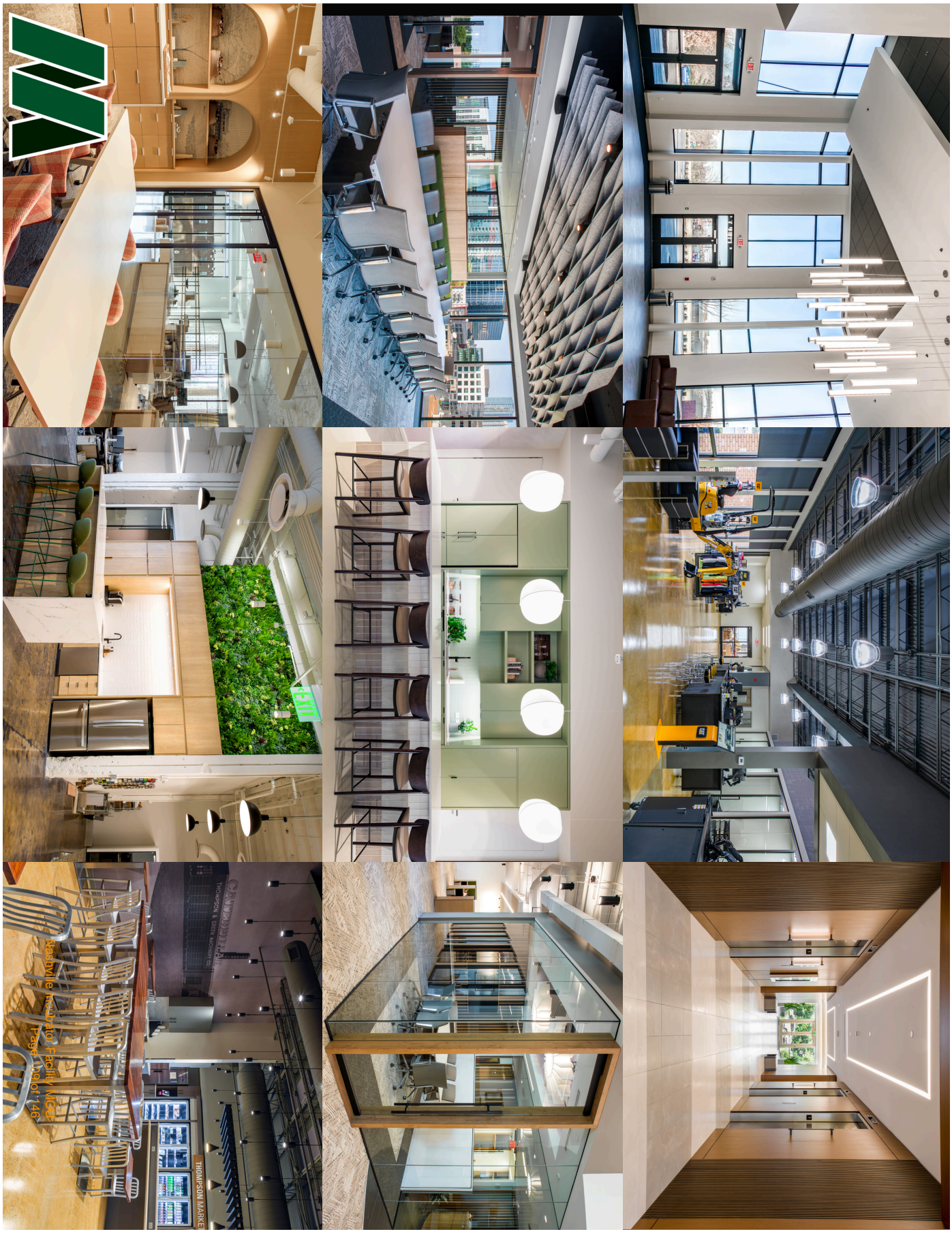
Cooper Steel
Project Description: Interior Renovation- Class A Office space for new corporate office
Project Size: 5,500 sf.
Project Cost: $750 Thousand

Thompson Machinery
Project Description: Interior office remodel and warehouse work. Multiple phases over 2 year span
Project Size: 60,000 sf.
Project Cost: $2.5 million

Nurses Middle College
Project Description: Interior renovation for new Charter School
Project Cost: 286,000 Thousand

Franklin Classical School
Project Description: Renovation of existing office building into a new school- Multiple phases
Renovation SF- 35,000 SF
Project Budget: $1.6 Million

MOFFITT BUILDERS



Nashville Neurotech Facility MCC
Page 109 of 146

CHASE CONSTRUCTION GROUP
EST.1986
EMPLOYEE OWNED
LEADERSHIP | KNOWLEDGE | INTEGRITY | COMMITMENT

Submitted by:
John Morss
Chief Operating Officer
615-777-5900
Email: jmorss@dfchase.com

Request For Information:

Shelby Goodfriend

Director of Facilities

INCUBATOR Nashville

INCUBATOR
NASHVILLE

COMPANY BIO -SIMILAR PROJECTS

Chase Construction Group's experience in education projects is extensive. It includes K-12, both Public & Private, Charter Schools as well as University level projects. Over 150 projects.

In the Charter School sector, over the last 10 years we have completed 20 projects with 769,900 sf for over 8,748 students. Total construction costs for the projects $162,190,454.

All these projects were completed using the CM/ GC method of contracting with 100% of the project savings being returned to the Owner. Some projects incorporated design-build.

CHASE CONSTRUCTION GROUP RECENT SCHOOL EXPERIENCE

SCHOOL	PROJECT	YEAR OPENED	STUDENTS	BUILDING SIZE	GMP BUDGET	FINAL COST	CHANGE ORDER REASONS	SAVINGS / OVERAGE	SCHEDULE
ROCKETSHIP NORTH EAST ELEMENTARY	NEW GROUND UP SCHOOL, 8 AC SITE	2014	471	40,000	$ 5,334,894	$ 5,485,570	ADDED ROAD TRAFFIC CONTROL WORK AND ADDITIONAL STORM SEWER AT THE ROAD	$92,204 RETURNED TO THE OWNER IN GMP SAVINGS	1/9/14-7/29/14, OPENED PER SCHEDULE
ROCKETSHIP UNITED	RENOVATED OFFICE BLDG INTO SCHOOL WITH GYM	2016	530	42,000	$ 4,315,915	$ 4,621,010	ADD SKYLIGHTS, SITE UTILITY RELOCATIONS, ADD LANDSCAPING & HARDSCAPE, ADD OWNER REQUESTED FINISH UPGRADES	BUYOUT SAVINGS TO GMP $319,,551	12/11/14 - 7/1/15 OPENERD PER SCHEDULE
VALOR FLAGSHIP	COMPLETED ADDITION	2015	485	25,000	$ 2,598,431	$ 2,640,980	ADDED TURF FIELD AND PLAY AREA WITH SIDEWALK		2/9/15 - 7/9/15 OPENED ON SCHEDULE
VALOR VOYAGER	CONVERTED A LOWES STORE INTO SCHOOL ADDING A FLOOR LEVEL	2016	489	40,000	$ 6,023,320	$ 6,310,792	INTERIOR FINISH UPGRADES	RETURNED $19,981 IN SAVING TO THE OWNER	2/16/16 - 7/29/16 OPENED ON SCHEDULE
VALOR COLLEGE PREP	FLOOR LEVEL AND ADDITING A GYM WITH INDOOR TRACK	2018	1,197	110,000	$ 13,891,369	$ 14,469,447	ADD MISC INTERIOR FINISHES, SCIENCE CASEWORK , LANDSCAPE & HARDSCAPE		
REPUBLIC HIGH SCHOOL	A 3 STORY CLASSROOM ADDITION AND RENOVATION TO THE EXISTING FACILITY	2017	650	80,000	$ 10,983,740	$ 10,773,988		RETURNED $209,752 IN SAVINGSTO THE OWNER	4/4/17 - 3/1/18 OPENED 2 MONTHS LATER THAN ANTICATED DUE TO WEATHER DELAYS
KIPP - ANTIOCH COLLEGE PREP ELEMENTARY	NEW GROUND UP SCHOOL WITH SOCCER FIELD 14 AC SITE	2018	400	42,854	$ 11,917,566	$ 12,577,584	ADD EXTERIOR CANOPIES, & SCREEN WALL, ADD PLAYFIELD		7/6/20 - 5/19/21 OPENED ON SCHEDULE
REPUBLIC HIGH SCHOOL 3RD FLOOR	INTERIOR BUILDING OF THE 2017 BUILDING ADDITION	2019	ABOVE		$ 1,103,142	$ 1,063,895	RETURNED $39,247 IN BUDGET SAVINGS	RETURNED $39,247 IN BUDGET SAVINGS	10/15/18 - 1/16/19 OPENED ON SCHEDULE
FRANKLIN ROAD ACADEMY STUDENT CENTER	NEW STUDENT CENTER, CLASSES AND CAFETERIA	2109	750	38,000	$ 13,336,471				
KIPP - ANTIOCH COLLEGE PREP MIDDLE SCHOOL	NEW GROUND UP SCHOOL WITH SOCCER FIELD 14 AC SITE	2020	271	49,095	$ 12,917,722	$ 13,645,533	ADD TRAFFIC SIGNALS, SOCCER FIELD UPGRADES		10/4/18 - 7/4/19 OPENED ON SCHEDULE
ENSWORTH LOWER SCHOOL ADDITION	NEW 30,000 SF CLASROOM BUILDING	2021	120	30,000	$ 11,777,431				
KIPP - KIRKPATRICK ELEMENTARY SCHOOL	INTERIOR RENOVATIONS - SECURITY VESTIBULE	2022	433	NA	$ 146,291	$ 153,735	MISC FINISH CHANGES		6/28/22 - 7/25/22 OPENED ON SCHEDULE
KIPP - ACADEMY NASHVILLE MIDDLE SCHOOL	INTERIOR RENOVATIONS - SECURITY VESTIBULE	2022	390	NA	$ 365,254	$ 381,214	ADDED BONDING,REWORK SECURITY TRANSACTION DECK	RETURNED $3,125 IN SAVINGS	6/28/22 - 7/25/22 OPENED ON SCHEDULE
INTREPID COLLEGE PREP	INTERIOR RENOVATIONS	2021	492	30,000	$ 103,315	$ 103,315			4/1/21 - 5/1/21 OPENED ON SCHEDULE
NASHVILLE CLASSICAL CHARTER SCHOOL	COMPLETE GUT AND RENOVATION OF AND EXISTING SCHOOL	2023	120	28,000	$ 1,995,507	$ 2,693,546	ADDED SECOND BUILDING DEMO AND REPLACED HVAC SYSTEM	RETURNED $3,125 IN SAVINGS	2/28/23 - 7/1/2 OPENED ON SCHEDULE
AVENTURA COMMUNITY SCHOOL	INTERIOR RENOVATIONS	2022	120	10,000	$ 277,617	$ 286,242	REPLACE STOREFRONT ENTRANCE		4/1/22 - 7/4/22 OPENED ON SCHEDULE
VALOR FLAGSHIP ADDITION II	ADDITION TO THE EXISTING FACILITY WITH CLASSES AND A STORM SHELTER	2023	50	4,000	$ 1,866,233	$ 1,924,246	ADDED RADIO RESCUE SYSTEM		8/1/23 - 12/31/23 OPENED ON SCHEDULE
KIPP - ANTOCH HIGH SCHOOL BRIDGESTONE	INTERIOR RENOVATIONS	2023	120		$ 229,065	$ 273,351	REVISED INTERIOR TEMP WALL LAYOUT, ADDED MISC ALTERNATES		
KIPP - ANTOCH HIGH SCHOOL	ADDITIONS & RENOVATION INCLUDING GYMS, THEATER, 43 CLASSES, SOCCER FIELD AND CAFETERIA / KITCHEN	2024	1,200	155,951	$ 41,007,171	$ 44,173,135	ADDED KITCHEN, SOCCER FIELD, STORM SHELTER, FACILITY LAYOUT REVISIONS,CLASSROOM LVT, ADDED CLASSROOM CASEWORK, BLDG HVAC MGT SYSTEM, ADDED ASPHLAT OVERLAYING THE PARKING LOT, AS WELL AS OTHER MISC CHANGES.	RETURNED $35K IN SAVINGS	1/20/23 - 7/4/24 ON SCHEDULE
TENNESSEE NATURE ACACDEMY	20 ACRE SITE WITH A 42,000 SF MS / HS / ADMIN / 8,000 SF OURDOOR PAVILION	2026	460	45,000	$ 22,000,000			IN DESIGN	
			8,748	769,900	$ 162,190,454				

3

COMPANY BIO -SIMILAR PROJECTS

In each case of the listed projects, Chase Construction Group worked very early with the Charter School team , Program Manager, and Design team. The goal is to plan the best design for the most effective construction process. Team meetings with early concept drawings establish early realistic budgets and schedules with milestones to ensure a timely finish and on budget projects. A large part of the process includes option planning & pricing for future projects.

To help both Gate School and The Music City Academy the early accurate budgets and overall schedule planning will be critical to get the schools open on time. They key to the budgets will be to review existing buildings for renovation and compare costs for the phase 1, as well as the ability to add additional phases.

Both school have a different style of how they are approaching the teaching environment.

The **Gate School** could focus on either office or existing schools to renovate. The Harkness teaching method is conducive to conference type rooms to student collaborate at a large table, then go to breakout sessions. Examples of this would include conference room adjacent to classrooms or using typical classroom nesting desks to facilitate the collaboration of the students. Please see page 5 for an example.

Music City Academy could look at big box retail or warehouse type facilities to renovate. Both would have the high ceilings to accommodate interior athletic teaching. The ability to have multiple athletic venues would be helpful… Basketball, Volleyball. Indoor football or Soccer require the higher ceilings. The big box spaces are typically lest costly to rent and less costly to build out. One example we have constructed are Valor High Schools Gym with an indoor track. Please see page 6 for an example.

TEAM BIO - SIMILAR PROJECTS

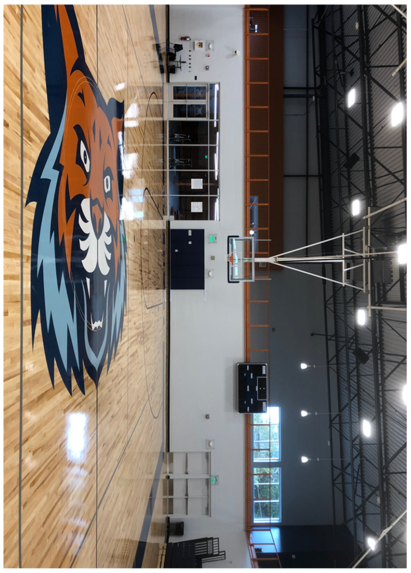
- Different class set ups using nested desks or large tables for the Harkness Method of teaching

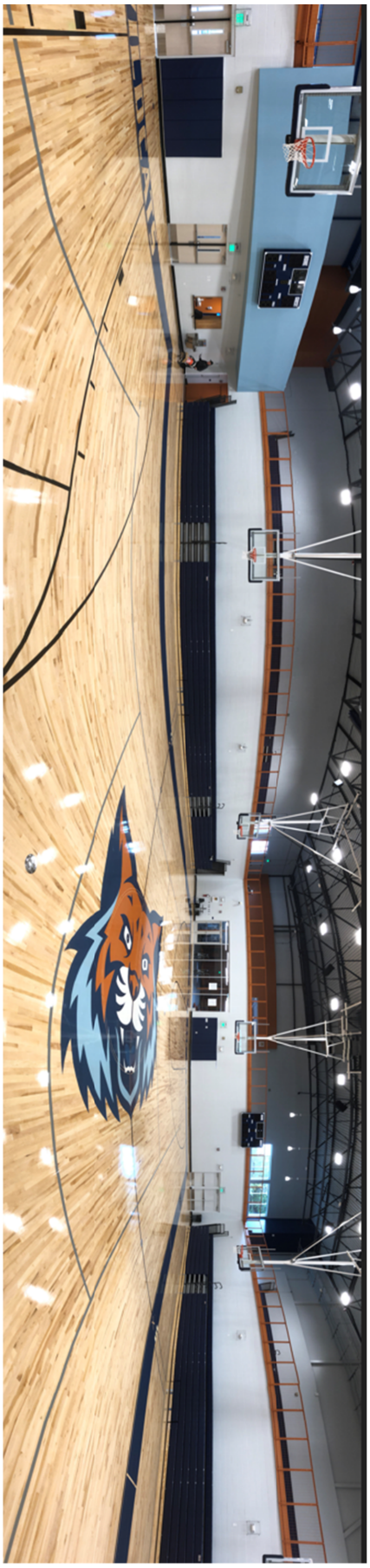


COMPANY BIO -SIMILAR PROJECTS









TEAM BIO -SIMILAR PROJECTS

The Chase Construction Group main point for all educational project is John Morss. Over the last 38 years with Chase, he has been involved in 95% of the educational projects, K-12 Public & Private, Charter Schools, University Level as well as the Big Box Logistics, Office and Hospitality projects.

Sample of these projects are listed on page 3 for Charter & Private Schools. Project descriptions are in the similar project schedules.

The Chase Construction Group is especially well suited to the Charter School projects because of our overall project sector diversity. We use ideas from our Logistics, Office or Hospitality projects like Insulated Metal Panels (IMP) or concrete tilt up / precast panels or grading large site for parking areas, athletic fields, to campus office projects to tie buildings together. Our unique blend of projects helps us bring different materials & scheduling ideas to the team. A brief sample of Mr. Morss' project are shown on his resume that follows.

Mr. Morss was the team leader for the Valor, Rocketship, KIPP & Franklin Road Academy projects shown on the previous pages.

TEAM BIO -SIMILAR PROJECTS



JOHN MORSS
CHIEF OPERATING OFFICER

Mr. Morss joined D.F. Chase, Inc. shortly after the company's inception in the spring of 1987. Quickly rose from Project Engineer to Construction Manager. As a Construction Manager completed numerous Design Build, General Contracting and CM at Risk construction projects. In 1998, he was promoted to Chief Estimator and started the Preconstruction division at D.F. Chase, Inc. Under his direction as Vice President of Preconstruction, the division grew to an average volume of $300-$500 million. In 2006, he was promoted to Vice President of Operations, with overall responsibilities for the Preconstruction and Construction departments. In 2008, he has been promoted to Chief Operating Officer and is still involved in both pre-construction and overall construction operations. Mr. Morss holds the General Contractors license for the State of Georgia. Examples of his major project involvement are listed below.

EDUCATION

- Bachelor of Science in Industrial Engineering with minor in Business Administration Management, University of Tennessee, Knoxville, TN 1987
- Battleground Academy 1981

WORK EXPERIENCE – PROJECTS ARE SHOWN IN CATEGORIES, AND DO NOT INCLDE ALL PROJECTS. ALSO NOT SHOWN ARE OFFICE, LOGISTICS & HOSPITALITY PROJECTS

EDUCATION – CHARTER SCHOOLS
Rocketship North East Elem
40,000 sf – New 2 story School

Rocketship United Elementary
42,000 sf – Office conversion to school

Valor Flagship Addition
25,000 sf Addition

Valor Voyager Middle School
40,000 sf Lowes store Conversion to school

Valor High School College Prep
110,000 sf Lowes store conversion to school & gym

Republic High School Addition & Renovation
80,000 sf 3 story addition with facility renovation

Republic High School 3rd floor build out
15,000 sf classroom buildout

Kipp Antioch Elem Prep
42,854 sf on 8 Acres

KIPP Antioch College Prep Middle School
49,085 sf – 3 story school on 8 acres with a soccer field

KIPP – Kirkpatrick Security Renovations

KIPP – Nashville Academy Security Renovations

Intrepid High School
30,000 sf Interior Renovations

Nashville Classical
28,000 sf Interior Renovations

Adventura Community School
10,000 sf Interior Renovations

Valor Flagship
4,000 sf Storm Shelter addition

KIPP Antioch High School @ Bridgestone
Interior renovation

Kipp Global High School
155,951 Sf Renovation of a 2 story Retail space, including site & soccer field

Tennessee Nature Academy
42,000 sf 3 story school with 23 acre site

PUBLIC SCHOOLS:
Bradley County High School Renovation
Nashville, TN
250,000 S.F.

Cleveland Middle School
Cleveland, TN
182,000 S.F.

Cleveland High School
Addition and Renovation
Cleveland, TN
250,000 S.F.

Arnold Memorial Elementary School Reno.
Cleveland, TN
60,000 S.F.

Ocoee Middle School
Phase I, II, III, IV
Cleveland, TN
120,000 S.F.

Mayfield Elementary School
Cleveland, TN
85,000 S.F.

PUBLIC SCHOOLS:
Pearre Creek Elementary - WCS
Franklin, TN
119,000 S.F.

Brentwood High School - Renovation
Brentwood, TN
100,000 S.F.

Metro Nashville Public Schools
Hume Fogg Magnet School Gym Addition
Nashville, TN
35,000 S.F

PRIVATE SCHOOLS:
Ensworth High School
Nashville, TN
150,000 S.F.

Franklin Road Academy
Student Center
Nashville TN
38,000 SF

Franklin Road Academy
Athletic Center
Nashville TN
38,000 SF

Franklin Road Academy
Chapel Renovation
Nashville TN
20,000 SF

Ensworth
Lower School Addition
Nashville TN
30,000 Sf

UNIVERSITY:
Lipscomb University Allen Arena
Nashville, TN
100,000 S.F.

Lipscomb University Bible Building
Nashville, TN
60,000 S.F.

Lipscomb University Music Building
Nashville, TN
30,000 S.F.

UNIVERSITY:
Lipscomb University Collins Auditorium
Nashville, TN
30,000 S.F.

Lipscomb University
Burton Pharmacy Building
Nashville, TN
90,000 S.F.

Lipscomb University Johnson Hall
Addition and Renovation
Nashville, TN
80 Rooms
45,000 S.F. Addition
30,000 S.F. Renovation

Lipscomb University
High Rise Dorm Renovation
Nashville, TN
9 Floors
80,000 S.F.

Lipscomb University
Parking Garage
Nashville, TN
100,000 S.F

Vanderbilt University – Tennis Center
Nashville TN
75,000 SF

Vanderbilt University – Sarratt Student Center
Nashville TN
75,000 SF

Vanderbilt University – Schulman Center for Jewish life
Nashville TN
20,000 SF

Sewanee - University of the South
Snowden Hall Addition & Renovation
40,000 S.F.

Vanderbilt University – Sarratt Student Center
Nashville TN
75,000 SF

Vanderbilt University – Buttrick Hall

Nashville TN

90,000 SF

COMPANY & TEAM PROFILE
COMPANY OVERVIEW

OUR HISTORY

- D.F. Chase was founded on December 16, 1986 by Dean F. Chase. He earned a reputation as an expert in quality construction, managing high-profile projects in Nashville.
- In 2022 the company became 100% Employee Owned. Our valued team members know what it means to be a beneficial owner. During this same period D.F. Chase, Inc. was renamed to Chase Construction Group, better reflecting our current structure.
- Together, we are invested in the collective success of our clients and each other. Our pride of ownership is evident in every project we complete and further differentiates Chase Construction Group as a true partner to our clients.
- Our TN Contractors License Number is 24764 BC Unlimited.
- Our one office location is 3001 Armory Dr. Suite 200 Nashville TN 37204 Phone: 615-777-5900, Fax 615-777-4544. website: www dfchase.com.

PURPOSE/ VALUES / VISION

- Our values are simple: ***Leadership, Knowledge, Integrity & Commitment.***
- All these values and our mission are stated in our corporate philosophy below.
- The Chase Construction Group philosophy is to provide our clients with a thorough analysis of their project and to assist with the selection of the most cost-effective solutions to meet their needs. We understand the importance of establishing a realistic budget, schedule and pledge our talents and energy to exceed the Clients quality expectations. At CCG we believe this "SERVICE" philosophy is value added to each project for each client and transcends through every aspect of the project journey and delivery.

SAFETY

There is nothing more important to us at Chase Construction Group than maintaining a safe and secure work environment for all. The Associated Builders and Contractors (ABC) has recognized Chase Construction Group with its world-class safety standards and the STEP Safety Management System Diamond designation. A designation reserved for top-performing members.

Our valued team members are our most important asset and maintaining employee safety and health remains a top priority. We apply resources necessary to manage and control safety to the best of our abilities and within our control. When providing personal protective equipment or training, our goal is to promote a culture of safety throughout every phase of our work. We leverage our experience in project-specific safety plans tailored to address best practices, and economy, on all our job sites. Everyone at Chase Construction Group are deeply committed to safety.

RECOGNITION

- Chase Construction Group is nationally ranked as one of Engineering News-Record's (ENR) Top 400 Contractors. Locally, in Tennessee, we continually remain in the top 3 General Contractors based based in State. We have successfully built projects across the United States and continue to grow our reputation in the industry as a quality construction services firm with integrity. Everyone of our employee-owners is focused on client satisfaction and performance. We have the capability to estimate and manage most types of commercial construction projects. However, the most significant recognition we receive is repeat business from our valued clients.

ABOUT US....CONTINUED
DIVERSITY AND INCLUSION

On a construction site, the contributions and collaboration of a diverse team of individuals create outstanding results. Day in and day out, the benefits of diversity and inclusion – fresh perspectives, heightened creativity, better problem solving, and increased professional development – are continually reinforced to us as construction managers.

The purpose of Chase Construction Group's Diversity and Inclusion program is to expand our partner base of emerging, diverse-owned firms in historically underrepresented populations.

We recognize the many benefits and outsized impact inherent in partnering with disadvantaged business enterprises (DBE). We embrace diversity and inclusion because it creates opportunities for diverse communities and for us as a business.

Chase Construction seeks partners capable of performing high-quality construction at competitive prices and on schedule. Chase Construction Group and its subcontractors do not discriminate on the basis of race, color, religion, age, nationality, or sex in the award and performance of contracts.

ETHICS AND CODE OF CONDUCT

Like a building, our business and reputation are only as strong as our foundation. Chase Construction Group is built on a decades-long insistence on providing exceptional service and outstanding quality construction for our clients, partners, and colleagues.

We are dedicated to creating a culture where everyone we work with is treated with dignity and respect. We take ethics, codes, and compliance seriously. Honesty, integrity, transparency, and reliability are crucial components in everything we do.

GENERAL PRE-CONSTRUCTION / CONSTRUCTION

At CCG, we believe in being good stewards of the owner's time, money, and trust. This philosophy is simple but one our project managers and superintendents live by. The pre-construction phase of any complex project is crucial to its overall success..

Our multifaceted pre-construction approach is deliberate and thorough to ensure all owners' requirements and provisions are communicated and understood.
The next phase includes a comprehensive analysis of the project's components:
Site, context, history, program, goals, budget,
Sustainability principles, schedule, lifecycle
Cost versus first cost, project management,
Communication, and construction means and methods.
We assemble the most qualified and experienced team of professionals available. The subcontractors we choose are the best in the market and have the experience and the capacity to execute the project on time and on budget – without compromising quality. We designate senior staff members to manage complex projects and create solutions, allowing us to avoid pitfalls while maximizing the probability of success.

We excel at managing complex projects for owners. Our nearly 40 years of experience confirms every aspect of managing a job site and the building process has proven results. We are a service provider and realize we are only as good as our reputation. This drives us to excel in all aspects of construction management. As your general contractor, CCG is responsible for the entire job from start to finish, including day-to day oversight of the construction site, management of vendors and trades, material sourcing and deliveries, and the complete building process. We coordinate all work, keeping communication between the owner and involved parties open and transparent throughout the project. Our teams are proud of the work they do and strive not only to deliver on-time and on-budget but make the process as easy as possible for the Owner.

The process promotes LEAN construction as detailed in the PROJECT APPROACH section.

PROJECT APPROACH

Chase Construction Group's (CCG) approach to the project is broken down into phases.

This approach is tailored to the specific project. Our project approach includes the following.

- COMMUNICATION
- LEADERSHIP
- SAFETY
- PRE-CONSTRUCTION
    - DESIGN PROCESS
    - BUDGET DEVELOPMENT
    - SCHEDULE DEVELOPMENT
- SITE DESIGN LAYOUT
- BUDGET ADHERANCE
- SCHEDULE ADHERANCE

COMMUNICATION

Communication is the driving factor in all successful projects. Clearly defining the goals of the project starts from the top down and flows from preconstruction, through construction, and project closeout. CCG works diligently on the front end to understand these goals from the owner and relay them into the subcontractor solicitation process. This helps identify the proper team to deliver the project on time and under budget. During construction, the project manager and superintendent strive to effectively communicate all procurement, schedule, and cost items to ensure the overall budget and schedule are tracking from beginning to the closeout of the project.

- Kick off meeting to establish & review goals.
- Weekly design meeting with the entire team. All meetings have minutes to track action items.
- Individual meeting with designers and subcontractors to ensure we are designing LESS than the budget

LEADERSHIP

John Morss will serve as the Project Lead for the project as a smooth transition from Preconstruction to the Construction phase***. John has completed over 100 education projects.*** John will provide guidance to the Chase team in all facets of preconstruction and construction. John will lead the CCG team and establish an effective management plan to quickly and clearly define the goals of the project and to determine how successful progress will be measured. During Preconstruction Phase services, John will work closely with the CCG preconstruction team and provide pricing for estimated cost of construction, reconcile and monitor the pricing, solicit subcontractors and verify the project pricing. During the Construction Phase services, he will provide oversight and monitoring of the safety plan, administer contracts, and lead communications with all project stakeholders. In addition, he will coordinate all construction meetings, produce the baseline project schedule and updates, monitor cost controls, record daily logs, supervise the QC plan and coordinate closeout and project turnover.

Russell Weatherford will lead the Preconstruction Phase services. Russell has been involved with numerous education projects. During the design and preconstruction phases of the project, Russell will lead our efforts and provide overall guidance and leadership. Russell and John will develop a master preconstruction schedule to ensure that key milestones such as design deliverables, budgeting, permitting, and purchasing deadlines are monitored and maintained. They will establish a preconstruction cost item process for tracking and monitoring specific critical costs and alternate systems or construction options as the design develops. This process will allow for comparative cost analysis of individual items, materials, or systems for the team's review to ensure decisions are consistent with the primary project goals and objectives. This value analysis will include first cost evaluation and life-cycle cost analysis to provide a full understanding to the entire team. Russell and John will prepare a bid packaging analysis for the project to align with the schedule and cost for review and approval by the project team. The bid package analysis will include evaluation of time sensitive procurement strategy, pre- qualification recommendations for subcontractors and a comprehensive sustainability strategy. He will conduct detailed constructability reviews of contract documents prior to bidding. We will provide the project team a detailed analysis and comment log to identify potential issues with the drawings, specifications, and proposed construction contracts to ensure each item of work transitions into the construction phase with minimal coordination. Russell will have 1-2 project engineers working on these items with him.

Our Construction Manager, will work closely with John, and Russell as the preconstruction process is established. The Construction Manager will work to stimulate bidder interest, facilitate bid packages, administer the bid process, and establish the GMP. Site logistics and delivery coordination will also be led by the CM during the preconstruction phase. Once construction begins, The CM will lead the charge in establishing lines of communication for contract documentation, administering construction contracts, and manage RFI, shop drawing, and material procurement. In addition, Daniel will coordinate and facilitate all construction meetings, develop and monitor the construction schedule, monitor cost control, record daily logs, produce daily reports, and deliver warranties, guarantees, and closeout documents.

Our Project Superintendent, will be director of supervision and have authority for decisions in the field.. The Superintendent will manage the Chase field staff, subcontractors, and vendors including responsibilities for project schedule, quality control, and safety.

PROJECT APPROACH



Bryan will work with Daniel to establish a site logistics plan, as well as coordination of material deliveries so as not interfere with other site operations.

John Caro

John, is our safety director. He will be coordinating our preconstruction efforts for planning and will be working with our on-site safety staff and 3rd party inspection team.

SAFETY

The Safety Program at Chase Construction Group begins at the corporate level with the goal of zero-incident jobsites. It is of the utmost importance that everyone goes home each day in the same condition as they arrived. This commitment to a culture of safety aligns with CCG's philosophy that people are the most precious asset of every organization. Driven by this aim, systems of preplanning, training, and management are in place to ensure jobsites are free of recognizable hazards, to protect all workers, the public, and the environment.

The Chase Construction Group Safety and Health Manual is a documented program that specifies policy, procedure, and responsibility, demonstrating the full support of upper management. The expectations at D.F. Chase require 100% compliance with workplace safety as a condition of employment, with enforcement, disciplinary action, and zero tolerance policies in place.

The Safety Training Program at Chase Construction Group equips our leadership teams with basic knowledge, from OSHA regulation and life support to the more complex processes of safety plan development, subcontractor, and site management. Project teams are OSHA 30, First Aid, CPR & AED certified, and trained to develop and execute site-specific safety and emergency response plans. A written Emergency Action Plan and Site Safety Plan are prepared at the early stages of every project. These detailed plans consider response procedures for a serious or fatal injury, fire, extreme weather, bomb threat, shooter, environmental, and workplace violence emergencies.

Documented Safety Management Program utilized and enforced at jobsites:

- Corporate Safety and Health Plan
- Site Specific Safety Plans
- Emergency Action Plans
- Subcontractor Site Safety Plans
- Subcontractor Hazard Communication Program, Chemical List & Safety Data Sheets (SDS)
- Site Safety Orientation Program (onsite or online)
- Pre-task Safety Meetings, Job Hazard Analysis, and Toolbox Talks
- Subcontractor Inspections of jobsite, tools, equipment, and PPE
- Designation letters and copies of valid certifications for all competent persons
- Zero Tolerance Policies: Fall Protection, Substance Abuse, Harassment Free Workplace, No Weapons, PPE Requirement, and Disciplinary Policy
- Periodic Jobsite Safety Inspections: by project managers, superintendents, safety director, and 3rd party safety consultants to confirm and enforce compliance with D.F. Chase Policy and OSHA regulations including but not limited to the following:

(• Accident, incidents, or near misses investigations • blasting and demolition • competent persons designated and qualified/certified requirements (crane, heavy equipment, forklift operators, riggers, confined space, excavation/trench, scaffolds, welders, etc.) • confined spaces • controlled access zones • egress paths and exits • EAP (signaling device, emergency maps, contacts, and medical locations posted,) • electrical (boxes, cords, ground pins, GFCIs, lighting, LOTO, panels, receptacles, etc.) • excavations and trenching • fall protection/prevention (guardrails, holes, nettings, PFAS, warning lines, etc.) • fire protection/prevention (extinguishers, flammable/combustible storage, hot work, etc.) • hazard communication (SDS, site safety plans, signage, federal and state postings, etc.) • health hazards and infection control • heat illness prevention • hoists • housekeeping and sanitation • impalement hazards • inspections • ladders and stairs • material storage • mechanized equipment • medical supplies and first aid/CPR certified competent persons • MEWP/lifts • proper attire and personal protective equipment (PPE) • public safety and pedestrian traffic • respiratory and silica protections • safety meetings, health and safety manuals, site specific safety programs, JSAs/JHAs, toolbox talks, safety orientation, hardhat stickers, and sign in logs • scaffolding • SWPPP mechanisms and erosion controls • temporary heating • tools (hand, power, powder actuated, etc.) • traffic control • utility markings • weather monitoring • zero tolerance and general policies compliance •)

CCG requires the immediate remedy and reporting of jobsite hazards or unsafe conditions, as well as accidents, incidents, and near misses. We investigate, perform root cause analysis, and extract lessons learned to help educate and communicate awareness, prevent future occurrence, and continually improve our safety program.

Our approach to safety on the educational projects ties into our corporate plan. Our corporate plans already require site badging as listed in the RFP for the CCG staff this will be extended to our subcontractors for this project. We also already do 3rd party safety inspections weekly. For this project, with the height of the building approaching 30 ft, a full time safety manager will be on site while the building is being erected & dried in. A monthly safety meeting will be held with all team members on site. All DF Chase's superintendents and assistant superintendents hold a 30 Hour OSHA Cards and are designated as the competent person on site.

PROJECT APPROACH

PRECONSTRUCTION AND CONSTRUCTION APPROACH

Pre-construction:

The initial meetings engage all stakeholders from the design team, Owner Reps, the school team. codes officials, etc. to review the overall project goals.

Our Team along with our subcontractor team will work with the Design team to review and confirm material cost of each space to make sure the products has the correction function and are with in budget constraints.

- Lighting and electrical requirements
- Water & sewer requirements
- Space finish requirements
- Exit / Entrance requirements
- Connection requirements to other spaces
- Daylighting requirements
- Is the space public facing or used by the public

From this information we will confirm the budget pricing and propose Value Engineering Options.

From a site perspective the following items are reviewed to make sure we have the most cost conscience solution.

- Easements & restrictions
- Site utilization
- Site access
- Site utility connection points
- Stormwater management options
- Connection point to the taxi ways
- Landscaping requirements
- Parking Requirements
- Delivery requirements
- Future building and facilities

Chase Construction Group will also provide options for products for value analysis. This ensures str

Adherence to the budget.

SCHEDULE

At the very beginning of the pre-construction a preliminary schedule is developed including all design stages, review steps, permitting steps, reviews and construction durations. This schedule is reviewed at each meeting ensuring strict adherence to it and updated bi weekly. CCG will work with the design team to produce a plan delivery schedule that enables us to capture materials well in advance of need enhancing the speed of the project. As part of the early project development long lead time items are identified and scheduled. CCG fully understands the need for a schedule the produces a plan to succeed. Project schedules using Microsoft Project software are prepared by our preconstruction team prior to bidding of subcontractors to establish time expectations that can impact subcontractor cost and must be accounted for in the estimating process. This schedule is presented as part of the bid solicitation process and in the pre-bid conference before bids are received. Subcontractor "buy-in" of schedule is established during the bidding process and any comments that might impact schedule must be provided as part of bid response. It is understood and communicated "duration is a function of manpower and planning" and not meeting the schedule is unacceptable. The schedule is also broken down into areas with in an overall project.

EARLY CONCEPT BUDGET

1. LINE ITEM BUDGET WITH QUANTITIES AND UNIT COSTS WHICH CAN BE TRACKED.

2. LISTED GENERAL CONDITIONS / GENERAL REQUIREMENTS

3. TRACK ALL ITEMS DURING EACH PHASE OF DESIGN, BID, CONSTRUCTION

PROJECT APPROACH

Tracking with the concept drawing / budgeting aspect of the early pre-construction phase is the review with local codes officials and the Charter School team.

The line-item budget is reviewed and compared to the last generation. Budget derivations to the last step are anticipated, confirmed and understood prior to acceptance. Then a GMP will be established after all pricing is completed.

SUBCONTRACTORS

As part of this project, we would recommend bidding the Sprinkler, Plumbing, HVAC & Electrical out early as design / build. This fixes these portions of the project budget early, eliminating escalation, over design and many possible changes. Depending on the Frame of the building, this can be done early as well.

The other subcontractors will price the project as drawings are completed.

We will ask multiple subcontractors on every trade.

CONSTRUCTION

With the management team being involved with the pre-construction the transition is virtually seamless.

The construction approach like pre-construction is all about communication.

The project shall be staffed on site with a full-time superintendent and project engineers as needed, an assistant superintendent as needed and a safety manager will make regular visits for the project.

The first part of communication is the site logistics plan. Typically, we would fence or gate the site so it is secure & safe

The layout is Ideal with the site job trailer new near the gate.

The tools used for COMMUNICATION during the construction phase of the project are as follows.

Word / Adobe / Bluebeam for misc. documents & meeting minutes

Project meetings are scheduled weekly during both pre-construction and construction phases. This keeps the team on task and accountable. A monthly Owner / Architect / Contractor (OAC) meeting is scheduled to review invoicing and other outstanding issues and to confirm schedule updates.

- Microsoft Project for scheduling

The project schedule flows from the pre-construction phase into construction. The schedule is reviewed and updated biweekly. With the schedule broken down into areas it's easy to track progress and ensure the completion dates. See the proposed schedule from pre-construction.

- Timberline for accounting and contract writing with subcontractors.

SAGE Timberline is our document management software. Our subcontractor contracts and change orders are generated here and updated. The subcontractor / vendor invoicing is completed in this program. The subcontractor license, bond and insurance information is with in this system as well. This integrated system allows for double checking all requirements prior to payment of subcontractors and allows for an easy audit trail.

- Plan Grid for document (plans) management.

Plan grid is a tool to manage all the project plans from start to finish. The system allows for plan overlay to easily show and track plan changes. This program is a required use for all DFC subcontractors with their on site supervision so the latest documents are always available to the field staff. Within Plangrid all submittals are tracked as well. All walk throughs during the project and at punch list are integrated into the program. This allows for pictures, note taking and direct email showing the plan, the picture and email question or punch list item. With all team members, including Embraer on this platform, project Submittals, RFIs, Punch list information will flow quickly.

- Raken for site reporting & documentation

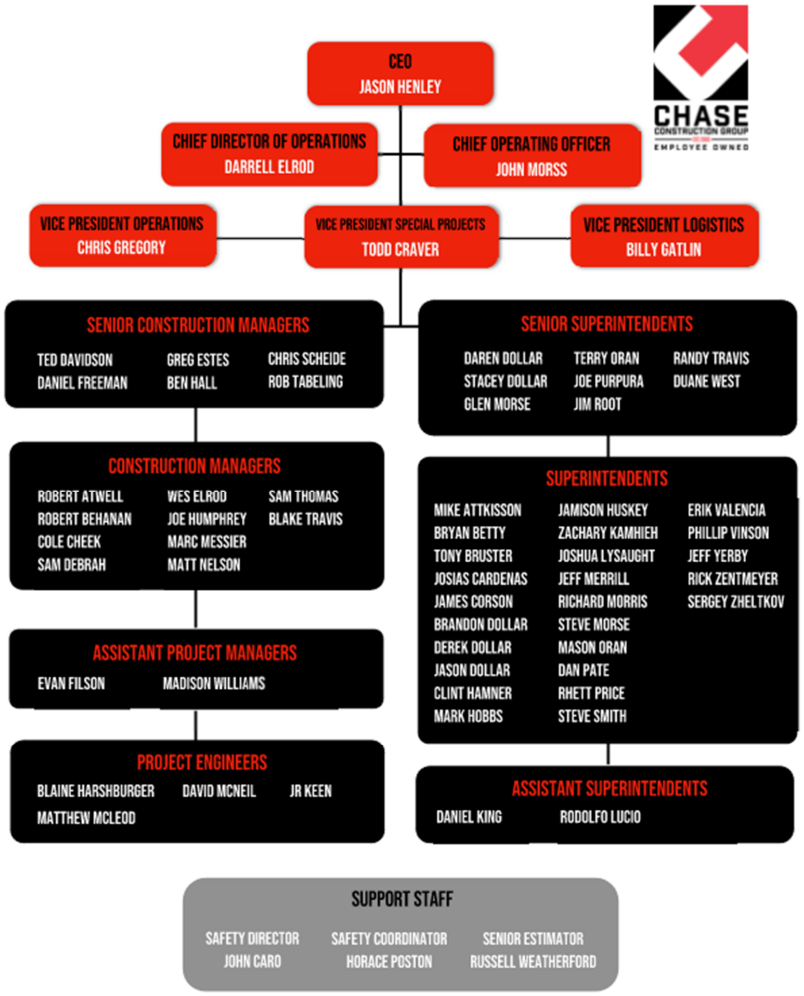
Raken is a software platform for daily reporting. All team members input daily reports, safety information, crew sizing, etc. into the system each day. This information, along with daily pictures give a continual flow of the site progress.

Samples of all the documents are shown in the attachment section.

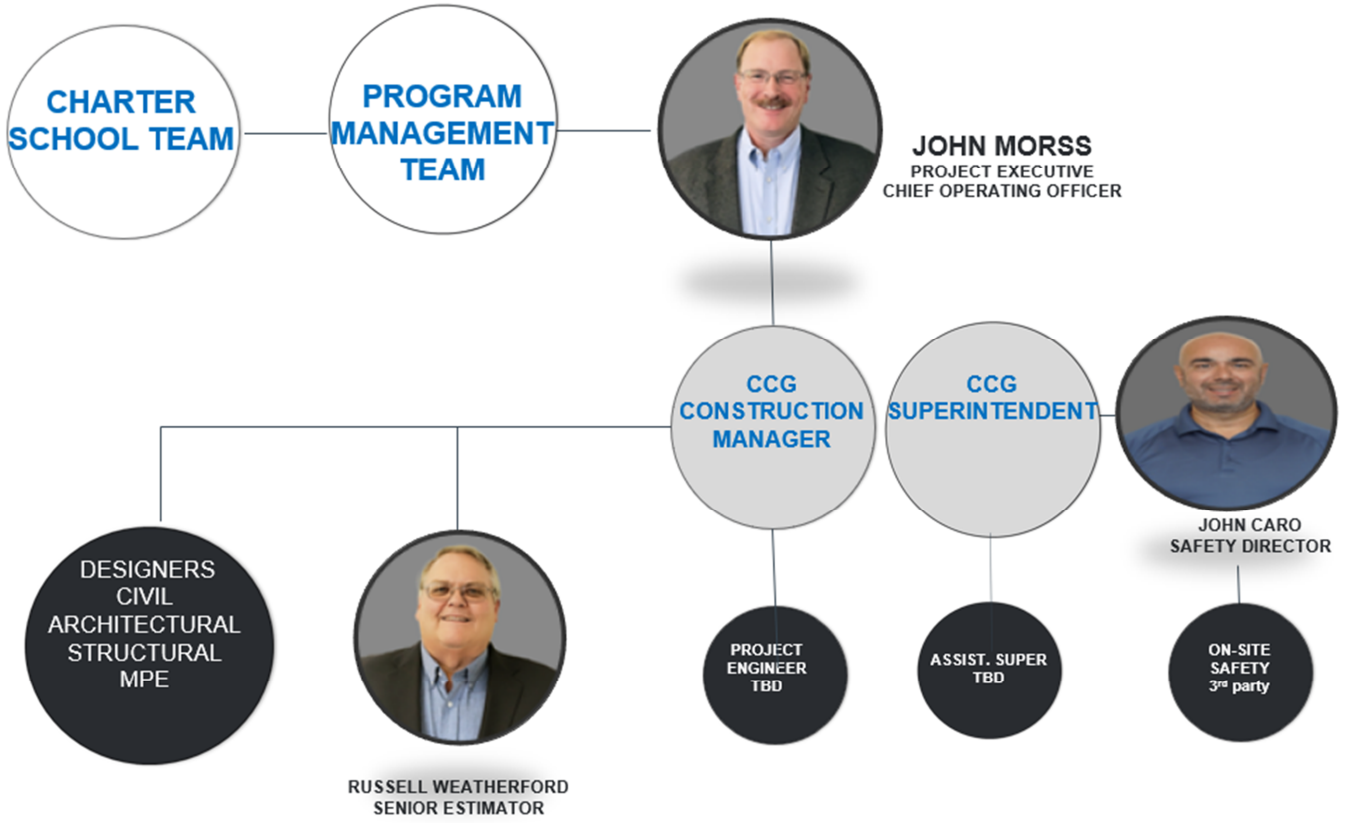
The constant communication along with the known team members ensure a successful project.

COMPANY ORGANIZATIONAL CHART

The company organization chart shows the depth the Chase team from the executive team members thru the Senior Construction, Construction Managers, Project engineers and Superintendents



TYPICAL PROJECT STRUCTURE



TEAM RESUME'S



CHRIS SCHEIDE
SENIOR CONSTRUCTION MANAGER

•Mr. Scheide has over 16 years experience in the construction industry as an Estimator, Assistant Project Manager, MEP Coordinator and as a Project Manager. He has been a Senior Construction Manager for D.F. Chase, Inc. for the last 9 years
•

EDUCATION

Bachelor of Science in Management
University of Central Florida, Orlando, Florida

LICENSES & TRAININGS

OSHA 30 training Complete

KIPP Highschool
D.F. Chase served as CM @Risk for the new Kipp High School. The existing building is a two-story structure approximately 200,000 sf that was a complete tear out of each floor. The interior consists of the use of over 40 new skylights utilized to provide nature light into the interior classrooms. The existing escalator area was repurposed as a large two-story science atrium with skylights, a monumental stair and a mezzanine level connecting to the 2nd floor. Over half of the existing covered parking structure was demoed and a new structural steel gym was erected with a 2nd floor overlook that ties back into the main entrance. The main 1st floor entrance is a two- story lobby with a flared concrete and steel monumental stair. The 1st floor consists of locker rooms, weight training room, band rooms, a full service cafeteria and a future space for a large auditorium. An 8,000 SF storm shelter addition was added as part of the cafeteria that consists of CMU walls and concrete roof deck. The back of the 1st floor will be utilized as a small parking garage for staff. The 2nd floor consists of over 50 classrooms, breakrooms, admin spaces and expansive corridors. The sitework consists of separating the parking lot areas from the two different property lines with new curbs, drive lanes and storm drainage. A large portion of the upper parking lot was converted into a new regulation sized soccer field.



Valor High School, Nashville, TN
D.F. Chase served as CM @ Risk for the new Valor High School project in Nashville, Tennessee. The 111,000 square foot facility was completed in August 2018. The facility ties on to the Valor Voyager Middle school completed in 2016 by D.F. Chase. The project repurposes a Lowe's store adding a complete internal second floor, and includes 46 classrooms, 6 labs, teacher offices, extensive break out areas, a full gym with locker rooms and an indoor elevated track, kitchen/server areas, and music rooms.



Republic High School, Nashville, TN
The Republic High School project consists of a new three-story, 55,000 square foot addition that connects the existing campus buildings together. The facility has a contemporary design that incorporates steel-framed construction and an insulated metal panel exterior. The project site consists of a ring road that loops around the campus, 157 parking spaces, sidewalks, landscaping and bioswales. The facility has classrooms, staff offices and a servery for student meals. Code compliance upgrades occurred in the existing building spaces and consist of fire alarm, HVAC, electrical, and plumbing upgrades. A courtyard encompasses the center of the campus for an ideal greenspace and outdoor learning experience.



KIPP College Prep Elementary School, Antioch, TN
D.F. Chase, Inc. served as CM @ Risk for the new KIPP Antioch College Prep Elementary School in Antioch, Tennessee. The 49,000 square foot facility was completed in July 2019. The facility is on a 22-acre site that will eventually be a full campus for a middle and high school. The school consists of a two-story building with classrooms, administrative space, a lunch room with a warming kitchen, and a full gym with basketball courts and bleachers. The façade of the building consists of a steel structure with insulated metal panels and aluminum storefronts. There is a loop road with parking spaces, landscaping, sidewalks, bus drop-offs and bio and retention ponds.



TEAM RESUME'S



MATT NELSON
CONSTRUCTION MANAGER

Mr. Nelson has eight years experience in the construction industry as an Assistant Construction Manager and Construction Manager. Matt joined the D.F. Chase team eight years ago in 2017, and currently serves as a Construction Manager for Chase Construction Group

EDUCATION

- Auburn University, Bachelor of Science in Building Construction
  Magna Cum Laude - December 2012
- Graduate of Franklin Road Academy

Franklin Road Academy Student Center and Athletic Center
Nashville, TN

In the fall of 2017, Franklin Road Academy selected D.F. Chase as General Contractor to build their new Student Center. This 38,000 square foot facility became the central hub of the school and provides all students with a state-of-the-art dining hall/cafeteria and classrooms. Located in the heart of campus, D.F. Chase had to tear down the existing structure, construct and connect to the existing high school while not affecting operations of three adjacent active buildings. Simultaneously, all primary utilities on campus had to be re-routed and swapped over during the school year. In conjunction with this project, D.F. Chase also renovated the school's existing chapel, constructed a drop-off canopy for the lower school and is under construction on an approximate four million dollar,14,000 square foot athletic center.

LICENSES & TRAININGS

OSHA 30 Training Complete





CHASE CONSTRUCTION GROUP
EMPLOYEE OWNED

Franklin Road Academy Chapel, Nashville, TN

D.F. Chase renovated the existing church and chapel space on FRA's campus. The project consisted of selective demolition, demolition and replacement of the entire existing drywall ceiling, addition of new LED downlights and chandeliers, new flooring, stage reconstruction, and new pew seating. Completed in four months in early 2018, D.F. Chase also retrofitted the entire church building with a new fire protection system, fire alarm upgrades, and new restroom facilities. Sitting atop the building is a new bell tower. The bell tower plays a variety of hymns, bells, and is capable of a multi-scene lighting display through a state-of-the art exterior lighting package.





The Ensworth School, Nashville, TN

D.F. Chase was hired in 2020 to construct a new 30,000 square foot classroom addition at the lower school campus for The Ensworth School. The project encompasses new classrooms and offices, learning spaces, renovation to multiple buildings on campus, and a new playground area. The project is expected to be complete Spring 2022. Also included in this project was interior renovations to multiple buildings on campus, re-roofing, replacement of existing EIFS and construction of a new outdoor playground area.



TEAM RESUME'S



BRYAN BETTY
SUPERINTENDENT

Bryan Betty has worked in the construction industry for 36 years, with 28 of those years being employed by D.F. Chase, Inc. He started his career as a carpenter and assistant superintendent but has spent the majority of the time as a superintendent.

EDUCATION

Madison High School, Madison, Tennessee

KIPP College Prep Elementary School, Antioch, TN
D.F. Chase, Inc. served as CM @ Risk for the new KIPP Antioch College Prep Elementary School in Antioch, Tennessee. The 49,000 square foot facility was completed in July 2019. The facility is on a 22-acre site that will eventually be a full campus for a middle and high school. The school consists of a two-story building with classrooms, administrative space, a lunch room with a warming kitchen, and a full gym with basketball courts and bleachers. The façade of the building consists of a steel structure with insulated metal panels and aluminum storefronts. There is a loop road with parking spaces, landscaping, sidewalks, bus drop-offs and bio and retention ponds.

Valor Flagship Academy, Nashville, TN
This project is the first expansion of the newly-chartered Valor Flagship Academy. The project consists of a 19,363 square foot, one-story building addition to the existing school. The building is clad in insulated metal panels which provided a cost and energy-efficient skin to the building which allowed construction to happen at a rapid pace. The two major challenges on this project were time and space, both of which the school had very little of. The expansion used up almost all of the usable flat space on their property so staging construction materials as well as keeping the existing school operational were unique challenges.

LICENSES & TRAININGS

Insert Training Name
OSHA 30





Valor High School, Nashville, TN
D.F. Chase served as CM @ Risk for the new Valor High School project in Nashville, Tennessee. The 111,000 square foot facility was completed in August 2018. The facility ties on to the Valor Voyager Middle school completed in 2016 by D.F. Chase. The project repurposes a Lowe's store adding a complete internal second floor, and includes 46 classrooms, 6 labs, teacher offices, extensive break out areas, a full gym with locker rooms and an indoor elevated track, kitchen/server areas, and music rooms.



CHASE CONSTRUCTION GROUP
EMPLOYEE OWNED

SIMILAR PROJECTS- KIPP MIDDLE SCHOOL





D.F. Chase constructed a 49,095 square foot three-story middle school and gym for KIPP Nashville. The site work consists of clearing and grading approximately seven acres and providing a loop road with approximately 126 parking spaces, and dedicated car and bus drop-off areas with connecting sidewalks. The facility's educational spaces include 20 homerooms, 1 enrichment classroom, 4 SPED rooms, 3 counseling rooms, and 2 study/flex rooms and additional restrooms. The facility also includes a cafeteria for approximately 280 students and warming kitchen/ servery. Administrative areas include reception, main office, work room, Dean's office, and additional meeting spaces and restrooms. The facility is steel framed, with insulated metal panel (IMP) veneer – exposed on the inside, storefront windows, and a white TPO roof as well as large entrance canopies. The interior finishes include all painted drywall partitions, primarily acoustical ceilings with some exposed painted steel ceiling and drywall bulkheads where appropriate at ceiling transitions. Common areas have sealed concrete floors, classrooms have VCT flooring, and administrative areas have carpet flooring. There is rubber base throughout the school where appropriate. The gym is an exposed steel structure with wood athletic flooring, and two operable basketball goals.

- Budget $12,917,622
- Final Cost $13,645,553
- Delivered in 10 months

Changes included traffic signals & soccer field upgrades



SIMILAR PROJECTS
VALOR VOYGER MIDDLE SCHOOL
VALOR FLAGSHIP MIDDLE SCHOOL
VALOR HIGH SCHOOL

D.F. Chase converted a former Lowe's Home Improvement building, as part of a 3 part project including Valor Flagship A 26,000 SF addition, Valor Voyager a 40,000 square foot and a 111,000 sf High School. D.F. Chase demolished a portion of an existing Lowes' building to create a middle school and high school with a courtyard separating the two buildings. Installed a second floor within the existing building to create an additional 60,000 square foot middle school and high school. Also included are 55 classrooms, with science, SPED, offices, a library, a full size gym with 2 full cross court basketball courts and indoor running track, a full service cafeteria, outdoor play area with soccer, basketball, and four square playing courts.

- Flagship addition $2,640,980 Delivered in 6 months
- Voyager Middle School $6,130,792 Delivered in 8 months
- Valor High School $14,469,447 Delivered in 12 months
- Valor Flagship Storm Shelter $1,832,615 Delivered in 6 months



SIMILAR PROJECTS – KIPP ELEMENTARY SCHOOL



D.F. Chase served as CM @ Risk for the new KIPP Antioch College Prep Elementary School in Antioch, Tennessee. The 49,000 square foot facility was completed in July 2019. The facility is on a 22-acre site. The school consists of a two-story building with classrooms, administrative space, a lunch room with a warming kitchen, and a full gym with basketball courts and bleachers. The façade of the building consists of a steel structure with insulated metal panels and aluminum storefronts. There is a loop road with parking spaces, landscaping, sidewalks, bus drop-offs and bio and retention ponds.

- Budget $11,817,566
- Final Cost $12,577,484
- Delivered in 10 months

Changes included added restrooms in classes, added millwork in classes, added playfield and added landscaping. Returned $38,175 in savings to the Owner upon completion.

SIMILAR PROJECTS
ROCKETSHIP UNITED ACADEMY
ROCKETSHIP NASHVILLE
NORTHEAST ELEMENTARY

- The Rocketship Nashville Elementary project consists of a new ground-up 36,637 square foot K-4 Metro Nashville Charter School developed for Turner Impact, a National Charter School Funding Institution. The facility is a two-story traditional-use planned school, but the building has a very contemporary design and incorporates many recycled materials so it is very untraditional from that aspect. With a construction timeline of just six months from groundbreaking to move-in, construction of this project required a very tight schedule for the steel frame, insulated metal panel exterior, and an insulated precast concrete gymnasium to all come to life and make up the shell. The facility has a breakfast and lunch servery, learning labs, playgrounds, and both indoor and outdoor basketball courts. One very unique use of materials is the schools namesake "Rocketship" of which a huge picture of a rocketship is incorporated into the building's insulated wall panel system to make up this architectural feature. Budget $5.4M, project duration 6 months. Project finished $90k under the GMP.

- This is the second charter elementary school that Rocketship and Turner Impact Capital have brought to Nashville. Rocketship II consists of a 37,068 square foot facility that repurposed an existing office building and campus. This project called for 3,700 square feet of second floor slab and steel framing to be removed in order to create a new full-height gym space within the existing two-story building. The construction timeline for the project was just six months from receipt of the building permit to the grand opening. Due to the extensive effort of taking away the building's existing steel framing and reframing it from the inside, this project was split into multiple phases. This required excellent coordination from the project team. The Rocketship II project was delivered on time and under budget, and resulted in a wonderful facility for the charter school. Budget $4.6M, project duration 7 months, and finished $320K under the GMP.









SIMILAR PROJECTS – REPUBLIC HIGH SCHOOL
REPUBLIC 3RD FLOOR BUILD OUT

- The Republic High School project consists of a new three-story, 55,000 square foot addition that connects the existing campus buildings together. The facility has a contemporary design that incorporates steel-framed construction and an insulated metal panel exterior. The project site consists of a ring road that loops around the campus, 157 parking spaces, sidewalks, landscaping and bioswales. The facility has classrooms, staff offices and a servery for the student meals. Code compliance upgrades occurred in the existing building spaces and consist of fire alarm, HVAC, electrical, and plumbing upgrades. A courtyard encompasses the center of the campus for an ideal green space and outdoor learning experience. The project was $10.7M, took 12 months to complete and we returned $210k to the Owner.

- The 3rd floor build out was completed 2 years later was just under 18,000 sf, $1.1M and completed in 3 months.



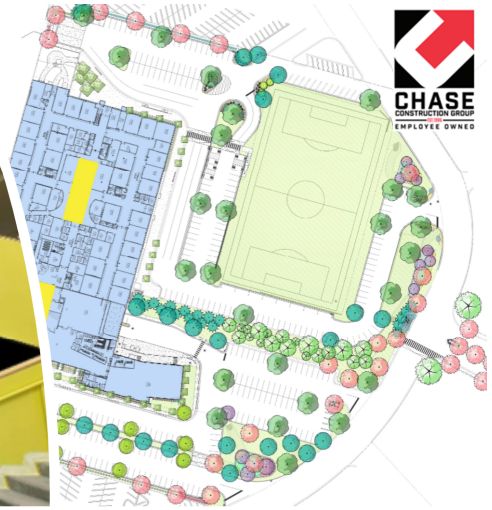




KIPP – GLOBAL HIGH SCHOOL

- The New KIPP High School was a large, adaptive design-build project that was converted from the “Old Macy’s” in the now repurposed Hickory Hollow Mall. Without any existing as-builts of the building, our team used a 3D scan to enable the extensive structural changes to move more quickly without the need to measure the building. The project was started in June 2023 and was completed for the August 2024 school year. The renovation was over 200,000 sf of space that included classrooms, science labs, a cafeteria, a gym with locker rooms and a new 8,000 SF storm shelter that is also utilized as a cafeteria space. A new high school soccer field was built in the existing parking lot for the school.
- Budget $44M, completed in 12 months.







Potential Facility Partner Profiles

Finance & Affordability

RAYMOND JAMES QUALIFICATIONS

JANUARY 5TH, 2026

Hanna Degen
Vice President – Public Finance / Debt
Investment Banking

30 Burton Hills Blvd, Suite 100
Nashville, TN 37215
(218) 851-9260
hanna.degen@raymondjames.com

RAYMOND JAMES

1. Raymond James Charter School Overview

Please include specific details about prior work with schools, charter schools, if applicable, and how your experience aligns with the type of facility planning and development these two schools will require.

Raymond James Financial, Inc. ("RJF"), founded 63 years ago in 1962, is a diversified holding company that provides financial services to individuals, corporations and municipalities through its subsidiary companies. Raymond James has grown into one of the largest financial services firms in the United States, achieving its ranking as a Fortune 500 company in July 2016. At Raymond James, Public Finance represents a core business, which is thriving at a national level. **Within our Public Finance department, we have a dedicated Charter School team that focuses solely on providing financing to charter schools across the country.**

Over the past two years, the Raymond James Charter School team has successfully executed **46 transactions** totaling almost **$1 billion** across **14 states**, supporting charter schools across the nation. Our experience spans a wide range of projects, from financing non-rated start-up schools to structuring transactions for investment-grade credits operated by seasoned charter management organizations. This breadth of experience allows us to tailor solutions for schools at every stage of growth.

In particular, our team has worked on **twelve start-up school projects since 2022**, which often require comprehensive facility planning and development strategies. These engagements have included securing financing for ground-up construction, renovations of existing buildings, and adaptive reuse of non-traditional spaces to meet educational specifications. We understand the unique challenges start-up schools face, such as limited operating history, enrollment projections, and compliance with state and local facility requirements. Our approach combines financial structuring expertise with a deep understanding of charter school facility needs, ensuring projects are delivered on time and within budget. Additionally, we utilize various capital sources for our start-up clients, including tax-exempt bonds, bank financing, and CDFI debt, often combined in multiple tranches of debt to optimize economics for our school clients.

Additionally, with the assigned lead banker based out of our Nashville office and two other team members residing in Tennessee, we bring a strong understanding of the state's charter school landscape, regulatory environment, and facility development considerations. This local presence enables us to provide informed guidance and tailored solutions that align with Tennessee-specific requirements and best practices.

2. Team Bios for the School

It would be helpful to include concrete examples of your work related to schools, facility planning, or similar projects, and why you are particularly well-suited to support these charter schools.

Public Finance Investment Banking		
Hanna Degen *Vice President* *t (612) 712-9967* hanna.degen@raymondjames.com	**Wes Olson** *Managing Director* *t (612) 482-5607* wes.olson@raymondjames.com	**Elliot Gorski** *Vice President* *t (901) 579-4421* elliot.gorski@raymondjames.com
High-Yield Credit Analyst		**Underwriting**
Richard Szalkowski *Managing Director* *Fixed Income Research* *t (212) 909-4053* richard.szalkowski@raymondjames.com	MUSIC CITY ACADEMY	**Parker Colvin** *Lead Underwriter* *t (949) 485-5905* parker.colvin@raymondjames.com

Investment Banking: **Hanna Degen** is a Vice President in Raymond James' National Charter School banking practice based out of the Nashville, TN office, and will be responsible for managing the day-to-day responsibilities for the Schools. She brings six years of experience in public finance, specializing in debt structuring, credit analysis, and deal execution for charter school financings. ***Over her career, she has completed more than 70 transactions totaling over $1 billion in par value for charter schools.*** Hanna holds Series 52, 53, 63, and 50 licenses. She earned a BA in Economics with a concentration in Finance from the College of St. Benedict in St. Joseph, MN. **Wes Olson** is a Managing Director in Raymond James' National Charter School banking practice and will provide support to the School. Over the course of his career, Mr. Olson has completed over 200 charter school financings totaling over $3

billion in par. **Elliot Gorski** will work alongside Ms. Degen and Mr. Olson supporting the Schools' needs. The team's duties will consist of developing a schedule of important milestones and meetings throughout the Schools' planning and development, coordinating with Raymond James' Dedicated Municipal Group during the marketing and sale of the bonds, providing advice on specific structuring questions, directing enhancement and credit rating strategies and completing any analyses desired by the Schools' financing team.

Sales and Trading: Working hand-in-hand with the investment bankers are the municipal underwriting, sales and trading personnel who will be responsible for pricing, marketing and distributing the bonds to investors. **Parker Colvin** is the Firm's lead Charter School Underwriter and will focus on the pricing and sale of the bonds, including marketing strategy. He is available as needed throughout the financing process to provide input on structuring and marketing issues. **Richard Szalkowski** will also serve as the credit analyst for the Schools', bringing 30 years of industry experience. Please see full resumes for the Raymond James Financing Team in ***Section 3***.

***Startup School Experience*:** The Banking Team understands the unique challenges facing Start Up schools and has a proven track record of assisting them off the ground utilizing a variety of financing sources. Section 3 highlights the start-up transactions our team has worked on (since 2022) and the transactions in progress. Below is a recent example of our work assisting one of our start-up charter school clients from the time they received their charter through the financial closing.

Alturas Academy North ("AAN")

- Charter school opening fall of 2026 in Rigby Idaho. AAN will be the third charter school in the Alturas network This K-8 startup will utilize an IB curriculum proven to consistently outperform local district outcomes. The Raymond James team worked with AAN to utilize a 3-tier capital stack consisting of a senior bank lender, the ID State Revolving Loan Fund, and philanthropic subordinate debt to structure a start-up financing which allows the school a runway for planned growth.
- Our team worked with AAN over a year in advance of closing to begin assessing affordability of the proposed project. We worked with the school team on their initial budget and established a debt capacity that they were able to bring to their project team ahead of any real estate being chosen or architect drawings being established. From there, we worked hand-in-hand with the project team along the entire process to ensure they stayed on budget. By working together early, our teams were able to ensure (1) the school had a facility they could afford, (2) timing of the real estate and financial closing aligned, and (3) the school was able to secure their long-term facility right away avoiding heavy leasehold improvement costs or large developer premiums.

Overview
- $16,575,000
- Approx. 4.61% blended interest rate 5 YR Term, 25 YR Amortization
- Draw Down

Credit Rating
- Non-Rated

Lenders
- **Senior Lender**: The Bank of Commerce
- **Subordinate Lender:** RLF and Building Hope

School Stats
- **Enrollment at Issuance:** 0
- **Stabilized Enrollment:** 600
- **DS as a % of Revenues:** 14.47%
- **Proforma MADS Coverage:** 1.49x

3. Company and Project Team Profile

Company Overview*:** Raymond James Financial, Inc. ("RJF"), founded 63 years ago in 1962, is a diversified holding company that provides financial services to individuals, corporations and municipalities through its subsidiary companies. Raymond James has grown into one of the largest financial services firms in the United States, achieving its ranking as a Fortune 500 company in July 2016. The Firm is listed on the New York Stock Exchange under the symbol "RJF", with a current market capitalization of approximately $30 billion, and was added to the S&P 500 Index in 2017. It has been a public company since 1983. Raymond James has had ***151 consecutive quarters of profitability dating back to 1987. The Firm currently manages approximately $1.73 trillion in client assets. Raymond James also carries **a strong commitment to the state of Tennessee**, with **271 office locations** across **67 cities**, employing **1,704 professionals**, including **346 retail brokers**. The Firm serves **217,344 retail accounts** in Tennessee, managing **$66.3 billion in assets**, underscoring its deep presence and dedication to supporting communities and clients throughout the state.

At Raymond James, Public Finance represents a core business, which is thriving at a national level. ***Raymond James organized its Public Finance department in 1986.*** Over the past 39 years, Raymond James has proven its commitment to the public finance arena by providing comprehensive underwriting and financial/municipal advisory services on hundreds of billions of dollars of municipal bond offerings nationwide. In 2025, Raymond James served as manager on **441 negotiated municipal issues** totaling more than **$26.8 billion in par amount**. This performance ranked us **#8 nationally by par value** and **#2 by number of transactions** in 2025, underscoring our continued leadership and commitment to the public finance market.

National Negotiated New Issues
As of December 31, 2025

Rank	Underwriter	Par Amt. (MM USD)	No. of Issues
1	BofA Securities	63,598	286
2	RBC Capital Markets	48,084	336
3	JP Morgan	43,311	189
4	Morgan Stanley	33,121	129
5	Jefferies	32,870	154
6	Wells Fargo	28,208	149
7	Goldman Sachs	27,860	66
8	**Raymond James**	**26,829**	**441**
9	Stifel	25,457	729
10	Barclays	20,808	88

Within our Public Finance, we have a dedicated charter school team of 6 bankers who combined, have completed over 250 transactions for charter schools totaling over $5B. In 2025, our team completed 25 transactions for over $580M in par value. This experience includes significant work supporting start up charter schools, highlighted below.

Start Up Financings Executed by Banking Team – Since 2022

- Tulsa Classical Academy (OK) – Series 2022
- AcadeMir Charter School of Osceola (FL) – Series 2022
- Gem Prep Twin Falls (ID) – Series 2022
- Elevate Academy East (ID) – Series 2023
- Vegas Vista Academy (NV) – Series 2024
- Capstone Academy Charter School Fort Myers (FL) – Series 2025
- Elevate Academy Twin Falls (ID) – Series 2025
- Alturas Academy North (ID) – Series 2025
- Gem Prep Idaho Falls (ID) – Series 2025
- AcadeMir High School West (FL) – Series 2025
- SSS Academy (AZ) – Series 2025
- Harrisburg Global Academy (SC) – Series 2025

Start Up Financings In Progress

- Elevate Academy Kuna (ID)
- Founder's Grove Classical Academy (MI)
- Founder's Classical Academy (NV)
- Team Success: Lee County (FL)
- Red Barn School (IA)
- Charter School Partners (FL) – Various Locations
- Brabeion Academy (ID)

Of these transactions, 7 were bond financings, 3 were bank placements and 2 were CDFI placements. This variety represents our no-one-size fits all approach and highlights our experience sourcing multiple different financing options to ensure the best outcome for the school.

***Our Process*:**

With this depth of experience, we have developed a proven process to guide start-up charter schools through every step of securing funding. We partner with you from the initial budget planning phase all the way to post-closing support. While every school's circumstances are unique, our typical financing process for start-up charter schools involves three key phases:

- **Planning & Initial Budgeting:** We begin by reviewing your school's initial projections for enrollment and finances. Using these projections, we help you determine a realistic total project cost for your facility needs. Our team then helps articulate this budget to your broader project team (for example, school leadership, architects, and developers) to ensure everyone understands the financial parameters. Along the way, we identify any areas within your plan that might need adjustment or cost-saving measures to keep the project financially viable from the start. This early planning and budgeting phase ensures a strong foundation for the financing process.

- **Financing Process:** Next, we assemble a comprehensive investor package that highlights your school's mission, academic program, and project details, as well as the financial projections. We distribute this package to a broad network of potential financing partners, including banks, Community Development Financial Institutions (CDFIs), and bond investors, soliciting proposals from each. By reaching out to multiple funding sources, we leave no stone unturned in exploring all viable financing options for your project. We then help

you evaluate the proposals and select the lending partner that best fits your needs and goals, whether it's a bank loan, CDFI financing, or a bond issuance with investors.

Once a lender or financing option is selected, our team takes the lead in coordinating the financing process through closing. We work closely with the chosen lender (and with your legal counsel and project consultants as needed) to finalize terms, complete due diligence, and fulfill all requirements for a smooth closing. Throughout this phase, we remain actively involved in project meetings to keep the financing on track and the budget on target. Our hands-on approach ensures there are no last-minute surprises – the financing timeline aligns seamlessly with your construction or opening schedule, and all necessary documentation and approvals are in place for a successful closing.

- **Post-Financing Support:** Even after your financing has closed, our support does not end. The Raymond James team remains available as a long-term resource for your school. We are here to answer questions, provide guidance, and assist with any ongoing lender or investor requirements – for example, helping with compliance reports, financial covenants, or other post-closing obligations. Because start-up schools continue to evolve, we also stand ready to advise on future financing needs as your school grows. Whether you are considering an expansion, securing additional facilities, or refinancing existing debt down the line, we will help you evaluate the long-term options available. Our goal is to be a trusted financial partner to your charter school well beyond the initial financing, supporting your journey every step of the way.

In summary, Raymond James offers a full-service, cradle-to-grave financing partnership for start-up charter schools. From the first stages of budgeting and planning to securing the best financing and providing ongoing support, we guide you through the complex process of charter school financing with expertise and dedication. This three-phase approach ensures that your school's project stays on solid financial footing and that you have a reliable partner through planning, execution, and future growth.

Team Resumes: Spanning multiple states, the Raymond James Charter School Team serves as a trusted partner to educational leaders nationwide, offering deep expertise and unwavering support to those shaping the future of education. Based in Nashville, Hanna Degen will be the lead point of contact for the School. Hanna brings a wealth of experience supporting charter schools across the country. Detailed resumes of our team members are provided below.

Hanna Degen joined Raymond James in 2023 with a focus on deal execution, debt structuring and credit analysis, exclusively in the charter school sector. Prior to joining Raymond James, Hanna worked at Piper Sandler, where she assisted charter schools with their financing needs. She has completed over 70 transactions – totaling more than $1B in par value for charter school clients. Hanna received a bachelor's degree in economics from the College of Saint Benedict and holds Series 50, Series 52, Series 53, and Series 63 professional licenses. **She is based out of the Nashville, TN office.**

Wes Olson joined Raymond James in October 2023 after more than 12 years in the municipal finance industry, with a primary focus on education and charter school finance. Wes is responsible for business development and managing debt transactions for clients nationally, including tax-exempt bonds, bank placements, CDFIs, and USDA financings. In his career, Wes has completed over 250 transactions totaling over $4.7 billion in par since 2011, including over 200 charter school financings in 22 states. Wes received a bachelor's degree in mathematics and economics with concentrations in finance and statistics from St. Olaf College. Wes holds Series 52, Series 53, and Series 63 professional licenses.

Elliot Gorski is an Associate at Raymond James Memphis office. He joined the team in July of 2020 and provides support nationally on Charter School and Healthcare financings as well as K-12 Illinois and Michigan local issuer financing deals. A member of Raymond James' Public Finance Quantitative Group, he has cooperated with team members across the country providing analytical support to the banking and local issuers. Elliot graduated Magna Cum Laude from Rhodes College in Memphis, TN where he played lacrosse and earned Bachelor's degrees both in Economics and Business Administration. Mr. Gorski holds the Series 50, 52, and 63 licenses.

Parker Colvin joined Raymond James in 2013 as a senior underwriter focused on the California, Midwest, and Charter School markets and was promoted to Head of Negotiated Underwriting in 2019. He also serves on the firm's Commitment Committee. Prior to Raymond James, Parker managed the California/Arizona underwriting desk for Stifel and served as Head of Trading and Underwriting for Stone & Youngberg before those firms combined. In his 24 year career, Parker has had many trading and management roles and has underwritten more than 2,700

transactions with a par value of over $51 billion as sole or lead manager. Parker's experience includes significant work with school district and land-secured credits. In the Midwest, Parker has priced over 200 bond transactions with a par value of $3.1 billion in Illinois, Indiana and Michigan. His land-secured experience includes over 500 issues with a par value of $7.4 billion across 12 states. Parker's work with school districts has included over 1,600 transactions totaling over $26 billion in par value. Born and raised on the Iron Range of Minnesota, Parker earned a B.S. in Mathematics and played ice hockey at Wheaton College (IL). He currently holds Series 7, 24, 53 and 63 licenses.

Richard Szalkowski joined Raymond James in September of 2008. His responsibilities include credit research on privatized student housing, hospitals, health systems, corporate-backed transactions, utilities, charter schools and California land-secured deals. Prior to joining Raymond James, Mr. Szalkowski worked at UBS Investment Bank for eight years. His responsibilities included credit analysis on investment-grade and high-yield municipal issuers with a primary focus on healthcare, long-term care, housing, land secured, higher-education, tobacco, and industrial development bonds. During 2005 to 2007, Mr. Szalkowski was a municipal high-yield trader covering traditional high-yield issues as well as 'A' or lower healthcare and corporate backed issuers. From 2000 to 2005, Mr. Szalkowski was a research analyst in the Municipal Research Group, specializing on healthcare, long-term care, housing, land secured, and industrial development bonds. Prior to joining UBS, Mr. Szalkowski worked at Fitch Ratings in the Healthcare and Higher-Education group from 1998 to 2000. His responsibilities included analyzing and rating hospital, long-term care and higher-education new issue transactions. Prior to working at Fitch Ratings, Mr. Szalkowski worked at Moody's Investors Service in the Healthcare Ratings Group from 1994 to 1997. From 1997 to 1998, he provided qualitative and quantitative credit analysis used in the assignment of credit ratings on hospital and health systems. Mr. Szalkowski received a Bachelor of Science in Finance from Rider University. He is currently licensed with Series 7, 16, and 63.

DISCLAIMER

The information contained herein is solely intended to facilitate discussion of potentially applicable financing applications and is not intended to be a specific buy/sell recommendation, nor is it an official confirmation of terms. Any terms discussed herein are preliminary until confirmed in a definitive written agreement. While we believe that the outlined financial structure or marketing strategy is the best approach under the current market conditions, the market conditions at the time any proposed transaction is structured or sold may be different, which may require a different approach.

The analysis or information presented herein is based upon hypothetical projections and/or past performance that have certain limitations. No representation is made that it is accurate or complete or that any results indicated will be achieved. In no way is past performance indicative of future results. Changes to any prices, levels, or assumptions contained herein may have a material impact on results. Any estimates or assumptions contained herein represent our best judgment as of the date indicated and are subject to change without notice. Examples are merely representative and are not meant to be all-inclusive.

Raymond James shall have no liability, contingent or otherwise, to the recipient hereof or to any third party, or any responsibility whatsoever, for the accuracy, correctness, timeliness, reliability or completeness of the data or formulae provided herein or for the performance of or any other aspect of the materials, structures and strategies presented herein. Raymond James is neither acting as your financial advisor nor Municipal Advisor (as defined in Section 15B of the Exchange Act of 1934, as amended), and expressly disclaims any fiduciary duty to you in connection with the subject matter of this Proposal.

Municipal Securities Rulemaking Board ("MSRB") Rule G-17 requires that we make the following disclosure to you at the earliest stages of our relationship, as underwriter, with respect to an issue of municipal securities: the underwriter's primary role is to purchase securities with a view to distribution in an arm's-length commercial transaction with the issuer and it has financial and other interests that differ from those of the issuer.

Raymond James does not provide accounting, tax or legal advice; however, you should be aware that any proposed transaction could have accounting, tax, legal or other implications that should be discussed with your advisors and/or legal counsel.

Raymond James and affiliates, and officers, directors and employees thereof, including individuals who may be involved in the preparation or presentation of this material, may from time to time have positions in, and buy or sell, the securities, derivatives (including options) or other financial products of entities mentioned herein. In addition, Raymond James or affiliates thereof may have served as an underwriter or placement agent with respect to a public or private offering of securities by one or more of the entities referenced herein.

This Proposal is not a binding commitment, obligation, or undertaking of Raymond James. No obligation or liability with respect to any issuance or purchase of any Bonds or other securities described herein shall exist, nor shall any representations be deemed made, nor any reliance on any communications regarding the subject matter hereof be reasonable or justified unless and until (1) all necessary Raymond James, rating agency or other third party approvals, as applicable, shall have been obtained, including, without limitation, any required Raymond James senior management and credit committee approvals, (2) all of the terms and conditions of the documents pertaining to the subject transaction are agreed to by the parties thereto as evidenced by the execution and delivery of all such documents by all such parties, and (3) all conditions hereafter established by Raymond James for closing of the transaction have been satisfied in our sole discretion. Until execution and delivery of all such definitive agreements, all parties shall have the absolute right to amend this Proposal and/or terminate all negotiations for any reason without liability therefor.

Potential Facility Partner Profiles

Legal Counsel



Will D. Pugh

P (615) 742-4575
F (615) 742-4539
wpugh@srvhlaw.com

Combining a pragmatic approach with extensive legal knowledge, Will Pugh provides tailored representation to businesses on a wide range of matters. He has substantial experience assisting clients with complex commercial real estate transactions, mergers and acquisitions, and corporate governance, operational, and transactional issues.

In his real estate practice, Will has represented buyers, sellers, and investors in acquisitions, dispositions, financing, development, and other commercial property transactions, playing an instrumental role in closing deals that range in value from $500,000 to more than $50,000,000. He has worked extensively on commercial leasing matters, representing landlords and tenants in drafting and negotiating leases for office, retail, and industrial properties, as well as representing landlords in lease disputes and litigation.

Businesses, from start-ups to well-established companies, turn to Will for his counsel and assistance on the full range of legal issues and challenges they face, including drafting form agreements, restrictive covenants and non-competes, supply agreements, and confidentiality agreements. He works with entrepreneurs and early-stage companies on business formation and capitalization, including the drafting and negotiation of formation documents, operating agreements, subscription agreements, employee stock options, and stock appreciation rights plans.

A seasoned transactional lawyer, Will represents strategic buyers, private equity companies, and sellers in mergers, acquisitions, joint ventures, and other strategic partnerships in a broad spectrum of industries, including eCommerce, food distribution, manufacturing, commercial printing, business services, healthcare, insurance, and non-profits. The deals he has helped close range in value from $500,000 to $300,000,000.

Will also works with developers and licensees in connection with software development and license agreements in various industries such as eCommerce, construction, logistics, healthcare, and general software development.

A *summa cum laude* graduate of Wheaton College in Chicago, Will earned his law degree from Vanderbilt University Law School, where he received the Robert F. Jackson Memorial Prize for having the highest GPA in his class after two years of law school and was a member of the *Order of the Coif*.

Before attending law school, Will served as the Director of Strategy for **atlasRFIDstore.com**, an eCommerce start-up located in Birmingham, Alabama. During his tenure, the company grew from a small start-up into a thriving business with more than 20 employees.

After law school, Will clerked for the Honorable Vice Chancellor Joseph R. Slights III on the Delaware Court of Chancery, where he regularly worked on litigation matters involving some of the country's largest companies. Will leverages this experience to provide guidance on directors' and officers' fiduciary duties, and he consults on litigation matters involving fiduciary duty issues, including book and records demands.

Education

- Vanderbilt University Law School, J.D.
  - Member, *Order of the Coif*
  - Robert F. Jackson Memorial Prize
- Wheaton College, B.A., *summa cum laude*

Admissions

- Tennessee

Recognition

- *Best Lawyers in America*® "Ones to Watch," Banking and Finance Law (2026); Commercial Litigation (2023 – 2026); Corporate Law (2023 – 2026); Mergers and Acquisitions Law (2026); Real Estate Law (2026)
- Tennessee Bar Association Harris Gilbert Pro Bono Attorneys of the Year Award (2025)

Publications

- Will Pugh and Lindsay Dial, "**Recent CTA Development to Watch**," Sherrard Roe Blog (March 5, 2024)
- Will Pugh and Lindsay Dial, "**The Corporate Transparency Act: Your Obligations**," Sherrard Roe Blog (December 19, 2023)
- Will Pugh, "**The Corporate Transparency Act's Final Rule: Who Qualifies as a Beneficial Owner What Information Must Be Disclosed**," Sherrard Roe Blog (March 7, 2023)
- Will Pugh, "**Issuance of Corporate Transparency Act's Final Rule Starts Compliance Clock Ticking for 32 Million Businesses**," Sherrard Roe Blog (December 12, 2022)
- Will Pugh, "**The Corporate Transparency Act: Why You May Be Required to Share Your Personal Information With The Federal Government**," Sherrard Roe Blog (June 21, 2022)
- Will Pugh, "**How Well are Sellers Protected from Post-Closing Claims?**" Sherrard Roe Blog (December 9, 2020)
- Will Pugh, "**Four Types of Risk Addressed by MAE Clauses, and Where COVID-19 Fits—Lessons from the Delaware Court of Chancery**," Sherrard Roe Blog (December 3, 2020)
- "**Why Not Appoint an Algorithm to Your Corporate Board**," Slate (Mar. 24, 2019)
- **Getting What You Bargained for: Avoiding Legal Uncertainty in Survival Clauses for a Seller's Representations and Warranties in M&A Purchase Agreements**, 12 *J. Bus. Entrepreneurship & L.* 1 (2019)
- Co-Author with Robert S. Reder, **Delaware Supreme Court Bars Buyer From Using Narrowly "Cabined" Working Capital Adjustment**, 72 *Vand. L. Rev. En Banc* 19 (2018)



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Thomas Hall concentrates his practice on construction litigation and arbitration, representing owners, general contractors, design professionals, subcontractors, and suppliers on a variety of commercial and residential construction projects. Drawing on his deep knowledge of Tennessee's construction laws, he advises clients on contract negotiations and regulatory compliance. He also prosecutes and defends clients in a range of disputes, including those involving construction defects, warranty claims, liens, and project delays and disruptions. A Fellow of the Construction Lawyers Society of America, Thomas also serves on the Board of Directors for the Greater Tennessee Chapter of the Associated Builders and Contractors and on the executive committees of both the Tennessee Association of Construction Counsel and the Tennessee Bar Association's Construction Law Section.

Before joining the firm, Thomas represented clients in complex construction litigation matters at a prominent construction law firm in Nashville. During law school, he served as a Judicial Extern and Judicial Intern for The Honorable Jennifer H. Henderson of the U.S. Bankruptcy Court for the Northern District of Alabama. He was also a Judicial Intern for The Honorable L. Scott Coogler of the U.S. District Court for the Northern District of Alabama and was elected President of the School of Law's chapter of the American Constitution Society.

Thomas earned his Juris Doctor, Master of Business Administration, and Master of Laws in Taxation *magna cum laude* from the University of Alabama School of Law. He received his Bachelor of Arts degree from Sewanee, where he graduated *cum laude*.

In his free time, Thomas enjoys being with his family, providing pro bono legal services and attending high school football games at his alma mater, Franklin High School.

Education

- The University of Alabama School of Law, J.D., M.B.A., LL.M. in Taxation, *magna cum laude*
  - Henry H. Hutchison Federal Tax Clinic Scholarship Award Recipient
- Sewanee, The University of the South, B.A., *cum laude*
  - General Assembly Merit Scholarship and Lear Scholarship Recipient

Admissions

- Alabama
- Kentucky
- Tennessee
- U.S. District Court, Eastern District of Kentucky
- U.S. District Court, Eastern District of Tennessee
- U.S. District Court, Middle District of Tennessee
- U.S. District Court, Western District of Kentucky

Recognition

- *Best Lawyers in America*® "One to Watch," Commercial Litigation; Construction Law (2023 – 2026)
- Fellow, Construction Lawyers Society of America
- Tennessee Supreme Court Attorneys for Justice Pro Bono Honor Roll (2019 – 2025)

Speaking Engagements

- Presenter, "Contract Language – What the Pandemic Has Changed," Construction Financial Management Association Southeastern Construction Regional Conference (August 2021)
- Presenter "Updates to Tennessee Construction Law," Construction Financial Management Association, Middle Tennessee Chapter (April 2021)
- Presenter, "Construction Case Law Update," Tennessee Association of Construction Counsel (November 2020)

Professional Activities

- Member, Construction Law Forum, American Bar Association
- Member, Construction Law, Litigation, and Real Estate Law Sections, Tennessee Bar Association
- Member, Emerging Leaders, Greater Tennessee Chapter of Associated Builders and Contractors
- Member, Legal Committee, Greater Tennessee Chapter of Associated Builders and Contractors
- Member, Legislative Committee, Greater Tennessee Chapter of Associated Builders and Contractors
- Member, Federal Practice Section, Nashville Bar Association
- Member, Tennessee Association of Construction Counsel
- Member, Young Lawyers Division, American Bar Association
- Member, Young Lawyers Division, Nashville Bar Association

Attachments 1.2 D
Vertex Education (Formerly EdTec)
Memorandum of Understanding (MOUs)
Evidence of Community Engagement

EdTec Budget Development & Pre-Launch Back Office Services Proposal for The Gate School

EdTec is pleased to present this proposal for Budget Development and Pre-Launch Back Office Services to support the founding of the proposed charter school led by Burrus Cox. Our team brings deep expertise in charter school finance, operations, and compliance. We specialize in helping new school developers build a strong financial foundation from the pre-approval phase through school launch and operation.

Scope of Work – Budget Development

As discussed with Mr. Cox, EdTec will support the development of a comprehensive, multi-year budget and application materials aligned with Tennessee authorizer requirements. Our budget development engagement includes:

- Consultation with the school developer regarding the multi-year school budget and key budget planning issues
- Review and/or development of a multi-year school budget in a standardized format, including all government revenues
- Development of detailed cash-flow projections
- Assistance in the development of the budget narrative section of the charter school application

These services will incorporate benchmarking and assumptions based on comparable Nashville charter and traditional schools, as discussed during our consultation.

Scope of Work – Pre-Launch Back Office Services

Following budget development and pending charter approval, EdTec will transition to Pre-Launch Back Office Services. During this phase, we provide critical setup and light accounting support to ensure planning year financial compliance and prepare for school operations, including:

- Accounting system and chart of accounts setup
- Payroll and vendor management readiness
- Grant accounting (CSP) setup and compliance support
- Cash-flow management and financial reporting setup
- Board governance and financial compliance preparation
- Planning year transaction processing

This pre-launch engagement ensures that financial, operational, and governance systems are established and tested well before the first day of school. Additionally, we help ensure that planning year financial compliance is accomplished according to best practices and satisfies financial audit requirements.

Pricing, Deliverables & Partnership

Pricing & Term

Budget Development Engagement

The fee for this engagement (**$3,500 value**) will be waived upon the school's commitment to sign a Pre-Launch Back Office Services Agreement with EdTec.

Pre-Launch Back Office Services

$2,500 per month, commencing upon charter approval, for the period of October 1, 2026, through June 30, 2027, preceding the school's opening year.

Deliverables & Timeline

- Multi-year budget and cash flow projections delivered by **January 16, 2026**.
- Budget narrative and application support completed by the application submission deadlines.
- Pre-Launch onboarding will occur within 30-60 days of charter application approval, ensuring sufficient time to establish systems, assign the client management team, and prepare for financial operations setup prior to launch.

Team & Support Model

Your school will be supported by an assigned EdTec School Finance Manager, who will be backed by assigned accounting and payroll specialists, and overseen by senior leadership. This team-based model ensures timely communication, expert financial oversight, and consistency throughout the pre-launch and operational phases.

Conclusion & Next Steps

EdTec is committed to partnering with your founding team to build a strong fiscal and operational foundation for your new school. We look forward to supporting your vision and demonstrating the value of our services as your trusted back-office partner. Upon acceptance of this proposal, EdTec will prepare a Master Services Agreement, a Budget Development Statement of Work, and a Pre-Launch Services Statement of Work for execution.

> **Sincerely,**
>
> Terence Washington
> EdTec LLC
> twashington@edtec.com | www.edtec.com

The Gate School – Financial Policies and Procedures

Financial Policies and Procedures

THE GATE SCHOOL

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I. INTRODUCTION AND PURPOSE

The Board of Directors will review and adopt the following financial policies and procedures to ensure the most effective use of the public and private funds to support its mission and to ensure that the funds are budgeted, accounted for, expensed, and maintained appropriately. It is the intent of these policies and procedures to implement both the letter and spirit of all applicable local, state, and federal rules and regulations regarding the expenditure of and accounting for public funds.

Collectively, they comprise a set of internal controls to ensure effective, efficient operations, a segregation of duties and responsibilities, reliability of financial reporting, legal and regulatory compliance, and risk mitigation. As The Gate School ("TGS") grows and guidance changes, these policies and procedures will be reviewed and updated on, at least, an annual basis.

II. ACCOUNTING

a. Fiscal Year

The fiscal year is July 1 through June 30.

b. GAAP

The accounting procedures shall conform to Generally Accepted Accounting Principles (GAAP) to ensure accuracy of information and compliance with external standards.

c. Accounting Basis

TGS uses the accrual-basis of accounting at year-end, meaning that revenues are recognized in the fiscal year they are earned, and expenses are recognized in the fiscal year that the liability is incurred. This is regardless of when the receipt or payment of cash takes place.

Throughout the year, revenues will also be recognized as they are earned and when contributions are received or awarded in accordance with GAAP.

State and local per-pupil payments will be recognized in the appropriate month with any early payments for a future month deferred and recognized in the appropriate month. A final adjustment will be posted based on an annual reconciliation of average enrollment for the fiscal year.

Cost reimbursement grants such as CSP, Title I, and Title II will be recognized when those funds are earned when eligible expenses are made. Additional considerations are separately enumerated under "Section XV. Federal Grant Compliance."

d. Restricted Grant Tracking

TGS shall maintain its general ledger using unique restricted fund codes for the purposes of tracking restricted revenues and expenses. This is with the specific intention to prevent the double-counting of expenses against restricted revenue sources.

e. Capitalization and Depreciation

TGS will capitalize and depreciate annually all assets of $5,000 or more to coincide with federal fund guidance on capitalization threshold.

All assets purchased with an individual value less than $5,000, but purchased in bulk and exceed $5,000 in bulk, will be considered as meeting the capitalization threshold. All other assets will be charged annually to an expense in the year incurred. Capitalized assets are recorded at cost and depreciated under the straight-line method over their estimated useful lives which can range from:

1. Leaseholder improvements: Lease term or 10 years, whichever is shorter
2. Facility purchases: 30 years
3. Building and site improvements: 30 years

4. Computers and associated technology: 3 years
5. Furniture & equipment: 5 years

Repair and maintenance costs, which do not extend the useful lives of an asset, are recognized as expenses.

Throughout the year, items will be recognized as expenses. They will be reviewed at year-end for possible capitalization and depreciation. Depreciation will be calculated from when the item was purchased and will be treated as placed in service at that time unless otherwise specified.

Items will be tagged when placed in service by the Operational Partner.

As part of the annual close, the Operational Partner will conduct an inventory of all assets, noting condition and location.

Assets sold, retired, lost, or stolen and related amounts of accumulated depreciation will be eliminated from the asset accounts, and any resulting gain or loss will be recognized within that year.

Nothing in this practice is to prevent TGS from maintaining an estimated impact of capitalization and depreciation on operating income and fund balance for the year on interim financial statements.

f. Bank Reconciliations

A reconciliation of all bank accounts, whether checking or savings accounts, will be performed monthly by a staff accountant or back-office provider's accountant.

If TGS contracts with a back-office provider, TGS will provide the back-office provider with either online access or paper copies of the monthly statements no later than the 5th business day of the following month.

If TGS contracts with a back-office provider, the back-office provider will maintain banking reconciliation documentation for the annual audit.

Uncleared checks older than six months will be reviewed for reissuance, voiding, or escheatment proceedings.

The Executive Partner and Operational Partner will be responsible for reviewing bank reconciliations and determining if financial irregularities exist. Financial irregularities discovered during the banking reconciliation process will be brought to the attention of the Board Finance Committee.

g. Financial Record Retention and Destruction

All financial records will be retained for no less than 7 years. Records include, but are not limited to, transaction ledgers, bank statements, cancelled and voided checks, payroll records, audits, and tax filings.

TGS's back-office provider shall be considered the custodian of financial records for the purposes of tax Form 990 and financial audit. At termination of the relationship, the back-office provider will transfer all

financial records to TGS. Nothing in this section is to preclude, dissuade, or absolve TGS from maintaining its own set of financial records.

After 7 years, TGS may evaluate its documents for secure destruction or alternatively, archival.

Retaining electronic or digital copies of records will be considered compliant with this file retention policy.

Nothing in this section will be considered to supersede the organization's broader record retention and destruction policies.

III. FISCAL MANAGEMENT

a. Site-Based Management

To effectively serve students, TGS's board of directors affirms that the decisions that affect the operation of TGS should be made at the school level to the maximum extent permitted by board policies.

It is the intent of the board to encourage and facilitate the implementation of site-based management, based on the following requirements:

- All site-based management plans must be submitted to the Executive Partner for approval or disapproval.
- All such plans must be reviewed and evaluated by the Executive Partner on an ongoing basis.
- Any such effort must be solely for the purpose of increasing the efficiency and effectiveness of the delivery of educational services to the current and future students at TGS.
- Nothing contained in any site-based management plan may adversely affect the legal status of TGS as an LEA in accordance with all legal requirements.
- Any such plan may not lessen the responsibility, accountability, or authority of the Executive Partner for the educational results at that school.

Nothing in this policy will have the effect of authorizing or permitting (a) any delegation of authority or responsibility for decision-making to any person other than duly appointed school officials or (b) any contracts with private entities to provide educational services unless specifically approved by the board.

b. PTA and Other Support Group Funds

PTA and other support group funds are not to be maintained by TGS.

No school employee may hold a financial office in the PTA or have any financial responsibilities related to the PTA in TGS in which he/she is employed. This includes check-signing authority. The same applies to the handling of funds of other school support groups such as booster clubs.

When money is collected for fundraisers sponsored by various support groups such as the PTA and booster clubs, parent representatives from the respective organizations must be present to collect money on behalf of the organization.

Any PTA or other support group that uses the name of TGS will be required to prepare and make available in an appropriate way (to be determined as necessary by the Executive Partner) a summary of its receipts and disbursements, no less frequently than once per semester.

c. Responsibility and Accountability

In exercising their responsibility in the handling of school funds, school employees should be actively aware that violation of the provisions of these policies will render the employee subject to disciplinary measures up to and including termination and prosecution as provided in the applicable provisions of local and state law.

IV. BANKING

a. Checking Account

The Board shall authorize the establishment of a non-speculative commercial checking account with a federally insured banking institution for the purposes of school operations. The bank must also participate in the Tennessee Public Funds Collateral Pool.

The established checking account shall be the primary account for school financial obligations, as well as the primary account for deposit and receipt of all funds. Authorized signatories to this account shall be the [ADD AUTHORIZED SIGNATORIES - e.g., Executive Partner, Board Treasurer, Board Chair].

1. Checks under $5,000 will require the signature of the [e.g., Executive Partner or Board Treasurer or Board Chair, with the Executive Partner as the primary signer].
2. Checks of $5,000 or more will require the signature of the [e.g., Executive Partner AND either the Board Treasurer or Board Chair].
3. Checks payable to the Executive Partner must be signed by the Board Treasurer. Checks payable to the Executive Partner of $5,000 or more will require the signature of the Board Chair and the Board Treasurer.

Under no circumstances should the recipient of a check also be a signatory on his or her own check.

No additional checking accounts shall be established without board approval. The only bank accounts other than TGS Miscellaneous and Cafeteria Accounts that are authorized to be opened and to include TGS's name are accounts in the name of a Parent Teacher Association (PTA) or a courtesy fund in the name of a departmental unit.

Board approval is also required to close a checking account.

b. Savings Account

The Board may authorize the establishment of a non-speculative, savings account with a federally insured banking institution that also participates in the Tennessee Public Funds Collateral Pool.

An account bearing interest will not be considered speculative.

Checks will not be written out of the savings account, and any transfer of funds to or from the savings account to the general checking account will be done in consultation with the Board Treasurer and will take the most current cash forecast into account.

No additional savings accounts shall be established without board approval.

Board approval is also required to close a savings account.

c. Depository Insurance and Collateralization of Funds

As a public charter school operating as a local education agency in the State of Tennessee, TGS's public funds are subject to statutory requirements governing the safeguarding of governmental deposits.

FDIC Insurance

Funds deposited by TGS are eligible for coverage by the Federal Deposit Insurance Corporation (FDIC) up to the applicable insurance limits. However, because TGS routinely maintains balances in excess of FDIC limits, FDIC insurance alone is not sufficient to fully protect public funds.

Tennessee Public Funds Collateral Pool

To ensure full protection of public funds, TGS shall maintain its primary depository accounts only with financial institutions that participate in the Tennessee Public Funds Collateral Pool (the "Collateral Pool"), as authorized under Tennessee law.

Depository Requirements

Accordingly:

- TGS shall use only financial institutions that are eligible public depositories and active participants in the Tennessee Public Funds Collateral Pool for the deposit of operating and reserve funds.
- Management shall periodically verify TGS's depository institution's continued participation in the Collateral Pool.
- TGS shall not maintain material balances of public funds in institutions that do not provide collateralization protections consistent with Tennessee law.

Oversight and Risk Management

The governing board retains responsibility for ensuring that TGS's banking relationships adequately safeguard public funds. Selection of depository institutions shall consider safety, statutory compliance, internal control considerations, and operational needs.

d. Petty Cash Fund

The Executive Partner may authorize the establishment of a petty cash fund of up to $1,000 to be maintained by the Operational Partner on TGS site in a locked, secure location.

Initial funding of the petty cash fund should be done as a check from TGS's primary checking account.

The petty cash fund is maintained by the Operational Partner. All requests for petty cash must be made in advance and approved by the Executive Partner.

The Operational Partner records the disbursement in a log and maintains a copy of the approval.

Any unused funds along with all receipts for items purchased must be returned to the Operational Partner.

Monthly, the log and transactions will be reconciled by the Operational Partner and will be submitted to the back-office provider for entry into the accounting system.

Upon request by the Executive Partner and subject to supporting documentation, funds from the school's primary checking account may be used to replenish the petty cash fund up to $1,000.

e. Deposits of Receipts

TGS will deposit all public funds within three (3) business days following receipt. In line with the following guidelines:

1. Front office staff will open all mail daily, immediately sort and log all checks or money orders and forward them to the Operational Partner. Any bank checks or money orders received in person will also be given to the Operational Partner for logging. In the absence of the Operational Partner, the Executive Partner will fulfill the responsibilities of ensuring mail is processed.
2. Cash payments, whether for student activities, donations, or other purposes, will be strongly discouraged. TGS will invest in a reputable point-of-sale system (e.g., Square, Clover, etc.) to accept electronic payments and donations. All cash payments will be processed and tracked through the point-of-sale system with all individuals receiving receipts for purchases and donations. The Operational Partner, with the front office staff, will review the cash report each week and affirm that the total collected matches the supporting documentation.
3. Checks and cash waiting to be deposited will be stored in a secure location such as a locked deposit box or cash register accessible only by authorized staff.
4. The Operational Partner or Executive Partner will restrictively endorse ("For Deposit Only") non-public checks or money orders to the checking account and deposit them, along with any cash collections as soon as practicable, at least weekly. The Operational Partner will log all

deposits with details of what was included and compile associated backup (check images, deposit receipt, etc.) to keep on file or forward to the back-office provider.

V. PURCHASES AND EXPENDITURES

a. Authorization of Expenditures

All purchases of goods and services shall be consistent with the most recent board-approved budget.

These expenditures shall not require additional board approval, except for contracts for professional services that will exceed or are likely to exceed a total annual amount greater than $25,000, or if the term will go past one year.

Otherwise, all expenditures must be approved by the Executive Partner or the Operational Partner, who will review each proposed expenditure to determine whether it aligns with the board-approved budget.

Nothing in this section shall prevent the Executive Partner from making an assessment to rebalance individual line items within the approved budget, provided the adjustments do not otherwise jeopardize the financial health of TGS or disrupt TGS's educational program. Adjustments greater than $25,000 or that otherwise will decrease projected operating income by more than 2% should be discussed with the Board Treasurer.

b. Contracts and Bidding

All professional services shall be provided for under a contract. Only the Executive Partner will sign any such contract.

The Executive Partner can execute single year contracts for professional services that will not exceed or are not likely to exceed $25,000. For contracts for professional services that will exceed or are likely to exceed a total annual amount greater than $25,000, or the term will extend for a period greater than one year, board approval will be required prior to execution. Length of contracts shall be at the discretion of the Board in consultation with the Executive Partner, and multi-year contracts shall not be prohibited.

Should a contract require board approval per the above, but timing or other circumstances require execution prior to being approved at a board meeting, the Executive Partner, with the approval of both the Board Chair and Board Treasurer, may conditionally execute said contract. The contract will need to then be formally approved at the next board meeting.

Should an existing contract exceed the stated ceiling or length of the contract, board approval is required.

Unless otherwise expressly required by local or state law, or by conditions of a funding source such as the National School Lunch Program or the Charter Schools Program or any other state or federally funded program, TGS shall not be required to conduct a formal bid process for contracted services and goods. However, the Executive Partner or the Operational Partner shall make good faith efforts to secure

at least three (3) quotes and proposals to ensure a prudent, cost-effective use of funds. Multiple quotes are not required for a "sole source" contract.

Nothing in this section shall require or be interpreted to require TGS to choose or select the lowest cost provider of goods or contracted services, and TGS will have discretion in what criteria it gives most weight when selecting vendors and providers in order to maximize student achievement and well-being.

Consistent with this section, any rules or regulations governing federal funds shall supersede the above when otherwise contradictory.

c. Purchasing

Once sufficient diligence has been done by way of quotes, proposals, and/or research and an expenditure has been approved, the Operational Partner or an employee with approval will either request an invoice from a vendor or submit a formal purchase order to request an invoice.

d. Invoice Processing and Requests for Payment

On a weekly basis, the Operational Partner will review invoices for accuracy, as well as review invoices for goods against received goods and packing slips and address any inconsistency with vendors. Each week, the Operational Partner will process all invoices received, including both expense and restricted fund account coding. All weekly invoices will be compiled and summarized in a payment approval report to be reviewed by the appropriate approvers based on the approval thresholds described below.

Notwithstanding the above, TGS shall abide by the back-office provider accounts payable policies and procedures set forth separately regarding documentation requirements, systems, timelines, and submissions. These policies and procedures must, at a minimum, adhere to generally accepted internal control standards that would satisfy a qualified independent auditor.

e. Payment Approvals

Payments under $5,000 must be approved by one of the following authorized positions: Executive Partner, Board Treasurer, or Board Chair, with the Executive Partner being the primary approver.

Payments for $5,000 or more must be approved by the Executive Partner AND Board Treasurer or Board Chair.

Payments to the Executive Partner should be approved by the Board Treasurer, and if in excess of $10,000, by the Board Chair as well.

Under no circumstances should the recipient be the approver.

For regular recurring, not re-occurring, payments, such as rent, when the amount is fixed and the frequency of payment is set, annual approval is allowed.

Payment will be issued only after all required approvals have been documented. A check register will be generated for each invoice batch as record of issuance. If the board prefers to review, the monthly check register will be included in the monthly board packet for board review.

f. Debit Card Usage

Debit card use is not allowed unless explicitly approved by the board, and only if other means of payment do not exist.

Physical debit cards should be destroyed when received to prevent potential misuse or fraud unless a compelling reason exists to keep one on the school premises. Any existing debit cards must be kept in a secure location accessible only by approved staff.

g. Credit Card Usage

Subject to board approval, TGS may establish a credit card account.

The credit card account may include spending rewards, but all rewards must be retained for the exclusive use and benefit of TGS.

The use of a credit card shall be allowed with a maximum authorized credit limit of $20,000 in total and no single cardholder should have a limit above $4,000.

Credit cards shall only be issued to and used by the Executive Partner and Operational Partner. Any additional issuance needs to be approved by the board. Use by any other person is prohibited.

An individual charge should not exceed $4,000, except with approval by the Board Treasurer or Board Chair. Total charges in a month shall not exceed the credit card limit.

Authorized credit card holders are responsible for submitting itemized receipts or other printed documentation from the vendor for all transactions and providing sufficient reporting as to the necessity of the charge. Credit card statements may not be considered as sufficient supporting documentation. If the card holder cannot provide a receipt or alternative documentation, s/he will complete a lost receipt form.

For any purchases that are charged without adequate supporting documentation and justification, the purchaser and/or card holder may be required to reimburse TGS the amount of such purchases.

Every effort should be made to pay the current balance due in full and mitigate financing charges unless a compelling reason exists for a partial payment.

h. Sales Tax Exemption (Tennessee)

As a charter school operating as a local education agency (LEA) in Tennessee, TGS is exempt from Tennessee state sales and use tax on purchases made for school purposes pursuant to Tennessee Code Annotated § 67-6-322.

<u>Certificate of Exemption</u>

TGS shall obtain and maintain a current Certificate of Exemption from the Tennessee Department of Revenue. The Operational Partner shall be responsible for:

- Ensuring the school's exemption certificate remains current and accessible

- Providing copies of the exemption certificate to vendors when making tax-exempt purchases
- Maintaining a file of all exemption certificates provided to vendors
- Renewing or updating the certificate as required by the Tennessee Department of Revenue

Proper Use of Exemption

The sales tax exemption applies only to purchases made directly by TGS for educational purposes. The exemption does not apply to:

- Purchases made by employees using personal funds (even if later reimbursed)
- Purchases of items for personal use
- Purchases made by contractors or vendors on behalf of the school

When making purchases, authorized staff shall:

1. Inform vendors at the time of purchase that the school is tax-exempt
2. Provide the vendor with TGS's Certificate of Exemption
3. Ensure invoices and receipts reflect the tax-exempt status
4. Review all invoices to confirm sales tax was not charged; if charged in error, request a corrected invoice or refund

Credit Card and Online Purchases

For credit card and online purchases, the Operational Partner shall:

- Provide the exemption certificate to frequently used vendors and request tax-exempt status be noted on the account
- For online purchases, upload the exemption certificate during checkout or contact the vendor to arrange tax-exempt processing
- Monitor credit card statements for erroneous tax charges and dispute or request refunds as appropriate

Documentation and Compliance

All tax-exempt purchases shall be documented in accordance with Tennessee Department of Revenue requirements. Misuse of the sales tax exemption may result in penalties and jeopardize the school's exempt status.

i. Electronic Payments

To preserve payment approval processes and internal controls, electronic methods (wire or ACH) shall be limited and subject to enhanced approval requirements.

Permitted Electronic Payments**:**

- Payroll and associated employer/employee liabilities
- Recurring vendor payments over $5,000 (utilities, subscriptions, contracted services) when approved annually by the Board or Executive Partner
- Emergency payments when check processing would create operational disruption or vendor hardship

Required Approvals for Electronic Payments**:** All electronic payments except payroll require documented approval by the Executive Partner AND Board Treasurer prior to initiation.

For payments over $10,000, dual authorization within the banking system (if available) is required, with the Executive Partner initiating and the Board Treasurer or Board Chair approving.

Security Requirements**:**

- All electronic payment requests must be verified through a second communication channel (phone call to known number) when requested via email
- Payment details (amount, recipient, account information) must be confirmed before processing
- Changes to vendor banking information must be verified by phone to a known contact before updating

Any exception to this policy will require documented approval by the Executive Partner and Board Treasurer.

j. Non-Travel Related Employee Reimbursements

Employees, except for the Executive Partner and Operational Partner, will limit non-travel-related reimbursable purchases made with personal funds to no more than $500 at a given time.

Should an employee need to make a purchase with personal funds on behalf of TGS for more than $500, documented approval by the Executive Partner or Operational Partner will be required prior to the purchase.

Employees shall submit a reimbursement request with supporting documentation to the Operational Partner no later than one month from each purchase. A bank or credit card statement may not be considered adequate documentation, and lack of adequate documentation or timely submission may be grounds for non-reimbursement at the discretion of the Executive Partner or Operational Partner.

Under no circumstances shall the purchase of alcohol, THC products, or other age-limited products be reimbursed.

Nothing in this section is to be considered to supersede any personnel policies regarding eligible, reimbursable expenses.

k. Travel-Related Employee Reimbursements

This section is not applicable to regular travel by employees to TGS site or temporary workspace. This section applies to travel for a school business purpose away from school grounds such as a conference, training, required meeting with a vendor, or a recruitment event/activity.

All employees must receive documented approval by the Executive Partner for all school-related travel.

All efforts should be made to make cost-effective, efficient travel arrangements as expeditiously as possible to mitigate cost escalation. This applies to airfare, accommodations, and registration fees.

Travel arrangements should be made and paid for directly by TGS by check or by the Operational Partner or Executive Partner using a school-issued credit card.

In the absence of a superseding policy concerning per diem benefits, whether via the employee handbook or a separately adopted policy, as a matter of practice, meals during school-related travel will be considered reimbursable.

Meals should be modest but otherwise appropriate given the circumstances.

Receipts or documentation must be retained. Lack of documentation may be grounds for non-reimbursement.

Incidental purchases made during school-related travel and otherwise necessary, such as taxi service, are considered reimbursable. Receipts or documentation must be retained. Lack of documentation may be grounds for non-reimbursement.

Employees shall submit a reimbursement request with supporting documentation to the Operational Partner no later than one month from each purchase. A bank or credit card statement may not be considered adequate documentation, and lack of adequate documentation or timely submission may be grounds for non-reimbursement or delayed reimbursement.

Under no circumstances shall the purchase of alcohol be reimbursed.

Nothing in this section shall supersede any personnel policies separately adopted regarding eligible, reimbursable expenses.

I. Employee Mileage Reimbursements

All employees are reimbursed at the current standard mileage rate per mile as determined by the Internal Revenue Service for use of their own vehicle for school-related travel excluding regular travel to and from the workplace. If mileage is expected to exceed 100 miles or more, it must be pre-approved by Executive Partner or Operational Partner.

All employees requesting such mileage reimbursement are required to document the destination of each trip, its purpose, miles driven, and any associated parking fees and tolls, within one month after the travel date, supported by receipts, if applicable.

Per IRS guidance, mileage of an employee driving from his or her residence to TGS or vice versa is not considered reimbursable.

Nothing in this section is to be considered to supersede any personnel policies regarding eligible, reimbursable expenses.

m. Personal Use of School Funds

Use of school funds for personal use is prohibited. Violation of this policy may result in discipline up to and including dismissal or, in case of a board member, removal. The board may seek restitution of any funds lost pursuant to this section.

VI. PAYROLL

a. New Employees

The Executive Partner shall hire all employees at both headcount and compensation levels consistent with the approved annual personnel budget. Any material variance from the approved budget shall be presented to the Board for approval.

New employees shall complete an application for employment and all necessary paperwork for payroll addition.

New employees shall be fingerprinted, and background checked consistently with TN law. Fingerprint and background clearance must be received by TGS before any employee may start any work with students.

Employees shall accrue paid time off (PTO) based on the personnel policies and handbook of TGS.

b. Timekeeping for Hourly Employees & Payroll Changes

The Operational Partner or Executive Partner shall track or implement an electronic system for the accurate and timely preparation of timesheets for hourly employees.

Based on policies and timelines delineated separately by the back-office provider or payroll processor, the Operational Partner or the Executive Partner will submit hourly information prior to each pay day, along with any payroll changes for all staff including salary or rate changes, deduction changes, or other payroll items.

c. Payroll Processing and Accounting

The Operational Partner, or appropriate designee, will submit payroll changes within reasonable time each pay period for the payroll changes to be implemented.

Prior to each payroll run, a payroll preview will be generated and sent to the Executive Partner and the Operational Partner for approval.

Once payroll has been approved and issued, payroll information will be uploaded to the accounting system, and the payroll activity will be reconciled to the banking activity.

Staff will be paid on a semi-monthly basis, specifically the 15th and the last business day of the calendar month. In the event the 15th or last business day falls on a Saturday or Sunday, staff will be paid the immediately preceding Friday.

d. Independent Contractor Vs. Employee

Unless otherwise specified, TGS shall treat individuals as employees unless they meet the IRS test for classification as an independent contractor.

If someone is determined to be an independent contractor, he or she will need to provide a W-9, as well as proof of insurance depending on the nature of his or her work on behalf of TGS.

New contractors who will work with students shall be fingerprinted and background checked consistent with the TN law. Fingerprint and background clearance must be received by TGS before any contractor may start any work with students.

All independent contractors shall be formally engaged under a contract that is approved by the Executive Partner or the Board, based on the contract approval criteria previously enumerated.

Payments to an independent contractor shall be made after receiving an invoice generated by the independent contractor to TGS.

TGS, with the back-office provider's assistance, will generate a 1099-Misc for all independent contractors that received $600 or more in the prior tax year.

e. School Employment Handbook

TGS will create and annually update an employment handbook that details applicable employment policies. The employment handbook should be the official reference for current employment policies and procedures. Employment-related sections of these financial policies do not supersede conflicting policies in the employment handbook.

VII. AUDITS & TAX FILINGS

a. Annual Audit

Each year, no later than April 30th, TGS shall engage an independent and legally authorized accounting firm to perform an audit of the prior year financial statements. The audit shall be performed, and the audit report shall be generated in advance of the statutory audit deadline with adequate review time by the Board (at least two weeks prior to the statutory deadline).

The audit shall include, but not be limited to, (1) an opinion on the financial statements, (2) an audit of the student accounting and restricted revenue compliance, and (3) an audit of the internal controls practices for the purpose of issuing an opinion on the financial statements.

Should TGS expend $1,000,000 or more in federal revenues over the course of a fiscal year, a Single Audit for the fiscal year shall be prepared in accordance with any relevant and effective Office of Management and Budget audit circulars.

Prior to submission of the audit report to [AUTHORIZER NAME] and TDOE, the back-office provider and the Finance Committee will review the audit and respond to any management points, findings, material weaknesses, or significant deficiencies identified during the audit. To the extent appropriate, any official change in policies or procedures necessary to address any issue identified during the audit will be brought before the Governing Board for review.

b. Form 990 Federal Tax Return

The selected audit firm will prepare the Form 990 tax return and send a copy to the school staff responsible for the audit. The school staff will review and send a copy to the Board of Directors for its review and approval before filing. Once approved by the Board, the school will notify the audit firm who will then prepare the final return for filing.

VIII. DONATIONS & PHILANTHROPY

a. Tax Exempt Status & Charitable Solicitation

To the extent that TGS has filed for and received recognition of its 501(c)(3) status as a tax-exempt nonprofit organization, has completed all required annual return filings with IRS, and has completed and maintained all required registration as a charitable organization within the State of Tennessee, TGS may engage in charitable solicitations for tax deductible donations as permitted by local, state, and federal law. Nothing in this section shall prevent TGS from utilizing a fiscal sponsor as an intermediary to solicit and receive donations on its behalf to the extent permitted by local, state, and federal law.

b. Donations

The Operational Partner, separate from the depositing process, will log all cash or cash equivalent donations, recording date of donation, donor's name, donor's contact information, and donation amount.

If TGS receives a donation of $250 or more, the Operational Partner will provide the donor with a written acknowledgement of the donation in compliance with IRS acknowledgement requirements.

c. Donated Stock and Securities

TGS should sell all gifts of stock or securities as soon as practical to convert them into cash and transfer the cash to TGS's checking account. The value of the gift will be recorded based on the cash proceeds less any related sale fees.

d. In-Kind Donations

Donated goods and services provided for free or at less than market value, and suspected to exceed $500 in fair value, should be logged at the fair value or the otherwise avoided cost.

Fair value shall be determined as specified by the donor and may require follow-up by the Operational Partner.

TGS shall record material in-kind contributions of goods and services in the general ledger at their estimated fair value in accordance with applicable governmental accounting standards. Such contributions shall be recognized as both revenue and the corresponding expense or asset, as appropriate, and shall be supported by documentation of valuation and donor acknowledgment.

The Operational Partner shall maintain an accurate log of all donated goods and services, along with their fair value, and provide all relevant documentation during the annual audit process.

IX. FINANCIAL REPORTING & PLANNING

a. Budget Approval

An annual budget shall be approved by the Governing Board prior to the start of each new fiscal year, no later than June 30.

The approved budget will include a summary of assumptions and include both restricted and unrestricted revenues and expenses.

During the year, the Board may adopt an amended budget as expenses and revenue projections change.

The annual budget and material budget modifications will be reported to our school authorizer by the required deadlines.

b. Monthly Financial Statements

The following documents will be prepared prior to each board meeting: (1) budget vs. actuals report (includes the income statement), (2) balance sheet, (3) statement of cash flow, (4) checking account register, (5) credit card register if applicable. A financial synopsis will accompany these documents.

If circumstances arise, the Executive Partner or the Board may request financial statements outside of the monthly financial statement cycle.

The Finance Committee and the Governing Board shall review these materials on a regular basis.

c. Other Financial Reports

Any other financial reports required to be submitted to an outside entity by law or authorizer policy will be prepared in a timely manner and reviewed by the Finance Committee and Governing Board prior to submission.

X. INVESTMENT POLICY

a. Investment Objectives

The primary objectives of TGS's investment activities are, in order of priority: (1) Safety: Preservation of capital and protection of investment principal; (2) Liquidity: Maintenance of sufficient liquidity to meet operational needs; (3) Yield: Attainment of a reasonable rate of return

b. Authorized Investments

TGS may invest funds in the following instruments, consistent with Tennessee law governing public funds:

- Certificates of deposit with financial institutions participating in the Tennessee Public Funds Collateral Pool
- United States Treasury bills, notes, and bonds
- Money market mutual funds invested exclusively in U.S. Treasury and agency securities
- Tennessee local government investment pools approved for public fund investment

c. Prohibited Investments

TGS shall not invest in:

- Individual corporate stocks or bonds
- Derivative securities
- Commodity futures
- Real estate investment trusts (REITs)
- Cryptocurrencies or digital assets
- Any investment not explicitly authorized in this policy

d. Investment Procedures

The Board Treasurer, in consultation with the Executive Partner and back-office provider, shall:

- Review cash flow projections quarterly to determine funds available for investment
- Ensure investments mature in alignment with anticipated cash needs
- Maintain a ladder approach to investments when feasible to provide regular liquidity
- Obtain competitive quotes when investing amounts over $50,000

e. Collateralization

All investments not backed by the full faith and credit of the United States government must be held with institutions participating in the Tennessee Public Funds Collateral Pool or be fully collateralized in accordance with Tennessee law.

f. Reporting

Investment holdings and performance shall be reported to the Board quarterly as part of financial reporting. The report shall include:

- Total investment balance by type
- Maturity dates
- Interest rates and yields
- Compliance with this investment policy

g. Annual Review

This investment policy shall be reviewed annually by the Finance Committee and approved by the Board. Any modifications must be approved by the full Board.

XI. INSURANCE AND RISK MANAGEMENT

a. Required Insurance Coverage

TGS shall always maintain reasonable minimum insurance coverage. Reasonability is based on the unique circumstances of the school during a given coverage period. At a minimum, the school must maintain policies for: general liability, Directors and Officers (D&O), property, workers' compensation, cyber liability, student accident, and abuse and molestation coverage.

Additionally, the Board will annually evaluate the need for additional policies or increased policy limits. Additional policies may include: umbrella liability, employment practices liability, professional liability, fidelity bond or crime insurance covering employee theft, business interruption insurance.

b. Insurance Procurement and Review

The Executive Partner, in consultation with the Board Treasurer, shall:

- Obtain competitive quotes from licensed insurance brokers at least every three years
- Review all policies annually prior to renewal to ensure adequate coverage
- Ensure all policies are renewed without lapse in coverage
- Notify the Board immediately of any claims or potential claims
- Maintain certificates of insurance and provide copies to authorizer, lessors, and other parties as required

The Gate School – Financial Policies and Procedures

c. Certificate Requirements

The Operational Partner shall:

- Maintain current certificates of insurance for all policies
- Provide certificates to the authorizer annually and upon request
- Provide certificates to vendors, landlords, and other parties as required by contract
- Ensure TGS's insurance agent provides updated certificates within 30 days of any policy renewal or change

d. Risk Management

TGS shall implement risk management practices including:

- Annual safety inspections of facilities and equipment
- Regular review and updating of emergency procedures
- Background checks for all employees and volunteers with student contact
- Regular training on safety protocols, harassment prevention, and data security
- Incident reporting and documentation procedures

e. Claims Management

In the event of an insurance claim:

1. The Executive Partner shall be notified immediately of any incident that may result in a claim
2. The Executive Partner or Operational Partner shall notify the insurance carrier within 24 hours of learning of a potential claim
3. The Executive Partner shall notify the Board Chair and Board Treasurer within 24 hours
4. The Finance Committee shall review all claims and settlements quarterly
5. Claims exceeding $25,000 shall be reported to the full Board immediately

f. Annual Insurance Report

The Board Treasurer shall present an annual insurance report to the Board including:

- Summary of all current policies and coverage limits
- Premium costs and year-over-year changes
- Claims history for the past three years
- Recommendations for coverage adjustments

- Comparison to insurance requirements in the charter agreement

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XII. FACILITY AND REAL ESTATE POLICIES

a. Facility Lease Approval

All facility leases, whether for the primary school building, additional instructional space, or administrative offices, must be approved by the Board of Directors prior to execution.

The Executive Partner shall present to the Board:

- Proposed lease terms including rent, escalations, length of term, and renewal options
- Total financial commitment over the life of the lease
- Comparison to market rates for comparable space
- Impact on the school's operating budget and cash flow
- Facility condition assessment
- Zoning and code compliance verification
- Certificate of occupancy status or timeline

b. Lease Negotiation Authority

The Executive Partner may negotiate lease terms but may not execute any lease agreement without Board approval, regardless of cost or term length.

For lease renewals where terms remain substantially similar to the existing lease (rent increases of 3% or less annually), the Board may grant pre-approval for execution by the Executive Partner with notification to the Board within 10 days of execution.

c. Real Property Purchase

Any purchase of real property by TGS requires:

1. Board approval of the purchase price and material terms
2. Independent appraisal by a licensed appraiser
3. Phase I environmental assessment
4. Title insurance commitment review
5. Legal review of purchase agreement by school counsel
6. Authorizer notification as required by charter agreement
7. Verification of zoning compliance and educational use authorization

The Board may not approve a real property purchase that would jeopardize the financial sustainability of the school or require debt financing not otherwise approved by the Board.

d. Facility Maintenance and Capital Improvements

Annual Facility Budget: The Operational Partner shall develop an annual facility maintenance and repair budget to be included in the school's operating budget.

Emergency Repairs: The Executive Partner may approve emergency repairs up to $10,000 without prior Board approval when necessary to maintain safety or prevent property damage. The Board shall be notified of such repairs within 5 business days.

Capital Improvements: Any capital improvement or renovation project exceeding $50,000 must be approved by the Board prior to commencement. The Executive Partner shall present:

- Scope of work and project timeline
- Total project budget including contingencies
- Funding source (operating budget, reserves, grants, or financing)
- Impact on school operations during construction
- Required permits and approvals
- Contractor selection process and proposed contractor

e. Disposition of Real Property

Any sale or disposition of real property owned by TGS requires:

1. Board approval by a two-thirds majority vote
2. Independent appraisal within 6 months of proposed sale
3. Documentation that the sale is in the best interest of the school
4. Authorizer notification as required by charter agreement
5. Plan for use of sale proceeds

Proceeds from the sale of real property shall be used first to retire any outstanding debt secured by the property, with remaining proceeds used for educational purposes consistent with TGS's mission and the Board's fiduciary duties.

f. Facility Use by Outside Parties

TGS may permit use of its facilities by outside parties when such use does not interfere with the school's educational program.

The Executive Partner may approve facility use agreements for:

- Educational or community benefit activities aligned with the school's mission
- Use periods not exceeding 30 days per year per organization
- Activities that do not pose liability or safety concerns

All facility use agreements must:

- Be documented in writing
- Include proof of liability insurance naming TGS as additional insured
- Specify fees (if any) and payment terms
- Hold TGS harmless from claims arising from the use
- Prohibit any political campaign activities or partisan political events

Facility use fees shall be established by the Executive Partner considering the cost of utilities, custodial services, and wear on facilities, and may include a discount for educational or nonprofit community organizations.

XIII. TECHNOLOGY AND CYBERSECURITY FOR FINANCIAL SYSTEMS

a. Financial System Access Controls

Access to TGS's financial systems, including accounting software, payroll systems, and online banking, shall be restricted to authorized personnel only.

The Operational Partner shall maintain a current list of all individuals with access to financial systems, including their specific permissions levels.

Access shall be:

- Granted based on job responsibilities and following the principle of least privilege
- Reviewed quarterly to ensure appropriateness
- Immediately revoked upon separation from employment
- Protected by strong, unique passwords meeting minimum complexity requirements
- Subject to multi-factor authentication (MFA) for all financial system access

b. Online Banking Security

Online banking access shall be limited to the Executive Partner, Operational Partner, Board Treasurer, and Board Chair. The back-office provider may have view-only access in order to download statements.

Required security measures include:

- Multi-factor authentication for all banking access
- Unique usernames and passwords for each authorized user (no shared credentials)
- Immediate notification to the bank and all board members if unauthorized access is suspected
- Regular review of login history for anomalies
- Dual authorization requirements for ACH or wire transfers over $5,000
- Out-of-band verification (phone call) for any changes to authorized users or transfer limits

c. Payment Processing Security

For electronic payment processing (credit cards, online donations, point-of-sale systems):

- All systems must be PCI-DSS compliant
- TGS shall not store credit card numbers, CVV codes, or full payment card data
- Payment processing shall use reputable, established vendors
- Systems shall be configured to require authorization before processing
- Regular reconciliation of payment processor reports to bank deposits

d. Email and Phishing Protections

Financial transactions via email pose significant fraud risk. TGS shall implement the following safeguards:

- All requests to change payment information (vendor bank accounts, direct deposit information) must be verified by phone call to a known number before implementation
- Email requests for payments, wire transfers, or urgent financial actions shall be verified through a second communication channel
- All staff with financial responsibilities shall receive annual cybersecurity and phishing awareness training
- Email from external sources requesting financial transactions shall be clearly marked
- Suspicious emails shall be reported immediately to the Operational Partner and IT support provider

e. Data Backup and Recovery

Financial data shall be backed up daily with backups stored securely off-site or in cloud storage with appropriate encryption.

The Operational Partner shall:

- Verify successful backup completion weekly

- Test data restoration capability quarterly
- Maintain encrypted backups for at least 7 years consistent with record retention policy
- Ensure backup systems are protected with same security measures as primary systems

f. Vendor Management and Third-Party Access

Any vendor requiring access to TGS's financial systems or data must:

- Execute a written agreement that includes data security and confidentiality provisions
- Provide evidence of their own cybersecurity practices and insurance
- Use secure, encrypted connections for data transmission
- Limit access to only the data and systems necessary for their services
- Notify TGS immediately of any data breach or security incident

The Operational Partner shall maintain a list of all third-party vendors with financial system access and review this list quarterly.

g. Incident Response

In the event of a suspected or confirmed cybersecurity incident affecting financial systems:

1. The Operational Partner or person discovering the incident shall immediately notify the Executive Partner
2. The Executive Partner shall notify the Board Chair and Board Treasurer within 2 hours
3. Affected systems shall be isolated to prevent further unauthorized access
4. The school's IT provider and cybersecurity insurance carrier shall be notified immediately
5. Law enforcement shall be contacted if criminal activity is suspected
6. The back-office provider and bank shall be notified if financial accounts are compromised
7. A full incident report shall be prepared for the Board within 7 days

h. Financial System Updates and Patches

All financial software and systems shall be kept current with security patches and updates. The Operational Partner shall coordinate with IT support providers to ensure:

- Operating systems are updated monthly or as critical patches are released
- Financial software is updated within 30 days of vendor release
- End-of-life software is replaced before vendor support ends

- Anti-malware software is active and updated on all devices accessing financial systems

i. Annual Security Assessment

Annually, the Finance Committee shall review:

- Financial system access controls and user lists
- Cybersecurity incident log (if any)
- Vendor security practices
- Staff training completion
- Insurance coverage for cyber risks
- Recommendations for security improvements

XIV. OTHER PRACTICES & FINANCIAL MATTERS

a. Conflicts of Interest

Any board member with a financial interest in a matter presented to the board shall fully disclose such interest prior to board discussion on the issue and shall recuse themselves from the discussion and voting on the matter.

The Board shall develop a separate more comprehensive policy on conflict of interest, hiring of relatives, and compliance with Tennessee Code Annotated and IRS requirements.

Details of the policy on conflicts of interest can be found in TGS Code of Ethics, a copy of which can be found in the appendix to the Employment Handbook.

b. Related Party Transactions

TGS will identify, recognize, and evaluate any related party transactions. Further detail may be found in the Code of Ethics.

c. Whistleblower Policy

TGS policy shall extend to financial matters and improprieties.

If a whistleblower presents a matter to the Executive Partner or the Board, the matter shall be properly reviewed and investigated accordingly.

d. Debt

TGS will only incur debt to the extent necessary to fulfill its mission and will seek to limit short and long-term liabilities to the extent possible.

Any debt, whether loans, notes, or lines of credit must be approved by the Governing Board. Information about covenants, restrictions, and other requirements associated with the debt must be reviewed at time of approval.

The Finance Committee will review ongoing compliance with incurred debt, as well as strategies to reduce debt and associated borrowing expense as expeditiously as possible.

TGS will avoid utilizing vendor financing unless otherwise preferable to other forms of debt.

e. Political Contributions & Advocacy

TGS will not make any direct or indirect contribution of funds, assets, or resources to a political party or individual serving in or seeking public office.

Nothing in this section is to prevent TGS from seeking membership with charter advocacy organizations, local or otherwise, that may be engaged in political campaign activities.

Nothing in this section is to prevent TGS from engaging in lobbying, provided it complies with IRS guidance that a substantial part of TGS activities is NOT devoted to attempting to influence legislation. To the extent TGS does engage in lobbying activities, the Executive Partner or Operational Partner will maintain on file an itemization of both direct and indirect costs for entry and recording in the accounting system.

f. Approvals and Authorizations

Throughout the preceding financial policies and procedures, various requirements for approvals and authorizations by the Executive Partner, Operational Partner, Board Treasurer, and Board Chair are enumerated. Considering current technological and business practices, an approval shall be deemed valid and in compliance with the financial policies and procedures if it comes in the form of email approval, written in the affirmative of the specific matter or attachment or set of attachments, from the approver's school email account, or if unavailable, his or her regularly-used email account. Silent assent over email or verbal approval by phone will not be deemed valid.

Approvals documented through authorized electronic systems or platforms, including but not limited to secure file-sharing systems, accounts payable platforms, payroll systems, or other board-approved workflow tools, shall be deemed valid and in compliance with this policy, provided such approvals are attributable to the appropriate approving authority and are retained in accordance with the School's records retention requirements.

Board approval or authorization shall be deemed valid if provided pursuant to board action at an official meeting of the Governing Board of TGS.

g. Confidentiality

Confidential information includes information gained during employment with or service of TGS that is otherwise not common knowledge including, but not limited to, student records, personnel records,

financial and donation information. All employees and board members must maintain confidentiality to the extent that is allowed by local, state, and federal law.

XV. FEDERAL GRANT COMPLIANCE

a. EDGAR Compliance

In December 2014, the U.S. Department of Education finalized changes to EDGAR, incorporating the Uniform Grants Guidance. Title 2 CFR 200 contains all requirements in entirety. Charter schools were advised to augment their written financial policies and procedures to acknowledge and incorporate these changes. In compliance with Title 2 CFR 200, TGS will:

- Formally identify all direct federal awards in its audited financial statements with the CFDA Title and Number, along with Federal Award I.D. # if applicable, Fiscal Year of Award, and Federal Agency.
- Meet any performance reporting requirements related to a federal award as established by the U.S. Department of Education and Tennessee Department of Education.
- Maintain adequate documentation for federal award expenditures.
- Implement internal controls over safeguarding of assets and ensuring use for authorized purposes.
- Have the Executive Partner certify on annual and final fiscal report submissions that the report, to the best of his or her knowledge, is accurate and the expenditures are consistent with required purposes and objectives, and that fraudulent or fictitious information may subject him or her to criminal, civil, or administrative penalties.
- Compare expenditures against budgeted amounts for each award.
- Implement cash management procedures that minimize draw from federal or state agencies and actual expenditures, as well as interest earned.
- Implement cost allowability procedures in accordance with Subpart E—Cost Principles, specifically that the costs are necessary, reasonable, and allocable.
- Implement procurement procedures for federal awards that:
    - Ensure contract administration by school.
    - Checks for any conflict of interests including organizational conflicts of interest.
    - Ensure vendors are selected via a full and open competition process, specifically:
        - No competitive quote solicitation required for purchases under $3,000 (micro-purchase threshold).

- Quotes for purchases between $3,001 and $250,000 (simplified acquisition threshold).
- No selection of noncompetitive proposals unless noncompetitive criteria are met.
- All procurements over $250,000 (simplified acquisition threshold) are subject to cost or price analysis.
- No debarred or suspended vendor participation as listed in SAM, with any contracts over $25,000 requiring some form of positive verification.
- Implement equipment and supply definitions, thresholds, usage, and disposition requirements for items purchased using federal awards.

To the extent that it is compatible with and does not supersede new EDGAR requirements, TGS will adhere to OMB Circular A-87, which mandates that:

- All expenses paid with federal funds are necessary or needed for performance or administration of the federal grant in question; or
- The expenses are allocable or benefit the program in proportion to the amount of money paid.
- Expenses are reasonable, in that the LEA follows sound business practices, pays a fair market price, and acts with prudence under the circumstances.
- Funds should be targeted where the needs are greatest.
- Federal grant dollars should be used to supplement, not replace (i.e., supplant) spending that would have happened anyway using local money had the federal funds not been available.

For all federal grants, the Executive Partner and Operational Partner will ensure that reimbursement requests cover the appropriate grant period and will verify that all goods and services for which TGS is seeking federal reimbursement have not only been purchased and paid for but have been received by TGS.

b. Federal Cash Management Procedures

To comply with requirements under Title 2 CFR 200 in regard to limiting time between receipt and disbursement of funds, as well as interest earned, TGS will implement a reimbursement-only process for federal grants.

Specifically, TGS will only apply for reimbursement of actual expenditures to date and never for anticipated expenditures or expenditures that have not otherwise been approved.

If any expenditures submitted for reimbursement are determined to be disallowed, TGS will retag the expenditures in question to not charge them to the federal grant in question.

c. Federal Cost Allowability Procedures

Title 2 CFR 200 requires that federal award recipients develop procedures to implement cost allowability oversight of use of funds. Any purchase of goods or services over the simplified acquisition threshold shall follow the procurement guidelines of Title 2 CFR 200, as appropriate. TGS will follow the following procedures:

- The Executive Partner, along with the back-office provider, will develop budgets for federal grants collaboratively.
- Prior to submission, the team will review for compliance with program requirements and remove any items not otherwise necessary for implementing the program goals. This includes but is not limited to reviewing the specific items of cost outlined starting at Title 2 CFR 200.420. This determination will be kept on file.
- Approval of the budget submitted by the applicable program office will also be taken to mean tacit approval of the proposed expenditures as being otherwise allowable.
- Any personnel expenditures submitted for federal grant reimbursement will require either a monthly or semi-annual certification of the individuals' time and effort spent. If the individual or individuals are paid via multiple funding sources, this will also be documented. A job description will be kept on file.
- Given that TGS will only apply for reimbursement of expenditures and those expenditures will only be allowable if reimbursed, there should be no unallowable costs paid for with federal funds. However, if an unallowable cost is somehow paid for using federal funds, TGS will refund any monies including interest to the federal government.

Time and Effort Certification Requirements:

For personnel costs charged to federal grants, TGS shall maintain time and effort documentation as follows:

Single Cost Objective Employees (employees who work solely on a single federal program):

- Semi-annual certification signed by the employee and supervisor confirming the employee worked solely on the federal program for the certification period

Multiple Cost Objective Employees (employees whose time is split between two or more cost objectives, at least one of which is a federal program):

- Monthly Personnel Activity Reports (PARs) documenting actual time spent on each cost objective
- Reports must be signed by the employee and approved by a supervisor with direct knowledge of the work

- Reports must account for 100% of the employee's compensated time

After-the-Fact Documentation:

- Time and effort documentation must reflect actual activity, not budgeted or estimated distributions
- Documentation must be prepared contemporaneously (within the same pay period or monthly for semi-annual certifications)
- Corrections or changes must be initialed and dated with explanation

The Operational Partner or Executive Partner shall be responsible for ensuring timely completion and retention of all time and effort documentation and for providing such documentation to the back-office provider for grant reimbursement requests.

d. Conflicts of Interest in Federal Procurement

Title 2 CFR 200 requires that conflicts of interest and organizational conflicts of interest are identified and mitigated as part of the procurement process when using federal funds. As a matter of practice, TGS already requires any board member with a financial interest in a matter presented to the board to fully disclose such interest prior to board discussion on the issue and recuse themselves from the discussion and voting on the matter. As such, it is already applicable.

Organizational conflicts of interest occur when a vendor or potential vendor to be paid using a federal award creates an unfair competitive advantage for the vendor or the vendor's objectivity. Examples can include engaging a vendor to create procurement rules for federal awards who can then create biased rules for federal procurement to give itself an upper hand, a vendor is contracted with federal funds to evaluate the proposals or past performance of itself or a competitor, or a vendor has unequal access to information as part of its relationship with TGS for future federal procurement. TGS shall identify situations where a vendor may have undue influence over the procurement process using federal funds and take steps to either mitigate or eliminate said influence completely.

e. Disposition of Federally Funded Property

Disposition of Equipment

1. Disposal of federally funded equipment requires prior written approval from the Executive Partner or designee and, when required, the pass-through entity or federal awarding agency.
2. Equipment with Fair Market Value of $5,000 or Less:
    - TGS may retain, sell, or otherwise dispose of the equipment without further obligation to the federal awarding agency.
    - Proceeds, if any, shall be used in accordance with grant and Board policy.
3. Equipment with Fair Market Value Greater Than $5,000:

- TGS may retain or sell the equipment but must compensate the federal awarding agency for its proportionate share of the current fair market value or sale proceeds.
- The federal share shall be calculated based on the percentage of federal participation in the original purchase cost.

4. When directed by the pass-through or federal agency, the TGS shall transfer or return equipment in accordance with written instructions and maintain documentation of the transaction.

Disposition of Supplies

Unused supplies with a total aggregate fair market value exceeding $5,000 at the end of the grant period shall be compensated to the federal awarding agency in proportion to the federal share, unless otherwise authorized.

Prohibited Actions

- Federally funded property may not be donated, scrapped, transferred, or sold without following these procedures.
- No individual may personally benefit from the disposition of federally funded assets.

Documentation and Audit Trail

All disposition actions must be documented, including:

- Description of the asset
- Original funding source and percentage
- Method of disposition
- Fair market value or sale price
- Calculation of federal share
- Evidence of approval and remittance, if applicable

Records shall be retained in accordance with federal record retention requirements and made available for audit or monitoring.

XVI. TENNESSEE CHARTER SCHOOL SPECIFIC COMPLIANCE

a. Authorizer Financial Reporting

In addition to the general financial reporting requirements outlined elsewhere in this policy, TGS shall comply with all financial reporting requirements specified in its charter agreement and required by [INSERT AUTHORIZER NAME].

At minimum, this includes:

- Annual budget submission by the deadline specified in the charter (typically June 30)
- Monthly or quarterly financial reports as specified in the charter agreement
- Material budget amendments within 30 days of Board approval
- Annual audited financial statements within 120 days of fiscal year end (or as specified in charter)
- Immediate notification of any financial circumstances that may jeopardize the school's ability to meet its obligations

b. Tennessee Department of Education Reporting

TGS shall comply with all financial reporting requirements of the Tennessee State Board of Education and Tennessee Department of Education, including:

- Annual financial reports in the format and timeline specified by TDOE
- Data submissions for state funding calculations (ADM, enrollment reports)
- Grant-specific financial reports for state-funded programs
- Any additional reports required by Tennessee law or regulation

c. Federal Reporting

As a recipient of federal funds, TGS shall comply with all federal financial reporting requirements, including:

- Single Audit (if federal expenditures exceed $1,000,000 in a fiscal year)
- Grant-specific financial reports (e.g., CSP, Title I, Title II, IDEA)
- Federal subaward reporting as required under FFATA
- SAM.gov registration and annual renewal

d. Public Financial Transparency

In accordance with Tennessee public records law and charter school transparency requirements, TGS shall:

- Post annual audited financial statements on the school website within 10 days of Board acceptance
- Post annual budget on the school website within 10 days of Board approval
- Post annual Form 990 on the school website (or ensure it is available via GuideStar or similar platform)

The Gate School – Financial Policies and Procedures

- Make financial policies and procedures available upon request
- Respond to public records requests for financial documents within timeframes required by Tennessee law

The Operational Partner shall be responsible for ensuring timely posting and maintaining an archive of financial documents on the school website for at least 7 years.

Attachments 1.2 E
Washington Latin Public Charter School
Memorandum of Understanding (MOUs)
Evidence of Community Engagement

MEMORANDUM OF UNDERSTANDING

Between

Washington Latin Public Charter School

and

The Gate School

Effective Date: 4/15/2026

I. PURPOSE

This Memorandum of Understanding (MOU) is entered into by and between Washington Latin Public Charter School ("Washington Latin"), located in Washington, D.C., and The Gate School ("TGS"), a new charter school in development. This MOU outlines a collaborative partnership focused on meaningful model sharing, structured learning opportunities, and mutual contribution as TGS moves toward authorization and launch.

II. BACKGROUND

Washington Latin Public Charter School is a nationally recognized classical, discussion-based school that has demonstrated strong, measurable academic outcomes in Washington, D.C. Latin's model is distinguished by several hallmark practices, including administrator-teachers who teach daily alongside faculty and a commitment to Socratic, discussion-based learning as the primary instructional approach. The strength of this model is reflected both in student results and sustained family demand. Latin students consistently outperform city averages on state assessments, including significantly higher proficiency rates in core subjects such as ELA. At the same time, Washington Latin remains one of the most sought-after public schools in the city, with thousands of students on its waitlist each year.

The Gate School is a proposed charter school seeking authorization with a mission and instructional model closely aligned with the practices that have made Washington Latin successful. TGS's founders have identified Washington Latin as a key proof point and source of inspiration for the school's design. At its core, The Gate School is built on the belief that every student is capable of academic excellence and that great teaching is the most consistent driver of that outcome. The model is designed to make student thinking visible through structured discussion, frequent writing, and ongoing feedback. Like Washington Latin, TGS prioritizes dialogue as a central instructional approach and is built on a staffing model where instructional leaders teach students daily while also leading the work of the school.

III. SHARED VALUES AND EDUCATIONAL PHILOSOPHY

Both Washington Latin and The Gate School are committed to the following principles:

- Discussion-based learning as the primary instructional model
- Administrators who serve as active classroom teachers on a daily basis
- A strong school culture rooted in community, challenge, and intellectual curiosity
- Continuous improvement through reflective professional practice and model sharing
- The belief that successful school models should be documented, shared, and replicated to expand educational equity

IV. MUTUAL BENEFITS OF PARTNERSHIP

Both parties recognize that this partnership is designed to be mutually beneficial. The anticipated benefits to each party are outlined below:

Benefits to Washington Latin:

- **Model Replication:** Washington Latin's instructional model, developed over years of practice, reaches new communities through TGS. A successful TGS serves as evidence that Washington Latin's approach is replicable and scalable beyond its current context.
- **National Visibility:** Washington Latin will be named as the foundational proof point in TGS's charter authorization materials, grant applications, and public communications, raising Washington Latin's profile with funders, authorizers, and policymakers nationally.
- **Reciprocal Learning**: As a new school, TGS will pilot adaptations of shared practices and document what works. TGS agrees to share these findings with Washington Latin, offering an outside perspective that may generate useful reflection and innovation for Washington Latin's own practice.
- **Documentation of Practice:** Through the model-sharing process, Washington Latin may benefit from the articulation and documentation of its own practices in new ways, which can support staff development, replication fidelity, and institutional memory.

Benefits to The Gate School:

- **Model Proof Point:** Provides credibility for The Gate School's core design principles by demonstrating that rigorous, discussion-based learning drives academic excellence and that leaders who teach remain more effective instructional leaders. This formal partnership can be referenced in charter authorization applications and funding proposals, showing that TGS is grounded in the practices of an existing, high-performing school.
- **Resources and Tools:** Access to Washington Latin's resources and tools, including seminar protocols, instructional frameworks, and professional development materials to support high quality model implementation for TGS.
- **Reciprocal Learning:** Ongoing opportunities to observe Washington Latin's practices in action, including classroom instruction, advisory structures, and school operations and a committed partner who will visit The Gate School to observe, reflect, and offer feedback on TGS's implementation of shared practices.
- **Advisory Support:** Direct advisory support from Washington Latin leadership during the critical design and pre-launch phases, and on an ongoing basis as TGS grows.
- **Movement Ally:** An ally in promulgating the idea that all administrators should teach — and in modeling what that looks like for the broader field.

V. SCOPE OF PARTNERSHIP

The parties agree to explore and develop a collaborative partnership that may include the following activities, subject to the availability of staff time and resources:

A. Model Sharing and Site Visits

- Washington Latin will aim to host up to two (2) site visits annually for TGS leadership and key team members, focused on classroom observation, administrator-teacher structures, and discussion-based instruction, subject to scheduling and operational capacity.
- TGS will have the opportunity to observe core elements of Washington Latin's model in practice, including the administrator-teacher model, advisory structures, and discussion-based instruction.
- Washington Latin may share relevant programmatic documents, sample schedules, and instructional or operational resources, as appropriate and at Washington Latin's discretion.

B. Professional Development and Mentorship

- Washington Latin leadership will engage in periodic advisory conversations with TGS leadership to support school design and launch preparation.
- The parties may explore opportunities for shared professional development aligned to discussion-based instruction and teacher-leader development, including potential participation in training experiences where appropriate.

C. Authorization and Funding Support

- Washington Latin agrees to serve as a proof-of-concept reference for TGS in its charter authorization application, demonstrating that the TGS model is grounded in evidence from an existing, successful school.
- This partnership may be referenced by TGS in grant applications and communications with funders to demonstrate alignment with proven educational practices.

D. Reciprocal Learning and Knowledge Sharing

- TGS will document its adaptations of the shared model — including what works, what challenges arise, and what innovations emerge — and share these findings with Washington Latin on a mutually agreed schedule, at minimum two times a year..
- Both parties will engage in at least two annual reflection conversations to review learnings, share observations, and identify opportunities for continued collaboration.
- Where appropriate, both schools may collaborate on the documentation of shared instructional practices in ways that strengthen both institutions' capacity to articulate and sustain their models.

VI. RESPONSIBILITIES OF EACH PARTY

Washington Latin Public Charter School agrees to:

- Designate a point of contact to coordinate partnership activities.
- Host at least one site visit per year for TGS founders and/or staff to observe Washington Latin's model in practice, within reasonable operational capacity.
- Engage in good-faith advisory conversations with TGS leadership during the school design and launch phases.
- Share relevant programmatic resources, frameworks, or documentation with TGS, at Washington Latin's discretion, to support faithful implementation of shared practices.
- Participate in at least one visit to The Gate School per year to observe TGS's implementation of shared practices and provide direct feedback.
- Allow TGS to reference this partnership in authorization and fundraising materials.

The Gate School agrees to:

- Designate a point of contact to coordinate partnership activities.
- Honor Washington Latin's time and capacity constraints in scheduling all partnership activities.
- Represent Washington Latin's model and practices accurately and in good faith in all public and private communications, and seek Washington Latin's approval before making any statements that directly quote Washington Latin leadership.
- Share evidence of impact with Washington Latin at least annually, including student outcome data, staff and family feedback, and other indicators of school quality.
- Document and share learnings from TGS's implementation of shared practices with Washington Latin, including findings that may be useful for Washington Latin's own program reflection and development.
- Host Washington Latin leadership and/or staff for at least one visit per year, providing an opportunity to observe TGS's implementation of shared practices and offer feedback.
- Credit Washington Latin publicly and accurately as a foundational model and a partner school in all relevant materials.

VII. TERM AND AMENDMENTS

This MOU shall be effective as of the date signed below and shall remain in effect for a period of two (2) years, unless extended or terminated by mutual written agreement. Either party may terminate this MOU with thirty (30) days' written notice. This MOU may be amended at any time by written agreement of both parties.

VIII. NON-BINDING NATURE

This MOU is not a legally binding contract and does not create any legal obligations or financial commitments between the parties. It represents a shared expression of intent and goodwill. Nothing in this MOU shall be construed to obligate either party to expend funds or provide resources beyond what each party, at its sole discretion, determines to be reasonable and appropriate.

IX. SIGNATURES

By signing below, the authorized representatives of each organization confirm their agreement to the terms of this Memorandum of Understanding.

For Washington Latin Public Charter School:

Signature: DocuSigned by: Diana Smith BE8E50FD3666429...

Name/Title: Diana Smith, Chief Advisor

Date: 4/15/2026

For The Gate School:

Signature: Signed by: Burrus Cox C12120AC16FD4D6...

Name/Title: Burrus Cox, Founder

Date: 4/15/2026

For Washington Latin Public Charter School:

Signature: DocuSigned by: 7B487A1043F0487...

Name/Title: Peter Anderson, Head of Schools & CEO

Date: 4/17/2026

Attachment 1.3: Local Philanthropic Support

Evidence of Community Engagement

Contents of Attachments 1.3: Local Philanthropic Support

- Attachment 1.3 A: Summary of Contributions & Events
- Attachment 1.3 B: Contributions to Date

Attachments 1.3 A

Summary of Contributions & Events

Local Philanthropic Support

Evidence of Community Engagement

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Private Fundraising and Local Support

As part of The Gate School's pre-opening planning, the founding team has begun building a base of private philanthropic support to help fund start-up costs, facility readiness, instructional materials, family engagement, and early operational needs prior to public funding becoming available.

The Gate School's early fundraising reflects meaningful **local Nashville investment** in the school's mission and proposed model. To date, all private contributions have come from donors with direct ties to the Nashville community, demonstrating that local families, civic leaders, educators, and community members see the need for a new high-quality middle school option.

Contributions have ranged from grassroots gifts under $250 to major gifts of $25,000 or more, demonstrating both broad-based support and the ability to secure larger philanthropic commitments. This local fundraising traction is especially important because The Gate School is still in the authorization phase and has not yet begun receiving public per-pupil revenue.

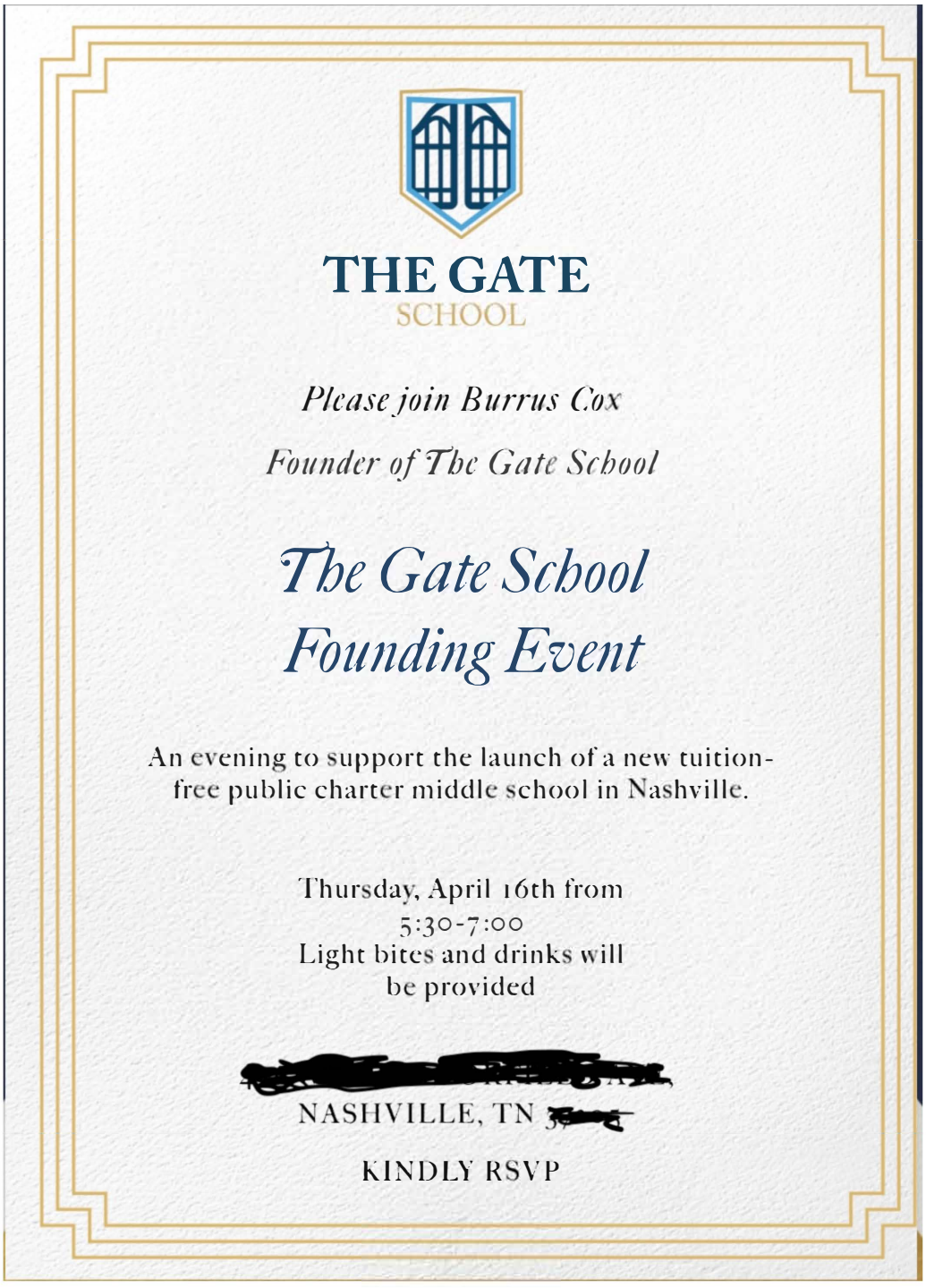
Private contributions during this period help demonstrate that the school has the relationships, credibility, and community backing needed to support a strong launch in Nashville.

As of **May 18, 2026**, The Gate School has received **$154,880** in private contributions from **20 donors.**

Fundraising Progress to Date

Metric	Amount
Total private contributions received	**$154,880**
Number of donors	**20**
Median gift size	**$2,264**
Gifts of $5,000 or more	**8**

Please see attachments 1.3 for documentation of local gifts.



THE GATE
SCHOOL

Please join Burrus Cox

Founder of The Gate School

The Gate School Founding Event

An evening to support the launch of a new tuition-free public charter middle school in Nashville.

Thursday, April 16th from
5:30-7:00
Light bites and drinks will
be provided

[redacted]
NASHVILLE, TN [redacted]

KINDLY RSVP



THE GATE
SCHOOL

FOUNDING PLEDGE CARD

I / We would like to make a founding gift at the following level:

- ☐ $100,000+ Founding Campus Partner
- ☐ $50,000 Harkness Table Partner
- ☐ $25,000 Master Teacher Partner
- ☐ $5,000 AI Innovation Partner
- ☐ $1,000 Founding Community Partner
- ☐ Custom Amount: $_____

DONOR INFORMATION

Full Name _____

Organization / Company (if applicable) _____

Email Address _____ Phone Number _____

Mailing Address _____

City _____ State _____ ZIP _____

PAYMENT METHOD

☐ Check (payable to The Gate School) ☐ Online (scan QR code or at thegateschool.org)

☐ Appreciated Stock

The Gate School is a registered 501(c)(3) nonprofit. All donations are tax-deductible as allowed by law.

Questions? Contact Burrus Cox · burrus@thegateschool.org · www.thegateschool.org

OUR MODEL

1. GREAT TEACHING
Teaching Firm

- We operate as a Teaching Firm, where every adult teaches and leaders stay in the classroom. Teachers receive consistent coaching and collaborate regularly.
- We invest in talent by offering 30% higher compensation, allowing us to attract and retain exceptional educators.

2. VISIBLE THINKING
The Harkness Method

- Students engage in discussion-based learning using the Harkness method. They explain, defend, and revise their thinking daily.
- Learning is active, not passive. Students are expected to think out loud and build on each other's ideas.

3. PURPOSEFUL AI USE
Feedback, Personalization, and AI Literacy

- AI accelerates feedback and personalizes learning, giving students timely support and opportunities to revise.
- Students also build AI literacy, learning how to use these tools responsibly while teachers focus on coaching and deeper instruction.

WAYS TO GIVE:

GIVE ONLINE

MAKE A SECURE DONATION BY SCANNING THE QR CODE OR

OR BY VISITING OUR WEBSITE WWW.THEGATESCHOOL.ORG

DONATE APPRECIATED STOCK

TO MAKE A STOCK GIFT, PLEASE CONTACT BURRUS AT BURRUS@THEGATESCHOOL.ORG

PARTNERSHIPS & MAJOR GIFTS

TO DISCUSS LARGER GIFTS OR PARTNERSHIP OPPORTUNITIES, PLEASE REACH OUT DIRECTLY AT BURRUS@THEGATESCHOOL.ORG

THE GATE SCHOOL IS A REGISTERED 501(C)(3) NONPROFIT ORGANIZATION. ALL DONATIONS ARE TAX-DEDUCTIBLE AS ALLOWED BY LAW.



THE GATE
SCHOOL

www.thegateschool.org
info@thegateschool.org

At The Gate School we make the choice to go through the Narrow Gate

At The Gate School, the Narrow Gate represents the choice to pursue what is challenging, meaningful, and worthwhile rather than what is easiest.

Learning, growth, and excellence rarely come from the path of least resistance. They come from asking harder questions, revising our thinking, and persisting through difficulty. That is the path we choose.

At The Gate School, students are challenged to do difficult things and supported as they learn to do them well. Teachers coach, push, and guide students toward deeper thinking, stronger communication, and greater independence.

In choosing the harder path, students discover something important: the deepest confidence and satisfaction come not from avoiding difficulty, but from overcoming it.

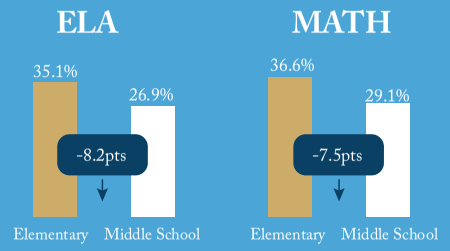
This is the culture of The Gate School. Students, teachers, and families commit to walking this path together.

THE PROBLEM

Middle school is a breaking point for students. As academic expectations increase, outcomes decline, and only 1 in 4 students have access to a high-quality middle school.

THE MIDDLE SCHOOL DROP

MNPS TCAP Proficiency



Middle school is one of the most underdesigned phases of schooling.

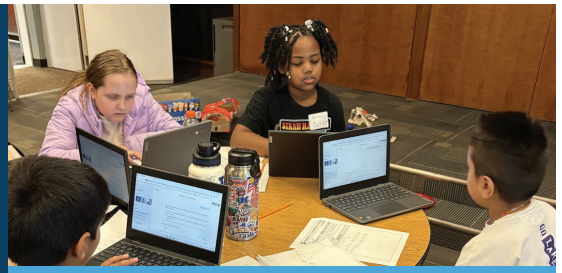
Students are expected to think more deeply, but are given less structure, less feedback, and less consistency in teaching.

HELP LAUNCH THE GATE SCHOOL

Private funding is critical to launch. Public funding begins once students arrive.

Your gift will support:

1. Securing and preparing our founding facility
2. Building curriculum and AI-supported learning systems
3. Outfitting classrooms with furniture, materials, and technology
4. Recruiting students and preparing for launch



WHAT YOUR GIFT CAN DO:

FOUNDING PARTNER
$50,000

Provides a cornerstone investment to help secure and prepare The Gate School's founding facility and support the launch of our first classrooms.

FOUNDING INVESTOR
$25,000

Provides a foundational investment in launching The Gate School, preparing classrooms, and supporting the development of our founding teaching team.

LAUNCH SPONSOR
$10,000

Furnishes a classroom with desks, chairs, whiteboards, and learning materials for 25 students.

CLASSROOM SPONSOR
$5,000

Equips classrooms with technology, books, and instructional materials that support daily learning.

CLASSROOM SPONSOR
$5,000

Equips classrooms with technology, books, and instructional materials that support daily learning.

Attachments 1.3 B

Contributions to Date

Local Philanthropic Support

Evidence of Community Engagement

THE NASHVILLE INCUBATOR

Burrus Cox <burrus@nashvilleincubator.org>

Board Directed Gift - The Gate School

Kate Sorestad <kate.sorestad@fristfoundation.org> Mon, Dec 15, 2025 at 3:09 PM
To: "burrus@nashvilleincubator.org" <burrus@nashvilleincubator.org>
Cc: Annie Axe <annie.axe@fristfoundation.org>

Good afternoon,

I hope you are doing well! I'm writing to share that, as part of our Board Directed Gifts Program, [redacted] has directed a $10,000 grant to the Gate School. Per the program policy, this gift cannot be used to fulfill a personal pledge or result in anything of value being received in return.

For context, the Board Directed Gifts Program is made available to members of The Frist Foundation's Board as budget allows. It is not assumed to be recurring from year to year, and the gifts may or may not fall within the Foundation's primary focus areas.

We are able to provide this payment via electronic payment (Bill.com) or by paper check.

- If you prefer electronic payment, The Frist Foundation utilizes BILL (Bill.com) to remit grant payments. If you do not have a Bill.com payment ID or have not interacted with our Foundation on Bill.com recently, please let us know who should receive your setup invitation and we will start the process. If you do have a Payment Network ID already through Bill.com, please let us know the number.
- If you prefer a paper check, please provide the best contact and address for sending the payment.

For gift follow up, acknowledgements may be sent to The Frist Foundation's mailing address or this email, directed to [redacted]. Finally, we appreciate the opportunity to celebrate your work, however we ask that any public communications about the gift be shared with The Foundation for review in advance.

One question for our processing -- Given the status of your school, can you confirm which 501c3 entity should receive the gift and their corresponding EIN?

Please reply to this email to confirm receipt and payment preference, as well as ask any questions you may have.

Congratulations, and thank you for all that you do for our community!

Kate Sorestad
Program Director
The Frist Foundation

O: 615.292.3868, ext. 5
www.fristfoundation.org

Kate

Gmail

Burrus Cox <burrus@thegateschool.org>

Board Directed Gift: Gate School
1 message

The Frist Foundation <grants@fristfoundation.org> Thu, May 14, 2026 at 10:21 AM
Reply-To: kate.sorestad@fristfoundation.org, annie.axe@fristfoundation.org
To: burrus@thegateschool.org

This email is to inform you that as part of our Board Directed Gifts Program, [redacted] has directed a $50,000.00 gift to the Gate School.

Per the program policy, this gift cannot be used to fulfill a personal pledge or result in anything of value being received in return. For context, the Board Directed Gifts Program is made available to members of The Frist Foundation's Board as budget allows. It is not assumed to be recurring from year to year, and the gifts may or may not fall within the Foundation's primary focus areas.

To process this gift, our Foundation utilizes a grants management system, Temelio, and Bill.com. Please click on the link below to set up or update your Temelio account.

Once the account is activated, you will be asked to select your preferred payment approach, either electronic payment (Bill.com) or by paper check.

- If you already have a Bill.com payment network identification, the system will collect your payment network identification (PNI) and begin processing the payment.

- If you do not have a Bill.com payment network identification, but want an electronic payment, you can designate the preferred contact who should receive your setup invitation.

FIDELITY Charitable℠

P.O. Box 770001
Cincinnati, OH 45277-0053

[redacted]
GATE SCHOOL
816 GWYNN DR
NASHVILLE, TN 37216-1717

April 07, 2026

Greetings:

We are delighted to provide you with the attached check for **$5,000.00**. This Fidelity Charitable Donor-Advised Fund℠ grant was made at the recommendation of the [redacted] a donor-advised fund. [1]

This grant is made by Fidelity Charitable. Fidelity Charitable's donor recommends the grant be used for the following purpose (which does not constitute a restriction): **Where it's needed most.** This grant is to be used exclusively for charitable purposes, and is not made for the purpose of influencing legislation. This grant is also subject to the "Grant Terms" on the next page. If you are unable or unwilling to meet these grant conditions, you must return these funds to Fidelity Charitable.

Should you choose to send a thank-you letter, the donor has requested it be sent to the following address. You should not, however, issue a tax acknowledgement to either the recommending donor(s) or to Fidelity Charitable.

[redacted]

[1] Fidelity Charitable is an independent public charity that sponsors a donor-advised fund program. In a donor-advised fund, Donors make irrevocable charitable contributions to Fidelity Charitable, and have the privilege of recommending grants to qualified public charities.

[redacted]

Page 1 of 2

PLEASE FOLD AND DETACH AT PERFORATION BEFORE PRESENTING CHECK FOR PAYMENT



FIDELITY Charitable™

P.O. Box 770001
Cincinnati, OH 45277-0053

[redacted]
GATE SCHOOL
816 GWYNN DR
NASHVILLE, TN 37216-1717

April 23, 2026

Greetings:

We are delighted to provide you with the attached check for $20,000.00. This Fidelity Charitable Donor-Advised Fund SM grant was made at the recommendation of t[redacted]

This grant is made by Fidelity Charitable. Fidelity Charitable's donor recommends the grant be used for the following purpose (which does not constitute a restriction): **Payment of a Non-Legally Binding Commitment or Pledge.** This grant is to be used exclusively for charitable purposes, and is not made for the purpose of influencing legislation. This grant is also subject to the "Grant Terms" on the next page. If you are unable or unwilling to meet these grant conditions, you must return these funds to Fidelity Charitable.

Should you choose to send a thank-you letter, the donor has requested it be sent to the following address. You should not, however, issue a tax acknowledgement to either the recommending donor(s) or to Fidelity Charitable.

[redacted]

[1] Fidelity Charitable is an independent public charity that sponsors a donor-advised fund program. In a donor-advised fund, Donors make irrevocable charitable contributions to Fidelity Charitable, and have the privilege of recommending grants to qualified public charities.

[redacted]

Page 1 of 2

[redacted] PLEASE FOLD AND DETACH AT PERFORATION BEFORE PRESENTING CHECK FOR PAYMENT

COMMUNITY FOUNDATION OF MIDDLE TENNESSEE

Gate School
816 Gwynn Dr
Nashville, TN 37216

DATE: April 28, 2026

Ladies and Gentlemen:

In accordance with the grant-making purposes of the Community Foundation of Middle Tennessee, it is a pleasure to enclose this grant. Although no one should receive any form of tax receipt and the use of these funds to purchase any tickets or meals or items of value are prohibited, notes of appreciation should be sent to the following:

[redacted]

AMOUNT	FUND	PURPOSE
$5,000.00	[redacted]	General support.

DONOR RECOGNITION: When you recognize this gift in your materials, please list the donor as follows: [redacted] The Community Foundation of Middle Tennessee.

In accordance with IRS regulations, this is being sent upon advice that you are a qualified 501(c)(3) charitable organization in good standing and these funds will not be applied toward a pledge or obligation of any person nor will it entitle any benefits to anyone.

On behalf of the Board of Directors of The Community Foundation, let me express our continued appreciation of your work.

Tiara Miles
Grants Associate

Community Foundation of Middle Tennessee
3421 Belmont Blvd., Nashville, TN 37215
615-321-4939 · 1-888-540-5200 toll-free · mail@cfmt.org
CFMT.org

Council on Foundations

CFNS ACCREDITED FOUNDATION

FIDELITY Charitable℠

P.O. Box 770001
Cincinnati, OH 45277-0053

[redacted]
GATE SCHOOL
816 GWYNN DR
NASHVILLE, TN 37216-1717

April 20, 2026

Greetings:

We are delighted to provide you with the attached check for **$1,000.00**. This Fidelity Charitable Donor-Advised Fund SM grant was made at the recommendation of the [redacted] a donor-advised fund. [1]

This grant is made by Fidelity Charitable. Fidelity Charitable's donor recommends the grant be used for the following purpose (which does not constitute a restriction): [redacted] This grant is to be used exclusively for charitable purposes, and is not made for the purpose of influencing legislation. This grant is also subject to the "Grant Terms" on the next page. If you are unable or unwilling to meet these grant conditions, you must return these funds to Fidelity Charitable.

Should you choose to send a thank-you letter, the donor has requested it be sent to the following address. You should not, however, issue a tax acknowledgement to either the recommending donor(s) or to Fidelity Charitable.

[redacted]

[1] Fidelity Charitable is an independent public charity that sponsors a donor-advised fund program. In a donor-advised fund, Donors make irrevocable charitable contributions to Fidelity Charitable, and have the privilege of recommending grants to qualified public charities.

[redacted] P [redacted] Page 1 of 2

PLEASE FOLD AND DETACH AT PERFORATION BEFORE PRESENTING CHECK FOR PAYMENT

BERNSTEIN | Philanthropic Impact Fund

[redacted]
165 TOWNSHIP LINE ROAD
SUITE 1200
JENKINTOWN, PA 19046-3594

RETURN SERVICE REQUESTED

[redacted]

Check No. [redacted]
Check Date 04/22/2026
Check Amount $2,500.00

US-000075 0001 0001 000075
GATE SCHOOL
816 GWYNN DR
NASHVILLE TN 37216-1717
UNITED STATES OF AMERICA

FOR INQUIRIES, PLEASE CONTACT
NPT AT [redacted]R
[redacted]

National Philanthropic Trust(NPT)(EIN:23-7825575)is pleased to present you with the following charitable grant from a donor-advised fund in the [redacted]

Recommended from/by: [redacted]

Additional Recognition: [redacted]
Purpose: where needed most / Unrestricted / General support

NPT provides donors with a charitable gift receipt when they contribute to their donor-advised fund account. Your organization should not provide a tax receipt for this grant, but you may wish to send the donor a thank you letter for recommending this grant.

This grant may only be used for your organization`s tax-exempt purposes. This grant may not be used to provide anyone with a more than incidental private benefit, and it may not be used to carry on propaganda, to attempt to influence legislation or the outcome of any public election, in support of any political campaign or candidate for public office, or for any other form of lobbying.

Sincerely, Grants Team at National Philanthropic Trust

⬇ PLEASE FOLD ON PERFORATION AND DETACH HERE ⬇

Page 1 of 1

DAFgiving360

[redacted]

[redacted]
GATE SCHOOL
GIFT PROCESSING
816 GWYNN DR
NASHVILLE, TN 37216-1717

pril 23, 2026

RANT ENCLOSED DAFgiving360™ is pleased to present Gate School with the enclosed grant in the amount of $2,500.00. his grant was recommended by [redacted]

rant Amount	$2,500.00
cknowledgment	[redacted]
ddress	
Grant Designation	This grant is for where it's needed most.

If you have any questions regarding this grant, go to **dafgiving360.org/charities**, use the Contact Us form at **dafgiving360.org/contact-us**, or call us at **800-746-6216**. We wish you success with your charitable mission.

NOTE TO THE CHARITY:
By accepting this grant, your organization certifies to DAFgiving360 that:

- This grant will be used exclusively for charitable purposes that comply with all applicable state and federal laws.
- No donor, donor advisor or individual related to the donor(s) and/or donor advisor(s) will receive any goods, services or more than incidental benefit, including but not limited to, benefit tickets, school tuition, membership fees or goods purchased at an auction.
- This grant will not be used to fulfill a pre-existing legally binding pledge.
- If your organization is a government entity, this grant will be used solely for public purposes as that term is used in Section 170(c)(1) of the Internal Revenue Code.

our organization should not provide the donor(s) a tax receipt for this grant, as DAFgiving360 has already provided the donor(s) with a tax receipt at the time of contribution. Please do not send thank you notes or marketing materials to DAFgiving360.

DAFgiving360™ is the name used for the combined programs and services of Donor Advised Charitable Giving, Inc., an independent nonprofit organization which has entered into service agreements with certain subsidiaries of The Charles Schwab Corporation. DAFGiving360 is a tax-exempt public charity as described in Sections 501(c)(3), 509(a)(1), and 170(b)(1)(A)(vi) of the Internal Revenue Code.

Grants and account names are recommendations of the donor(s) and do not reflect the views of DAFgiving360, Charles Schwab & Co. Inc. or any of its affiliates.

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Page 1 of 1

Renaissance Charitable

05/07/2026

Gate School
ATTN Burrus Cox
816 GWYNN DR
NASHVILLE, TN 37216

I am pleased to present your organization with the attached check from a fund within the Renaissance Charitable Foundation. Please note the following details about the grant:

Amount:	$1,500.00
Purpose:	Unrestricted - Please use as needed
Fund:	[redacted]
Recognition:	[redacted]

The donor received written acknowledgement of this tax-deductible gift from the Renaissance Charitable Foundation. You may express your appreciation to the individual(s) who recommend this grant using the recognition information listed above but do not issue a tax-deductible receipt.

Please note this grant may only be used for your organization?s tax-exempt purposes. It may not be used for any political campaign, to provide anyone a private benefit, or to satisfy a pre-existing pledge.

If you have any questions, please contact the Renaissance Charitable Foundation at 855-630-3439.

Sincerely,

Donations (redacted)

Name	Donor Email	Campaign	Tax Deductible Amount	Amount in USD	Donated At	Donation Type	Donor Id	Status
[redacted]	[redacted]	The Gate School	$53.04	$53.04	03/03/2026 09:35:02	[redacted]	16080590	paid
		The Gate School	$250.00	$250.00	03/12/2026 05:49:18		16154046	paid
		The Gate School	$211.18	$211.18	04/16/2026 19:43:32		16432397	paid
		The Gate School	$500.00	$500.00	04/16/2026 19:44:58		16432406	paid
		The Gate School	$100.00	$100.00	04/16/2026 20:13:35		16432541	paid
		The Gate School	$2,030.00	$2,030.00	04/17/2026 01:03:07		16469901	paid
		The Gate School	$2,500.00	$2,500.00	05/08/2026 13:16:13		16568949	paid
		The Gate School	$800.00	$800.00	05/16/2026 08:48:26		16612070	paid

Page 1

Attachment 1.4: Stakeholder Focus Groups
Evidence of Community Engagement

Contents of Attachments 1.4: Stakeholder Focus Groups

- Attachment 1.4 A: Student Focus Group Summary
- Attachment 1.4 B: Teacher Focus Group Summary

Attachments 1.4 A

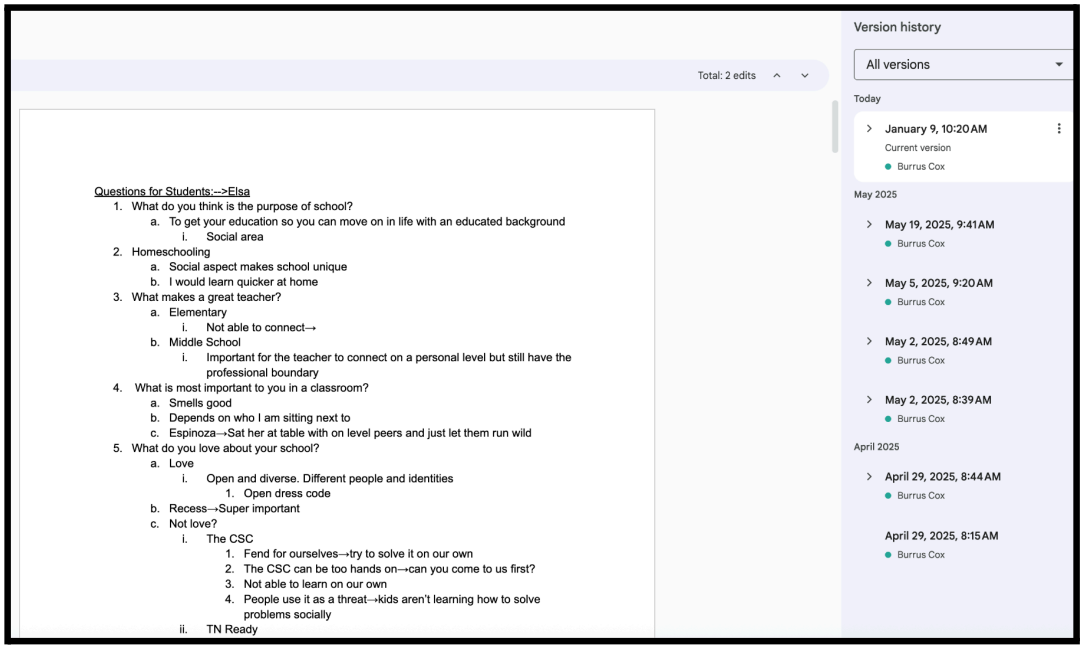
Student Focus Group Summary

Stakeholder Focus Groups

Evidence of Community Engagement

Student Interviews
Spring 2025

Prior to leaving my school in 2025, I maintained notes documenting observations, planning, and reflections relevant to my work. These notes were recorded in a Google Document and preserved with system-generated timestamps. To provide verification, I have included screenshots of the document's version history demonstrating authorship and creation dates in 2025. The original document is also included below.



Questions for Students:-->[redacted]

1. What do you think is the purpose of school?
    a. To get your education so you can move on in life with an educated background
        Social area
2. Homeschooling
    a. Social aspect makes school unique
    b. I would learn quicker at home
3. What makes a great teacher?
    a. Elementary
        i. Not able to connect→
    b. Middle School
        i. Important for the teacher to connect on a personal level but still have the professional boundary
4. What is most important to you in a classroom?
    a. Smells good
    b. Depends on who I am sitting next to
    c. Structure
5. What do you love about your school?
    a. Love
        i. Open and diverse. Different people and identities
            1. Open dress code
    b. Recess→Super important
    c. Not love?
        i. The CSC
            1. Fend for ourselves→try to solve it on our own
            2. The CSC can be too hands on→can you come to us first?
            3. Not able to learn on our own
            4. People use it as a threat→kids aren't learning how to solve problems socially
        ii. TN Ready
6. What does your school not have that you would like?
    a. Real Library→somewhere you could go read
    b. Quiet space to go
    c. Ability to pick your own electives
        i. Would have loved to do art year round.
7. What is the most important factor contributing to you enjoying school?
    a. Friends→Drama ruins the school experience
8. Do you feel like school is too hard, too easy, or just right?
    a. Just right usually→Sometimes goes a little slow
9. What do you think the purpose of HW is?
    a. If you do something right before you go to sleep you will remember it better

   b. Social Studies and Math homework is great
      i. Memorization and practice it is good
10. What is an enrichment/elective that interests you?
   a. Language
11. Closing thoughts/advice
   a. Who you hire as teachers is very important
   b. Really good teacher but not a good classroom presence→If you can tell they are a good person I think it will still work out

Questions for Students: [redacted]

1. What do you think is the purpose of school?
   a. Middle School
      i. Time to figure out who you are
      ii. Bridge between being a kid/teenager
      iii. Know you are who you want to be and who you want around you?
2. What makes a great teacher?
   a. Someone who understands every student is different
   b. Not every student is going to learn the same way
   c. Bringing energy and effort
   d. Reminding students that its okay to not understand something but to not what to
3. What advice would you give to a struggling teacher?
   a. Take time for yourself/figure out how you are feeling
4. What is most important to you in a classroom?
   a. Being able to say how you feel and what you believe
   b. Feel like you can be yourself
   c. Getting to know the teacher
      i. What is their vision?
5. What do you love about your school?
      i. The values and commitments
      ii. How they recognize students
         1. Has an identity
   b. Not love?
      i. Discipline system
         1. The way consequences are portrayed
         2. Your not living up to the standard→Shame
         3. RSA changes your identity
         4.
6. What does your school not have that you would like?
   a. More clubs
   b. Student government
      i. Too many people are on it
   c. Love when I get to speak about something I really believe in
      i.

7. What is the most important factor contributing to you enjoying school?
    a. With friends
    b. Stuff to look forward too
    c. The joy comes from the people
8. Advice for me? How do I create a great school
    a. Experiment
        i. Don't know the people or students
        ii. Getting their opinions about how it's going
        iii. Don't be so hard on yourself→It has to be good or perfect
        iv. Be patient
        v. There is a time for everything
        vi. Might not succeed
        vii.
9. Do you feel like school is too hard, too easy, or just right?
10.
11. What do you think the purpose of HW is?
12. What is an enrichment/elective that interests you?

Questions for Students: [redacted]

1. Do you enjoy School?
    a. Positives
        i. End of the year stuff is fun
    b. Negatives
        i. Some moments where students are being picked on
            1. Teachers don't notice
        ii. CSC is not someone you can always talk to
        iii. We give out punishments higher than what the teachers can
        iv.
2. What do you think is the purpose of school?
    a. Set this precedent of hard work
    b. Prepare your minds for college and big jobs
3. What makes a great teacher?
    a. Able to communicate with
    b. Not just as a teacher but as a friend
4. What is most important to you in a classroom?
5. What do you love about your school?
    a. Not love?
6. What does your school not have that you would like?
    a. More enrichment classes
        i. Financial literacy
7. What is the most important factor contributing to you enjoying school?
    a. Material given in class
    b. How the teacher expands on it

   c. Add their own feeling too it
8. Do you feel like school is too hard, too easy, or just right?
9. What do you think the purpose of HW is?
10. What is an enrichment/elective that interests you?
11. CSC
    a. Has its great qualities
    b. Feels live the government of the school
    c. Safe space where you can talk about your feelings

[redacted]

1. What do you think is the purpose of school?
    a. Educate kids for their future
    b. System where they just put kids into school so no one fails in life
2. What makes a great teacher?
    a. Understandable
    b. Genuine→Actually wants you to learn
    c. Pure hearted
    d. Actually encourage you in a normal way
        i. Encourage in an authentic way
3. What is most important to you in a classroom?
4. What do you love about your school?
    a. The CSC
        i. Ability to take breaks
        ii. Helps kids get back on track
    b. Not love?
        i. Paychecks keeps kids in control
        ii. Parents don't understand them
        iii.
5. What does your school not have that you would like?
6. What is the most important factor contributing to you enjoying school?
    a. Memories and experience
        i. Good balance of learning and having fun
7. Do you feel like school is too hard, too easy, or just right?
    a. Just right→Can feel too much on top of
8. Advice
    a. Im comfortable with you and there is a boundary of respect
        i. Teacher students boundary
    b.
9. What do you think the purpose of HW is?
10. What is an enrichment/elective that interests you?

Questions for Students:-[redacted]

1. What do you think is the purpose of school?

Learn basic skills so you can survive
Figure out what you're good at
Sometimes it feels more about rules than learning

2. What makes a great teacher?
Actually notices when someone is confused
Explains things more than one way
Doesn't embarrass kids when they mess up

3. What is most important to you in a classroom?
Feeling safe to ask questions
Not being yelled at
Clear expectations

4. What do you love about your school?
Teachers who joke with us
Group projects when everyone participates

5. Not love?
Too many tests
People compare grades a lot

6. What does your school not have that you would like?
More hands-on learning
Classes about real life
Career exploration

7. What is the most important factor contributing to you enjoying school?
Teachers who care
Feeling successful at something

8. Do you feel like school is too hard, too easy, or just right?
Usually just right
Some classes feel pointless

9. What do you think the purpose of HW is?
Practice
Show responsibility
Sometimes feels like busy work

10. What is an enrichment/elective that interests you?
Engineering
Robotics

1. Questions for Students: [redacted]
   What do you think is the purpose of school?
   Prepare you for adulthood
   Teach you how to think
   Not just memorize
2. What makes a great teacher?
   Listens
   Respects students
   Has high expectations but explains why
3. What advice would you give to a struggling teacher?
   Ask students what's not working
   Don't take everything personally
4. What is most important to you in a classroom?
   Being respected
   Having a voice
   Clear routines
5. What do you love about your school?
   School spirit
   Assemblies
   Opportunities to lead
6. Not love?
   Discipline can feel unfair
   Different students get treated differently
7. What does your school not have that you would like?
   Student leadership opportunities for more people
   Peer mediation
8. What is the most important factor contributing to you enjoying school?
   Feeling heard
   Teachers believing in me
9. Do you feel like school is too hard, too easy, or just right?
   Just right academically
   Emotionally stressful sometimes
10. What do you think the purpose of HW is?
    Reinforce learning
    Prepare for tests
11. What is an enrichment/elective that interests you?
    Debate
    Public speaking

Questions for Students [redacted]
1. What do you think is the purpose of school?
Get knowledge

Learn discipline
Open doors later

2. What makes a great teacher?
Knows their subject
Explains clearly
Checks in with students

3. What is most important to you in a classroom?
Quiet when learning
Respect
Teachers being organized

4, What do you love about your school?
Friends
Sports
Teachers who care

5. Not love?
Too much sitting
Not enough movement

6. What does your school not have that you would like?
More PE options

7. What is the most important factor contributing to you enjoying school?
Feeling accomplished
Doing well on assignments

8. Do you feel like school is too hard, too easy, or just right?
Sometimes too easy
Want more challenge

9. What do you think the purpose of HW is?
Practice
Build habits

10. What is an enrichment/elective that interests you?
Sports science
Fitness

Attachments 1.4 B

Teacher Focus Group Summary

Stakeholder Focus Groups

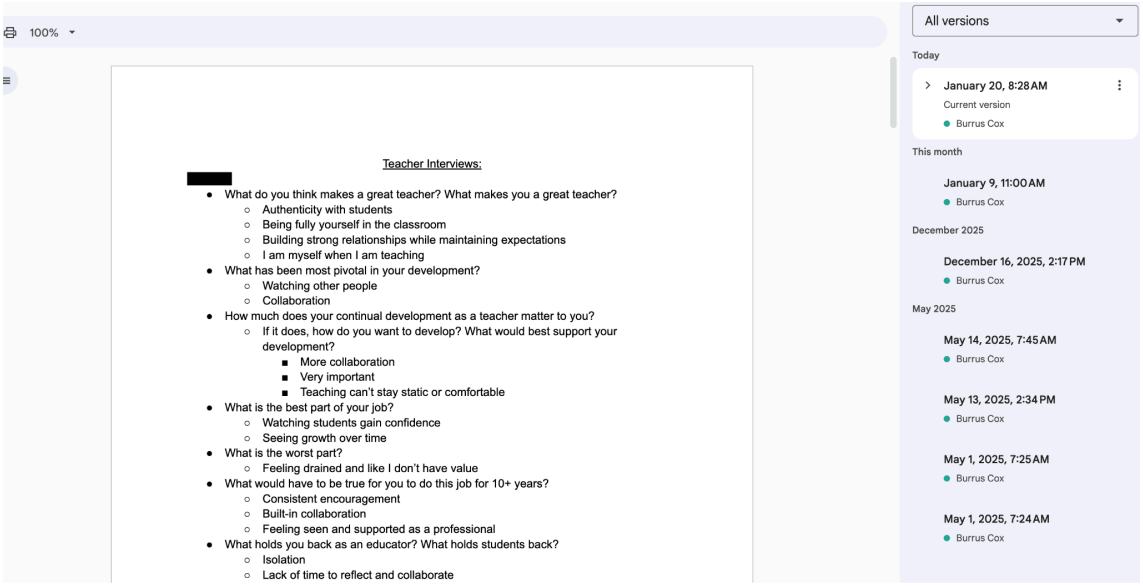
Evidence of Community Engagement

Teacher Interviews

Spring 2025

During Spring 2025, I conducted and documented a series of teacher interviews as part of my school design and planning work. I maintained contemporaneous notes capturing observations, reflections, and direct responses to interview questions. These notes were recorded in a Google Document and preserved with system-generated timestamps.

To support verification, screenshots of the document's version history are included, demonstrating authorship and creation dates during Spring 2025. The original interview notes are also included below.



Teacher Interviews:

[redacted]

- What do you think makes a great teacher? What makes you a great teacher?
    - Authenticity with students
    - Being fully yourself in the classroom
    - Building strong relationships while maintaining expectations
    - I am myself when I am teaching
- What has been most pivotal in your development?
    - Watching other people
    - Collaboration
- How much does your continual development as a teacher matter to you?
    - If it does, how do you want to develop? What would best support your development?
        - More collaboration
        - Very important
        - Teaching can't stay static or comfortable
- What is the best part of your job?
    - Watching students gain confidence
    - Seeing growth over time
- What is the worst part?
    - Feeling drained and like I don't have value
- What would have to be true for you to do this job for 10+ years?
    - Consistent encouragement
    - Built-in collaboration
    - Feeling seen and supported as a professional
- What holds you back as an educator? What holds students back?
    - Isolation
    - Lack of time to reflect and collaborate
- What is most important to you as an educator?
    - Student growth
    - Strong relationships
    - A sustainable professional life

[redacted]

- How do you view your role? What are your biggest priorities/responsibilities?
    - Shaping culture, not just enforcing behavior
    - Supporting teachers
    - Building systems that last
- What do you think has been the biggest contributing factor to your school building the culture it has?
    - Clear systems and routines
    - Consistent data tracking for recognition
    - Predictable rituals students can rely on

    - Strong house team leaders
    - High-quality teaching
- What has your school done most right from a culture standpoint?
    - Data tracking system for awards
    - Systems behind all of it
    - Kids know these rituals are coming
    - If they are random they aren't as impactful
    - Having strong house team leaders
    - Good teaching
- What do you think is the biggest area for growth in your school's culture?
    - Training of compass coaches
        - Learning about behavior triggers
        - How to descalate kids
        -
- What is your favorite part of your job/biggest challenge?
    - Supporting adults consistently while managing student needs
- What would be some advice you would give me for building a strong culture at my school?
    - Invest in systems early
    - Train leaders deeply
    - Don't rely on charisma or randomness
- What if I told you you had to do your job and teach 1 class a day? How do you feel? Is that possible? What would be the biggest challenge?
    - Possible, but challenging
    - Biggest challenge would be time and energy management
    - Would require strong systems and support

[redacted]

- What do you think makes a great teacher? What makes you a great teacher?
    - Clear communication
    - Strong content knowledge
    - Calm, consistent presence

- What has been most pivotal in your development?
    - Learning from veteran teachers
    - Watching effective classroom management
- How much does your continual development as a teacher matter to you?
    - Essential
    - Keeps teaching engaging

- If it does, how do you want to develop? What would best support your development?
    - Feedback tied to real classroom practice

    - Opportunities to observe peers

- What is the best part of your job?
    - Student confidence increasing over time

- What is the worst part?
    - Burnout
    - Emotional exhaustion

- What would have to be true for you to do this job for 10+ years?
    - Feeling valued
    - Reasonable workload
    - Collaboration built into the day

- What holds you back as an educator? What holds students back?
    - Too many competing priorities
    - Lack of consistent routines

- What is most important to you as an educator?
    - Student understanding
    - Long-term impact

[redacted]

What do you think makes a great teacher? What makes you a great teacher?

- High expectations paired with care
- Flexibility in instruction

What has been most pivotal in your development?

- Mentorship
- Watching others teach

How much does your continual development as a teacher matter to you?

- Very important
- Necessary to stay current

If it does, how do you want to develop? What would best support your development?

- Coaching that is specific and actionable
- Time to plan collaboratively

What is the best part of your job?

- Student “aha” moments

What is the worst part?

- Feeling like growth is rushed

What would have to be true for you to do this job for 10+ years?

- Clear growth pathways
- Strong professional community

What holds you back as an educator? What holds students back?

- Lack of alignment
- Gaps in foundational skills

What is most important to you as an educator?

- Mastery
- Confidence

[redacted]

- What do you think makes a great teacher? What makes you a great teacher?
    - Organization
    - Intentional planning
    - Responsiveness to students
- What has been most pivotal in your development?
    - Feedback from colleagues
    - Reflecting on student data
- How much does your continual development as a teacher matter to you?
    - Critical
    - Directly impacts student outcomes
- If it does, how do you want to develop? What would best support your development?
    - Data-informed coaching
    - Opportunities to refine practice
- What is the best part of your job?
    - Seeing students take ownership
- What is the worst part?
    - Administrative overload
- What would have to be true for you to do this job for 10+ years?
    - Clear systems
    - Trust in teacher judgment
- What holds you back as an educator? What holds students back?

    - Inconsistent expectations
    - Limited time for intervention
- What is most important to you as an educator?
    - Growth
    - Consistency

[redacted]

- What do you think makes a great teacher? What makes you a great teacher?
    - Passion for learning
    - Responsiveness to student needs
- What has been most pivotal in your development?
    - Learning from mistakes
    - Coaching conversations
- How much does your continual development as a teacher matter to you?
    - Essential
- If it does, how do you want to develop? What would best support your development?
    - Time for reflection
    - Ongoing mentorship
- What is the best part of your job?
    - Student growth
- What is the worst part?
    - Burnout
- What would have to be true for you to do this job for 10+ years?
    - Sustainable workload
    - Supportive culture
- What holds you back as an educator? What holds students back?
    - Time constraints
    - Gaps in foundational skills
- What is most important to you as an educator?
    - Mastery
    - Equity

Attachment 1.5: Experiential Camps and Classes

Evidence of Community Engagement

Contents of Attachments 1.5: Experiential Camps and Classes

- Attachment 1.5 A: AI Explorers Camp
- Attachment 1.5 B: Tutoring at Haynes Garden
- Attachment 1.5 C: Acting Workshop in partnership with Nashville Children's Theatre
- Attachment 1.5 D: Inquiry-Based Summer Camp

Attachments 1.5 A

AI Explorers Camp

Experiential Camps and Classes

Evidence of Community Engagement

AI EXPLORERS CAMP

Join The Gate School for an interactive, hands-on AI Literacy Camp designed to introduce students to the exciting world of artificial intelligence.

DATE: JANUARY 5TH
TIME: 8AM - 2PM
LOCATION: ENSWORTH SCHOOL

3RD AND 4TH GRADERS



STUDENTS WILL:

- Explore how AI works
- Create their own mini-projects
- Learn how technology can be used **responsibly** and creatively

Save your Spot!

For more details, visit:
www.thegateschool.org

CAMPAMENTO DE EXPLORADORES DE IA

Únete a The Gate School para un campamento interactivo y práctico de alfabetización en IA diseñado para introducir a los estudiantes al apasionante mundo de la inteligencia artificial.

FECHA: ENERO 5TH
TIEMPO: 8AM - 2PM
UBICACIÓN: ENSWORTH SCHOOL

3RD AND 4TH CALIFICADORES



LOS ESTUDIANTES:

- Explora cómo funciona la IA
- Crea tus propios miniproyectos
- Aprende a usar la tecnología de forma responsable y creativa

Guarda tu lugar!

Para obtener más detalles, visite:
www.thegateschool.org

مخيم مستكشفي الذكاء الاصطناعي

انضموا إلى مدرسة جيت في مخيم تفاعلي وعملي لمحو الأمية في الذكاء الاصطناعي، صُمم لتعريف الطلاب بعالم الذكاء الاصطناعي المثير.

التاريخ: 5 يناير

الوقت: من الساعة 8:00 صباحًا إلى 2:00 ظهرًا

الموقع: مدرسة إنسورث (ENSWORTH SCHOOL)

طلاب الصفين الثالث والرابع



سوف يقوم الطلاب بما يلي:

- استكشاف كيفية عمل الذكاء الاصطناعي
- إنشاء مشاريع صغيرة خاصة بهم
- التعرّف على كيفية استخدام التكنولوجيا بشكل مسؤول وإبداعي
-

احجز مكانك الآن!

للمزيد من التفاصيل، تفضل بزيارة:

www.thegateschool.org

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

The Gate School – AI Exploration Camp Student Survey

First Name: Elliott cofoid **Date:** 1/5/26 **Grade:** ■ 3rd □ 4th □ 5th

What I Learned About AI

1. Circle the best answer.
AI is:

- ☒ A computer that thinks like a human
- ■ A tool that learns from examples people give it
- ☒ A robot that makes its own decisions

2. True or False
AI can make mistakes.
■ True ☒ False

3. Finish the sentence.
One thing I understand better about AI now is that AI...

AI learns from humans.

My Experience Today

4. Which activity helped you learn the most about AI?
■ Training the AI with pictures
□ Building the catapult using AI
□ Making an AI image and story
□ All of them

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

5. Circle one.
Today's activities made me think hard.
● Yes □ A little □ Not really

6. Circle one.
I felt confident trying new things today.
□ Yes ● A little □ Not really

Looking Ahead

7. Finish the sentence.
One thing I liked about learning today was...
It can do a lot of stuff for your every day life

8. Circle one.
I would like to learn more about AI in school.
● Yes □ Maybe □ No

Thank you for learning with us today!

The Gate School AI Exploration Camp | January 2026

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

The Gate School – AI Exploration Camp Student Survey

First Name: Carter **Date:** Jan/5 **Grade:** ■ 3rd □ 4th □ 5th

What I Learned About AI

1. Circle the best answer.
AI is:

□ A computer that thinks like a human
■ A tool that learns from examples people give it
□ A robot that makes its own decisions

2. True or False
AI can make mistakes.
■ True □ False

3. Finish the sentence.
One thing I understand better about AI now is that AI…

learns from examples.

My Experience Today

4. Which activity helped you learn the most about AI?
□ Training the AI with pictures
■ Building the catapult using AI
□ Making an AI image and story
□ All of them

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

5. Circle one.
Today's activities made me think hard.
■ Yes □ A little □ Not really

6. Circle one.
I felt confident trying new things today.
■ Yes □ A little □ Not really

Looking Ahead

7. Finish the sentence.
One thing I liked about learning today was...
building the catapult.

8. Circle one.
I would like to learn more about AI in school.
■ Yes □ Maybe □ No

Thank you for learning with us today!

The Gate School AI Exploration Camp | January 2026

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

The Gate School – AI Exploration Camp Student Survey

First Name: Patch **Date:** 01/05/26 **Grade:** ☐ 3rd ☒ 4th ☐ 5th

What I Learned About AI

1. Circle the best answer.
AI is:

☐ A computer that thinks like a human
☑ A tool that learns from examples people give it
☐ A robot that makes its own decisions

2. True or False
AI can make mistakes.
☑ True ☐ False

3. Finish the sentence.
One thing I understand better about AI now is that AI...

only knows what people taught it.

My Experience Today

4. Which activity helped you learn the most about AI?
☑ Training the AI with pictures
☐ Building the catapult using AI
☐ Making an AI image and story
☐ All of them

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

5. Circle one.
Today's activities made me think hard.
☐ Yes ☑ A little ☐ Not really

6. Circle one.
I felt confident trying new things today.
☑ Yes ☐ A little ☐ Not really

Looking Ahead

7. Finish the sentence.
One thing I liked about learning today was...
we got to use computers while learning! :)

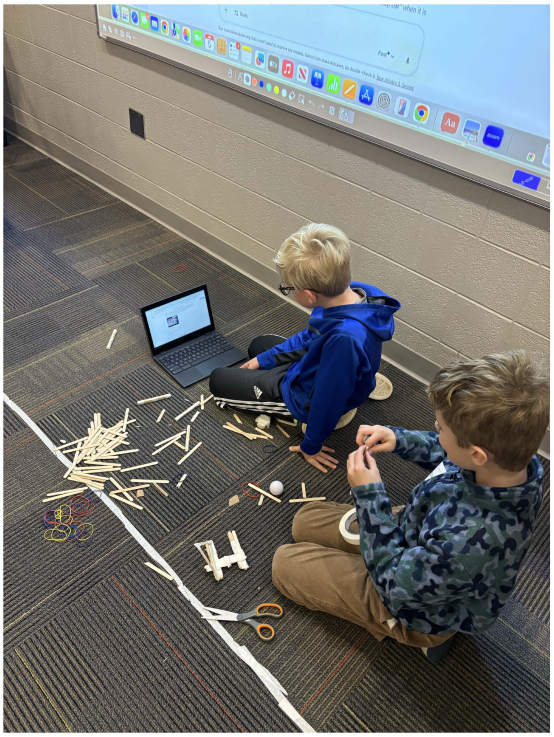
8. Circle one.
I would like to learn more about AI in school.
☑ Yes ☐ Maybe ☐ No

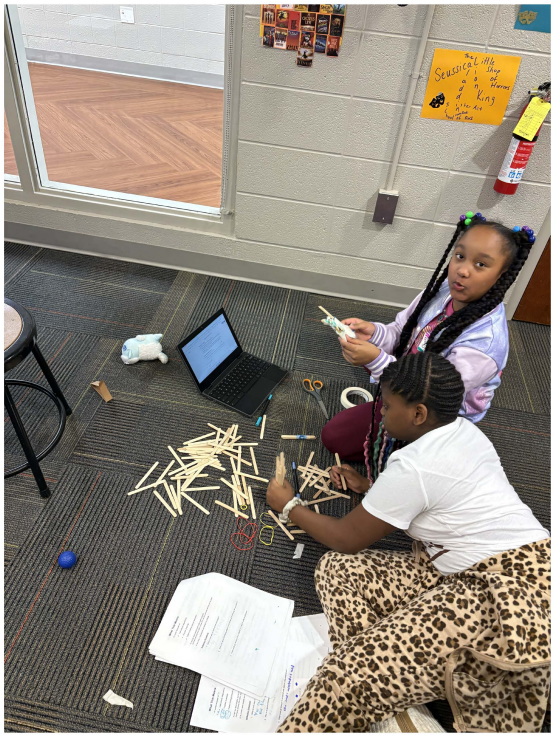
Thank you for learning with us today!

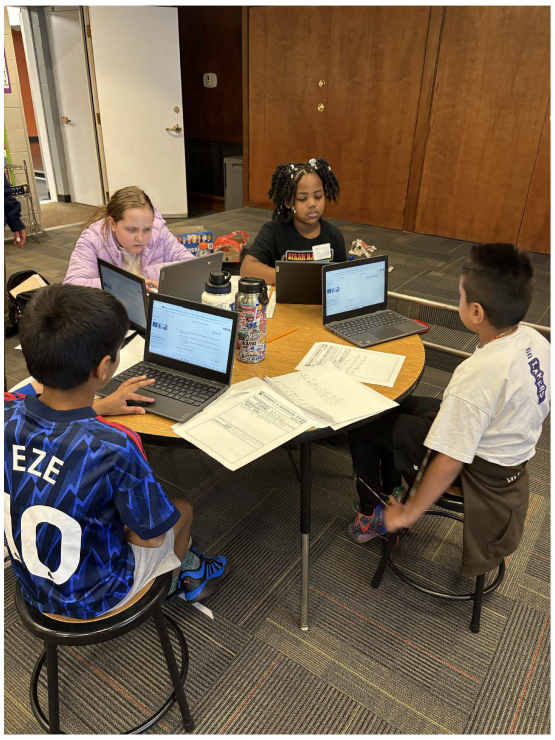
The Gate School AI Exploration Camp | January 2026



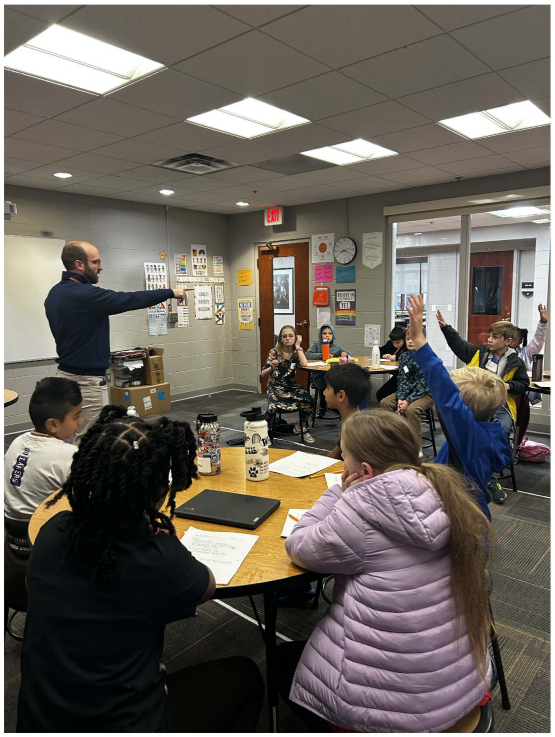

WELCOME ALL











Attachments 1.5 B

Tutoring at Haynes Garden

Experiential Camps and Classes

Evidence of Community Engagement

ATTACHMENTS

THE GATE
SCHOOL

Haynes Garden Tutoring: Spring 2026 onward
Free small group tutoring provided on-site at the Haynes Garden apartment complex, in partnership with Wonderfully Made Ministry. This program demonstrates TGS's commitment to meeting families where they live, building authentic relationships with students the school is designed to serve, and piloting instructional practices ahead of enrollment.

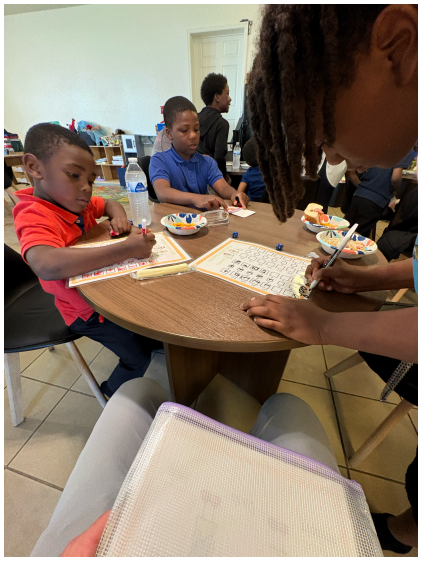
Please see attachment 1.8 A for a letter of support from DeeAnn Hodge,
Founder and Executive Director of Wonderfully Made Ministries











Attachments 1.5 C

Acting Workshop in partnership with Nashville Children's Theatre

Experiential Camps and Classes

Evidence of Community Engagement


THE GATE SCHOOL PRESENTS
AFTER SCHOOL ACTING WORKSHOP
FOR THIRD AND FOURTH GRADERS!
WEDNESDAY • APRIL 15TH • 4:00–5:00 PM
Nashville Childrens Theatre
NASHVILLE CHILDRENS THEATRE
(25 MIDDLETON ST, NASHVILLE, TN 37210)
Workshop is led by professional teaching artists from the Nashville Childrens Theatre.
Your child will:
• Build confidence and creativity
• Practice voice, movement, and imagination
• Learn through fun theater games and scene work
FREE EVENT SPONSORED
THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.
SIGN UP NOW — FREE, LIMITED SPOTS
LINK IN BIO





مدرسة ذا غيت تقدم

ورشة تمثيل
ورشة عمل في التمثيل

!الطلاب الصفين الثالث والرابع

أبريل 15 الأربعاء من الساعة 4:00 إلى الساعة

NASHVILLE CHILDRENS THEATRE
(25 MIDDLETON ST, NASHVILLE, TN 37210)

.يقود ورشة العمل فنانون تربويون محترفون من مسرح ناشفيل للأطفال

:سيقوم طفلك بـ

- عزّز الثقة والإبداع
- .تدرّب على الصوت والحركة والخيال
- .تعلّم من خلال الألعاب المسرحية الممتعة والعمل على المشاهد

فعالية مجانية برعاية

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

سجّل الآن — مجاناً، المقاعد محدودة
الرابط في البايو


THE GATE SCHOOL PRESENTA
TALLER DE ACTUACIÓN DESPUÉS DE CLASES
¡PARA ESTUDIANTES DE 3° Y 4° GRADO!
MIÉRCOLES 15 DE ABRIL 4:00–5:00 PM
Nashville Childrens Theatre
NASHVILLE CHILDREN'S THEATRE (25 MIDDLETON ST, NASHVILLE, TN 37210)
El taller es dirigido por artistas profesionales del Nashville Children's Theatre.
Su hijo/a:
Desarrollará confianza y creatividad
Practicará voz, movimiento e imaginación
Aprenderá a través de juegos teatrales divertidos y escenas
EVENTO GRATIS PATROCINADO
THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.
¡INSCRÍBETE YA — GRATIS, CUPOS LIMITADOS!
ENLACE EN LA BIO





Attachments 1.5 D

Inquiry-Based Summer Camp

Experiential Camps and Classes

Evidence of Community Engagement


Free!
THE GATE SCHOOL
SUMMER CAMP
RISING 4TH AND 5TH GRADERS
HOW DO WE KNOW?
A THINKING & DISCOVERY CAMP
June15th-
June 19th
9 am -
3pm
Encompass Community School
4300 Park Ave, Nashville, TN
Camp Highlights:
• Tackle big, mind-bending questions
• Take on high-energy thinking challenges
• Test ideas through real experiments
• Debate and defend ideas with evidence
Daily Structure
Mornings: Big questions + hands-on investigations
Afternoons: Building, creating, movement, and sharing
SAVE YOUR SPOT!
SEATS ARE LIMITED
FOR MORE DETAILS, VISIT:
WWW.THEGATESCHOOL.ORG


¡GRATIS!
LA ESCUELA DE LA PUERTA
CAMPAMENTO DE VERANO
alumnos que pasan a cuarto y quinto grado
¿Cómo lo sabemos?
Un campamento de pensamiento y descubrimiento
DEL 15 AL 19 DE JUNIO
DE 9:00 A 15:00
ESCUELA COMUNITARIA ENCOMPASS
4300 PARK AVE, NASHVILLE, TN 37211
Aspectos destacados del campamento
Abordar preguntas trascendentales y que desafían la mente
Pon a prueba tus ideas mediante experimentos reales
Afronta desafíos que requieren un pensamiento dinámico
Debatir y defender ideas con pruebas
ESTRUCTURA DIARIA
Mañanas: Grandes preguntas + investigaciones prácticas
Tardes: construir, crear, moverse y compartir
¡Guarda tu lugar!
Los asientos son limitados
Para obtener más detalles, visite:
www.thegateschool.org


har!
madrasat albawaaba
mukhayam sayfiun
altulaab almuntaqalun 'iilaa alsafayn alraabie walkhamis
kayf naerif dhalika?
mukhayam liltafkir waliaiktishaf
15-19
YUNIU
min alsaaeat
9 sbahaan
hataa alsaaeat
3 msa'an
madrasat 'iinkumbas almujtamaeia
4300 bark 'afinyu, nashfil, tinisi 37211
'abraz 'ahdath almueaskar
tanawul al'asyilat alkabirat walmuhayirat lileaql
akhtabar al'afkar min khilal tajarib haqiqia
khawd tahadiyat altafkir ealiat altaaqa
naqash al'afkar wadafae eanha bial'adila
alhaykal alyawmiu
alsabahi: 'asyilat muhimat + tahqiqat eamalia
fatrat ma baed alzuhra: albanaa'a, wal'iibdaei, walharakati, walmusharaka
ahfaz makanki!
almaqaeid mahduda
lilmazid min altafasili, tafadal biziarat almawqie al'iilikturuni:
www.thegateschool.org

The Gate School Summer Camp Sign Up (Responses) — Redacted

Timestamp	Parent/Guardian Name	Email:	Additional Email:	Phone Number:	Student(s) Name(s):	Student's Current School	Student's Grade:	Is there anything you'd like us to know about your child to help them have a great experience at camp?	How did you hear about our camp?
2/23/2026 11:11:36						Nolensville Elementary	Rising 4th		
3/1/2026 16:41:35						Glencliff Entrepreneurship STEAM Magnet Elementary School	Rising 5th		
3/9/2026 21:47:22						Andrew Jackson Elementary	Rising 4th	She has ADHD and is gifted so she's twice exceptional and very inquisitive	
3/9/2026 22:46:18						Lipscomb Academy	Rising 4th		
3/10/2026 8:43:48						Cane Ridge Elementary	Rising 4th	A very inquisitive kid with a thirst for knowledge.	
3/14/2026 11:40:51						Lipscomb Academy	Rising 4th		
3/21/2026 18:48:58						Harpeth Valley Elementary School	Rising 4th	Jacob is autistic - very intellectually bright, but he struggles with social skills sometimes	
3/22/2026 12:55:20						Gower elementary	Rising 5th	Loves STEM looking for more involved hands on summer experience	
3/23/2026 8:23:09						Harpeth Valley Elementary	Rising 5th		
3/23/2026 19:47:38						Gower	Rising 4th		
3/23/2026 20:56:43						Grower Elementary School	Rising 4th	N/A	
3/27/2026 16:31:00						Harpeth Valley Elementary	Rising 4th	Nope!	Website
3/29/2026 21:08:21						Westmeade	Rising 4th		Website
3/30/2026 10:56:56						Percy Priest Elementary	Rising 4th	Carter loves learning.	Word of Mouth
4/3/2026 14:54:17						Percy Priest Elementary	Rising 5th	Very curious, loves building!	Word of Mouth
4/4/2026 12:37:30						Gower Elementary	Rising 4th	He has a hard time making friends. He may act a bit awkward sometimes for attention, that may be	Word of Mouth
4/9/2026 23:36:47						Percy Priest Elementary	Rising 5th	Abel has been diagnosed with ADHD, depression, and potentially level 1 autism. He's on meds. But i	Word of Mouth
4/10/2026 23:57:45						Westmeade	Rising 4th		

Attachments 1.6

Summary of Prospective Talent Interest

Evidence of Community Engagement

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Prospective Educator Talent Profile Overview

The Gate School has engaged with a strong pool of experienced educators who have submitted resumes and expressed interest in the school's founding team. Collectively, this group represents **16 prospective educators**, with a median of 9 years of experience per educator, indicating a consistently seasoned talent pool.

Instructional Experience and Content Expertise

Prospective educators bring deep experience across core academic areas, including:

- **Mathematics (Grades 6–12)**, with significant middle school specialization
- **Science (Grades 6–8)**
- **Social Studies and History (Grades 6–8)**
- **English Language Arts (Grades 6-8)**
- **English Language Development**
- **Special Education**, including inclusion, co-teaching, and self-contained settings

Many have taught across multiple grade bands and instructional contexts, demonstrating flexibility and strong instructional judgment.

Support for Diverse Learners

Four of the educators hold **dual certifications** in Special Education and English Learner instruction. Several have completed graduate-level fellowships or specialized training focused on inclusive instruction and differentiation.

Leadership and School Culture Experience

Multiple educators have served in **formal school leadership roles**, including School Principal, Dean of Students, Assistant Principal, and Instructional Manager or Coach. These roles included responsibility for school culture, restorative practices, and instructional coaching, aligning with The Gate School's distributed leadership and teaching-firm model.

Professional Preparation and Alignment

The majority of prospective educators hold **Master's degrees** and all hold appropriate state licensure in their content or service areas. Several are certified in restorative and transformative justice, reinforcing alignment with the school's approach to discipline, belonging, and community building.

Overall, this prospective talent pool, anchored by **16 interested educators and a median of 9 years of experience**, reflects strong alignment with The Gate School's emphasis on instructional excellence, teacher leadership, and long-term staff retention.

Attachment 1.7: Community Events
Evidence of Community Engagement

Contents of Attachments 1.7: Community Events

- Attachment 1.7 A: Bellevue Community Center
- Attachment 1.7 B: McCrory Flats
- Attachment 1.7 C: PROPEL School Choice Fair
- Attachment 1.7 D: The Gate School at Tailgate
- Attachment 1.7 E: Holidays in the VUE Sponsorship
- Attachment 1.7 F: McCrory Community Dinner
- Attachment 1.7 G: Bellevue Community Picnic
- Attachment 1.7 H: Summer Kickoff Event
- Attachment 1.7 I: Schrader Lane Youth and Family Task Force Event

Attachments 1.7 A

Bellevue Community Center

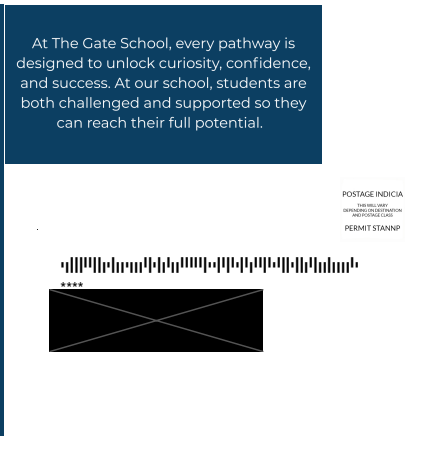
Community Events

Evidence of Community Engagement

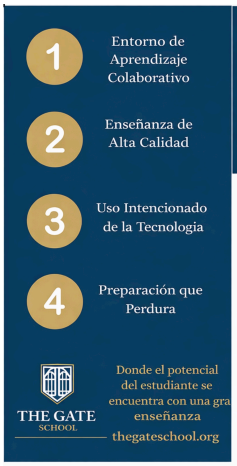

Join us for a
NIGHT OF LEARNING
— ABOUT —
THE GATE SCHOOL
THE GATE
SCHOOL
WHEN:
January 15th
6:00 - 7:00 PM
WHERE:
Bellevue
Community Center
FREE DINNER PROVIDED!
Learn about our proposed public middle school coming to Nashville—a place where students will be challenged, supported, and prepared for high school.
All are welcome!

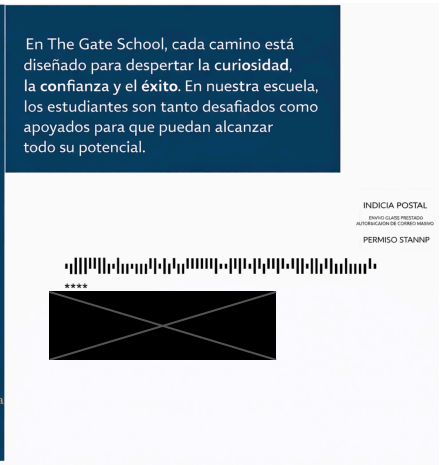

Join us for a night of learning about The Gate School
THE GATE
SCHOOL
WHERE?
Bellevue Community Center
WHEN?
January 15th
6:00-7:00 PM
FREE DINNER PROVIDED
The Gate School is a proposed public middle school that gives Nashville students the challenge, support, and teaching they deserve. Through discussion-based and inquiry-driven learning, students build confidence, communication, and deep thinking. With excellent teachers, purposeful AI use, and a warm, structured community, The Gate School prepares every student for high school and beyond.


1 Collaborative Learning Environment
2 High Quality Teaching
3 Purposeful of Technology
4 Preparation that Lasts
THE GATE SCHOOL
Where student potential meets great teaching
thegateschool.org


At The Gate School, every pathway is designed to unlock curiosity, confidence, and success. At our school, students are both challenged and supported so they can reach their full potential.
POSTAGE INDICIA
PERMIT STANNP
****


Acompáñanos en una noche para conocer más sobre The Gate School
THE GATE
SCHOOL
WHERE?
Centro Comunitario de Bellevue
WHEN?
15 de enero
6:00–7:00 p. m.
FREE DINNER PROVIDED
The Gate School es una escuela pública de nivel intermedio propuesta que ofrece a los estudiantes de Nashville el reto, el apoyo y la enseñanza que merecen. A través de un aprendizaje basado en la discusión y la indagación, los estudiantes desarrollan confianza, habilidades de comunicación y pensamiento profundo. Con docentes de alta calidad, un uso intencional de la inteligencia artificial y una comunidad cálida y estructurada, The Gate School prepara a cada estudiante para la escuela secundaria y más allá.


1 Entorno de Aprendizaje Colaborativo
2 Enseñanza de Alta Calidad
3 Uso Intencionado de la Tecnología
4 Preparación que Perdura
THE GATE SCHOOL
Donde el potencial del estudiante se encuentra con una gra enseñanza
thegateschool.org


En The Gate School, cada camino está diseñado para despertar la curiosidad, la confianza y el éxito. En nuestra escuela, los estudiantes son tanto desafiados como apoyados para que puedan alcanzar todo su potencial.
INDICIA POSTAL
PERMISO STANNP
****


انضموا إلينا لقضاء أمسية للتعرّف على مدرسة جيت
THE GATE
SCHOOL
WHERE?
مركز بلفيو المجتمعي (Bellevue Community Center)
WHEN?
يناير 15
من الساعة 6:00 مساءً
إلى 7:00 مساءً
يتم توفير عشاء مجاني
مدرسة جيت هي مدرسة عامة مقترحة للمرحلة المتوسطة تهدف إلى تقديم التحدي والدعم والتعليم الذي يستحقه طلاب ناشفيل. ومن خلال التعلّم القائم على الحوار والاستقصاء، يطوّر الطلاب الثقة بالنفس، ومهارات التواصل، والتفكير العميق. وبفضل معلمين متميزين، واستخدام هادف للذكاء الاصطناعي، ومجتمع مدرسي دافئ ومنظّم، تُعدّ مدرسة جيت كل طالب للنجاح في المرحلة الثانوية وما بعدها.


1 بيئة تعلم تعاونية
2 تعليم عالي الجودة
3 استخدام هادف للتكنولوجيا
4 إعداد يدوم طويلاً
مدرسة جيت
حيث تلقي امكانات الطلاب مع التعليم المتميز
thegateschool.org


في درسة جيت، صممت كل مسارات التعليم لكتشاف الفصول والنفة والنجاح. في مدرسنا، في مدرستا لقلب يتفى اللبرب الدعم والندبهم لمكينهم من تخفق إمكاناتهم الكاملة.
طباعة البريد
****

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Jason Coleman Zip Code: 37221

Email: [redacted] Date: 1/15/26

Child's Grade: 4, 3, K

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit		✓		
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)		✓		
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate			✓	
World Languages		✓		
Extracurricular Activities			✓	
Social Emotional Learning			✓	

What are the top 3 things that middle schools in Nashville could do better?

1. Academics
2. Safety
3. Extra-curriculars

Do you support The Gate School opening as a free public charter school in Davidson County?

- [x] YES
- [ ] NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

- [x] YES
- [ ] NO

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Brandy Mapes Zip Code: 37209

Email: [redacted] Date: 1/15/26

Child's Grade: 2nd & 3rd

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				✓
MS students earning High School Credit		✓		
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)		✓		
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				
World Languages			✓	
Extracurricular Activities		✓		
Social Emotional Learning				✓

What are the top 3 things that middle schools in Nashville could do better?

1. curriculum could be better geared toward critical thinking
2. Class sizes
3. consistent teacher quality

Do you support The Gate School opening as a free public charter school in Davidson County?

- [x] YES
- [ ] NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

- [x] YES
- [ ] NO

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Laura Jones Zip Code: 37221

Email: [redacted] Date: 1/15/26

Child's Grade: 1st + 3rd

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				✓
MS students earning High School Credit			✓	
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)			✓	
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate			✓	
World Languages				✓
Extracurricular Activities				✓
Social Emotional Learning				✓

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Daniel Morgan Zip Code: 37221

Email: [redacted]com Date: 1/15/26

Child's Grade: 4th and 2nd

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				X
MS students earning High School Credit			X	
Top Quality Teachers				X
Students learning how to use AI (safely & ethically)		X		
Teaching students how to effectively communicate				X
Teaching students how to effectively collaborate				X
World Languages		X		
Extracurricular Activities				X
Social Emotional Learning			X	

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Chad + Emily Humbert Zip Code: 37221

Email: [redacted] Date: 1/15/26

Child's Grade: 4th (and 5th)

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				✓
MS students earning High School Credit			✓	
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)			✓	
Teaching students how to effectively communicate			✓	
Teaching students how to effectively collaborate			✓	
World Languages			✓	✓
Extracurricular Activities				✓
Social Emotional Learning			✓	

What are the top 3 things that middle schools in Nashville could do better?

1. make kids excited about learning

2. ensuring kids are challenged without mountains of homework so they can still be kids

3. Computer use being intentional

Do you support The Gate School opening as a free public charter school in Davidson County?

- [x] YES
- [ ] NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

- [x] YES
- [ ] NO


THE GATE
SCHOOL
Shaping
Leaders

Attachments 1.7 B

McCrory Flats

Community Events

Evidence of Community Engagement



THE GATE SCHOOL

Join us for a family-friendly evening with **free dinner,** conversation, and community as we dream about what middle school can be.

First 20 families get a free gift card!!

December 9th

6:00 pm - 7:00 pm

McCrory Flats
8121 McCrory Ln, Nashville, TN 37221

RSVP for the Event:

Free Public Charter Middle School Opening in the Fall of 2027. Learn More at www.thegateschool.org



THE GATE SCHOOL

انضموا إلينا لقضاء أمسية عائلية ممتعة مع عشاء مجاني، وحوار مفتوح، وروح مجتمعية، بينما نتخيّل معًا كيف يمكن أن تكون المرحلة المتوسطة.



أول 20 عائلة ستحصل على بطاقة هدايا مجانية!

يرجى تأكيد الحضور للفعالية:

ديسمبر 9

من الساعة 6:00 مساءً إلى 7:00 مساءً

مساكن مكروري فلاتس (McCrory Flats)
8121 شارع مكروري، ناشفيل، تينيسي 37221

مدرسة عامة ميثاقية (تشارتر) مجانية للمرحلة المتوسطة ستُفتتح في خريف عام 2027. تعرّفوا على المزيد عبر الموقع: www.thegateschool.org

THE GATE SCHOOL





Únase a nosotros para una tarde familiar con cena gratuita, conversación y comunidad mientras soñamos juntos sobre lo que la escuela intermedia puede llegar a ser.

Diciembre 9th

6:00 pm - 7:00 pm

McCrory Flats
8121 McCrory Ln, Nashville, TN 37221

Confirma tu asistencia al evento:

Escuela secundaria pública gratuita abrirá sus puertas en otoño de 2027. Más información en www.thegateschool.org




SCAN HERE
THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.





THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Miracle Jude **Zip Code:** 37221

Email: [redacted] **Date:** 12-9-25

Child's Grade: 2nd

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			X	
MS students earning High School Credit			X	
Top Quality Teachers				X
Students learning how to use AI (safely & ethically)		X		
Teaching students how to effectively communicate				X
Teaching students how to effectively collaborate			X	
World Languages			X	
Extracurricular Activities			X	
Social Emotional Learning			X	

What are the top 3 things that middle schools in Nashville could do better?

1. Engaging with the kids more
2. One on one teaching
3. Being patient

Do you support The Gate School opening as a free public charter school in Davidson County?

- [x] YES
- [ ] NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

- [x] YES
- [ ] NO

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Britney S. **Zip Code:** 37221

Email: [redacted] **Date:** 12-10-25

Child's Grade: 1st grade

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			X	
MS students earning High School Credit				X
Top Quality Teachers				X
Students learning how to use AI (safely & ethically)				X
Teaching students how to effectively communicate				X
Teaching students how to effectively collaborate				X
World Languages			X	
Extracurricular Activities			X	
Social Emotional Learning				X

/hat are the top 3 things that middle schools in Nashville could do etter?

1. focus on equality (everyone is equal)
2. [redacted] build more pathways for future jobs/careers
3. focus on mental Health.

Do you support The Gate School opening as a free public charter school in Davidson County?

☒ YES
☐ NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

☒ YES
☐ NO

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Ja'krya webster **Zip Code:** 37221

Email: [redacted] **Date:** 12/09/25

Child's Grade: 1st

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				✓
MS students earning High School Credit				✓
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)				✓
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				✓
World Languages				✓
Extracurricular Activities				✓
Social Emotional Learning				✓

What are the top 3 things that middle schools in Nashville could do better?

1. Education

2. Location

3. Bus route

Do you support The Gate School opening as a free public charter school in Davidson County?

- [x] YES
- [ ] NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

- [x] YES
- [ ] NO

Attachments 1.7 C

PROPEL School Choice Fair

Community Events

Evidence of Community Engagement


Nashville PROPEL Presents:
BOOTS ON THE GROUND
PUBLIC SCHOOL CHOICE
FAIR
LIFTING EVERY SCHOOL; EMPOWERING EVERY PARENT
FREE EVENT
Fun for the whole family!
SATURDAY, NOV 15th
10:30AM-3:00PM
Casa De Dios USA
3030 Dickerson Pike
Nashville, TN 37207
PARADE OF SCHOOLS STARTS @10:30 AM
PUBLIC SCHOOL CHOICE FAIR STARTS @11:30 AM
JOIN US AS WE CELEBRATE HIGH PERFORMING SCHOOLS AND ENGAGE WITH COMMUNITY PARTNERS/RESOURCES!


Nashville PROPEL Presenta:
OPCIONES DE ESCUELAS PÚBLICAS EN LA COMUNIDAD
FERIA
ELEVANDO CADA ESCUELA; EMPODERANDO A CADA FAMILIA
EVENTO GRATUITO
Diversión para toda la familia
SÁBADO, NOV 15th
10:30AM-3:00PM
Casa De Dios USA
3030 Dickerson Pike
Nashville, TN 37207
DESFILE DE ESCUELAS @10:30 AM
FERIA DE OPCIONES ESCOLARES @11:30 AM
¡ACOMPÁÑANOS A CELEBRAR A LAS ESCUELAS PÚBLICAS DE ALTO RENDIMIENTO Y CONECTARTE CON RECURSOS Y ALIADOS DE LA COMUNIDAD!

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Brauer Jones Zip Code: 22206

Email: [redacted] Date: 11/15/2023

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 5 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit			✓	
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)				✓
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				✓
World Languages				✓
Extracurricular Activities				✓
Social Emotional Learning				✓

What are the top 3 things that middle schools in Nashville could do better?

1. Improve security of schools.
2. Meet Dietary Needs of every student.
3. Be Inclusive to parents when they have new initiatives for improvement

Do you support The Gate School opening as a free public charter school in Davidson County?

- ☑ YES
- ☐ NO

(Optional) Anything else you'd like to share about what you'd like to see in a Middle School in Nashville?

Nope.

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Zy Taylor **Zip Code:** 37206

Email: [redacted] **Date:** 11-15-2025

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 5 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				✓
MS students earning High School Credit				✓
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)			✓	
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				✓
World Languages				✓
Extracurricular Activities				✓
Social Emotional Learning				✓

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Ralonda Gooch Zip Code: 37218

Email: [redacted] Date: 11/15/2025

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 5 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit			✓	
Top Quality Teachers			✓	
Students learning how to use AI (safely & ethically)				✓
Teaching students how to effectively communicate			✓	
Teaching students how to effectively collaborate			✓	
World Languages			✓ Spanish	
Extracurricular Activities			✓	
Social Emotional Learning			✓	

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Alicia Frierson Zip Code: 37209

Em [redacted] Date: 11/15/2025

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 5 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit			✓	
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)			✓	
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				✓
World Languages				✓
Extracurricular Activities				✓
Social Emotional Learning				✓


THE GATE


LEAD PUBLIC SCHOOLS IS
TRANSFORMING
THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.



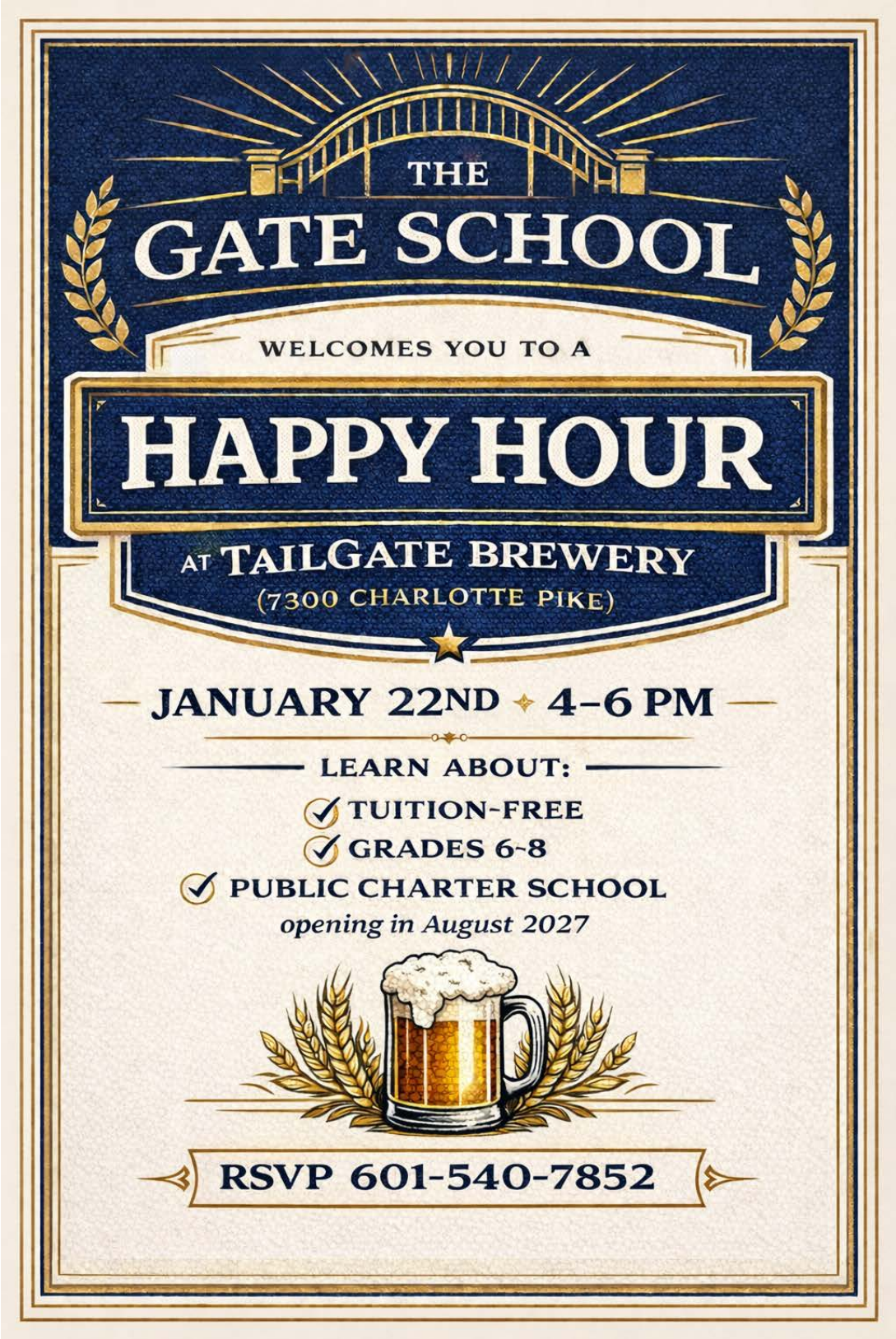


Attachments 1.7 D

The Gate School at Tailgate

Community Events

Evidence of Community Engagement


THE
GATE SCHOOL
WELCOMES YOU TO A
HAPPY HOUR
AT TAILGATE BREWERY
(7300 CHARLOTTE PIKE)
JANUARY 22ND • 4–6 PM
LEARN ABOUT:
TUITION-FREE
GRADES 6-8
PUBLIC CHARTER SCHOOL
opening in August 2027
RSVP 601-540-7852

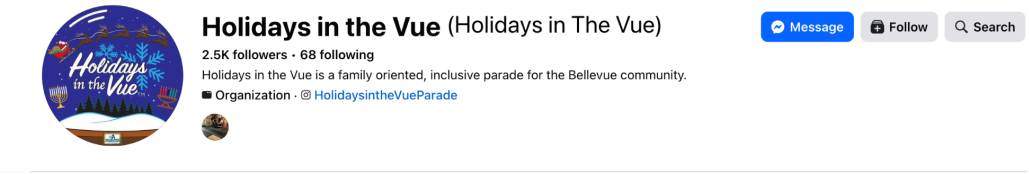
Attachments 1.7 E

Holidays in the VUE Sponsorship

Community Events

Evidence of Community Engagement


Thank You to Our Sponsors
TwelveStone INFUSION CENTER
ALLEGIANCE PRESSURE WASHING
"Pledged To Excellence"
Harmony at Bellevue
JASON SPAIN
AMERICAN
PLAYERS
CALEB HEMMER
NASHVILLE CHRISTIAN SCHOOL
CLARENDALE BELLEVUE PLACE
Moore & Moore
EXCHANGE
TOA
TriStar Bellevue ER
MCNEELY BROCKMAN
TENCU Banking for You
CenterWell Senior Primary Care
storelocal
burn
Advance FINANCIAL Foundation
Vulcan
Bellevue Harpeth
THE GATE
SHERI WEINER
StateFarm BETHANY HARBIN


Holidays in the Vue (Holidays in The Vue)
Message
Follow
Search
2.5K followers · 68 following
Holidays in the Vue is a family oriented, inclusive parade for the Bellevue community.
Organization · HolidaysintheVueParade


Holidays in the Vue is with Plantation Pub.
November 17, 2025 ·
Another round of Digital Sponsors! We truly couldn't do it without you. Thank you for supporting our dream of continuing to bring the Holidays in the Vue Parade to Bellevue.
NOBLE'S
CENTRAL NASHVILLE
BELLEVUE'S
PLANTATION
PUB

Attachments 1.7 F

McCrory Community Dinner

Community Events

Evidence of Community Engagement

THE GATE
SCHOOL

Community Event



APRIL 9TH | 6:00-7:00

8200 McCrory Ln, Nashville, TN 37221

Join us for a family-friendly evening with FREE dinner, conversation, and community as we dream about what middle school can be.

- Learn About The School
- Family-Friendly
- Free Dinner
- Free T-Shirt

Contact Us for any questions!

Phone Number
615-330-8495

Website
thegateschool.org

RSVP TODAY!



Evento Comunitario



9 DE ABRIL | 6:00-7:00

8200 McCrory Ln, Nashville, TN 37221

Acompáñenos a una velada en familia con cena gratis, conversación y comunidad mientras imaginamos lo que puede ser la escuela media.

- Conoce la Escuela
- Para Toda la Familia
- Cena Gratis
- Participación Comunitaria

¡Contáctenos con cualquier pregunta!

Teléfono
Agregue Número Aquí

Sitio Web
thegateschool.org

¡CONFIRME HOY!


THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.
فعالية مجتمعية
أبريل | 9 7:00-6:00
8200 McCrory Ln, Nashville, TN 37221
انضموا إلينا في أمسية عائلية مع عشاء مجاني ومحادثة ومجتمع بينما نحلم بما يمكن أن تكون عليه المدرسة المتوسطة.
تعرّفوا على المدرسة
مناسب للعائلة
عشاء مجاني
مشاركة مجتمعية
تواصلوا معنا لأي أسئلة!
رقم الهاتف
أضف الرقم هنا
الموقع الإلكتروني
thegateschool.org
أكدوا حضوركم اليوم!


THE GATE
SCHOOL
THE GATE
SCHOOL
THE GATE

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Darnell Jackson **Zip Code:** 37221

Email: [redacted] **Date:** 4/9/26

Child's Grade: 2nd, 4th & 7th

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit				✓
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)				✓
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				✓
World Languages				✓
Extracurricular Activities				✓
Social Emotional Learning				✓

What are the top 3 things that middle schools in Nashville could do better?

1. Include more extracurricular classes that help prepare us for real world activities... ie (cooking class, mechanics...)
2. More technology based learning, since that's where the world is heading.
3.

Do you support The Gate School opening as a free public charter school in Davidson County?

☑ YES
☐ NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

☑ YES
☐ NO

THE GATE SCHOOL

WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Patricka Daly **Zip Code:** 37221

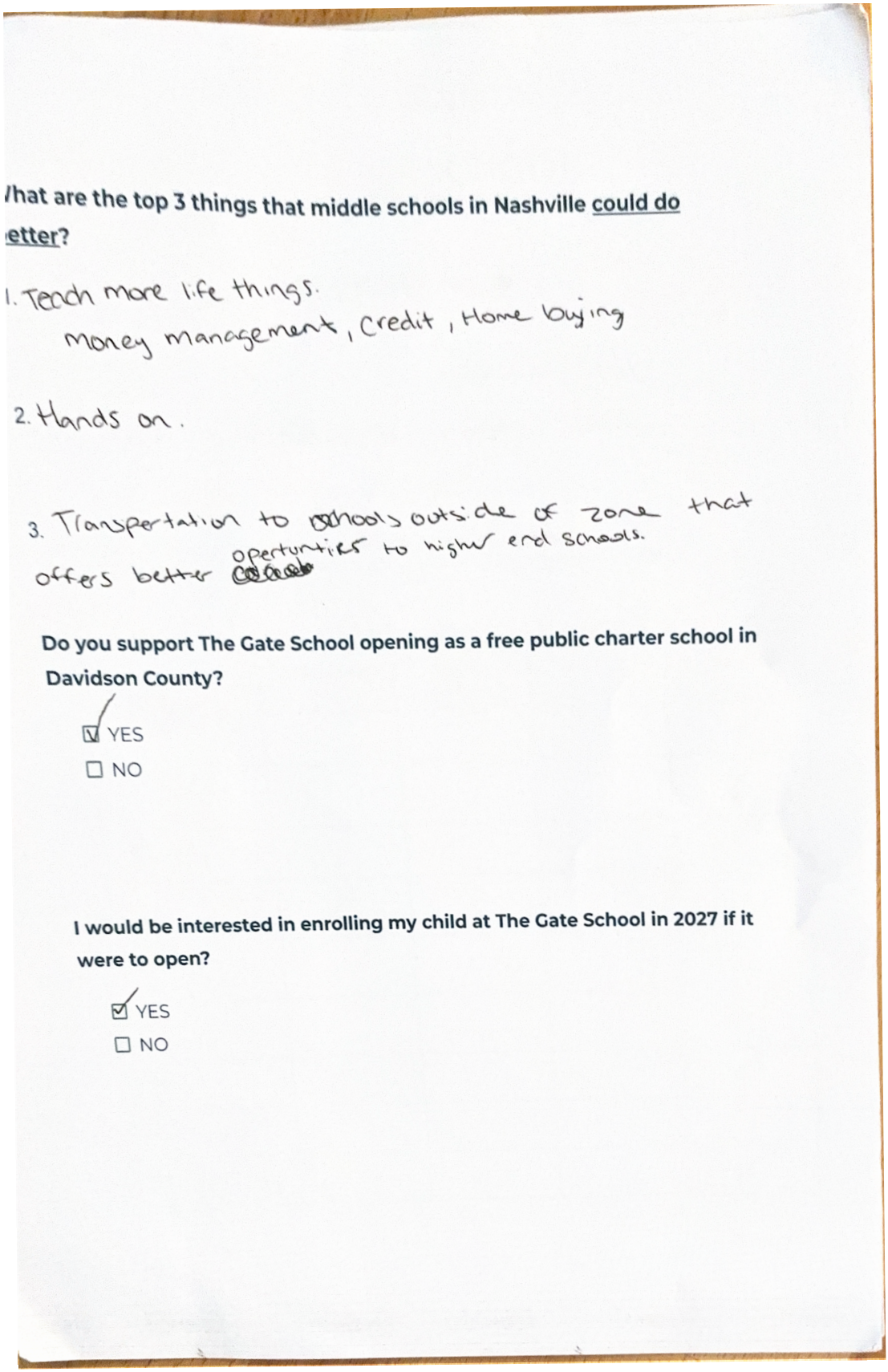
Email: [redacted] **Date:** 4/9/2026

Child's Grade: K, 5th, 6th

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				✓
MS students earning High School Credit		✓		✓
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)	✓			
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				✓
World Languages				✓
Extracurricular Activities				✓
Social Emotional Learning				✓



/hat are the top 3 things that middle schools in Nashville could do etter?

1. Teach more life things.
   Money management, Credit, Home buying

2. Hands on.

3. Transportation to schools outside of zone that offers better opertunities to higher end schools.

Do you support The Gate School opening as a free public charter school in Davidson County?

☑ YES
☐ NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

☑ YES
☐ NO

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: LaToya Barefield **Zip Code:** 32221

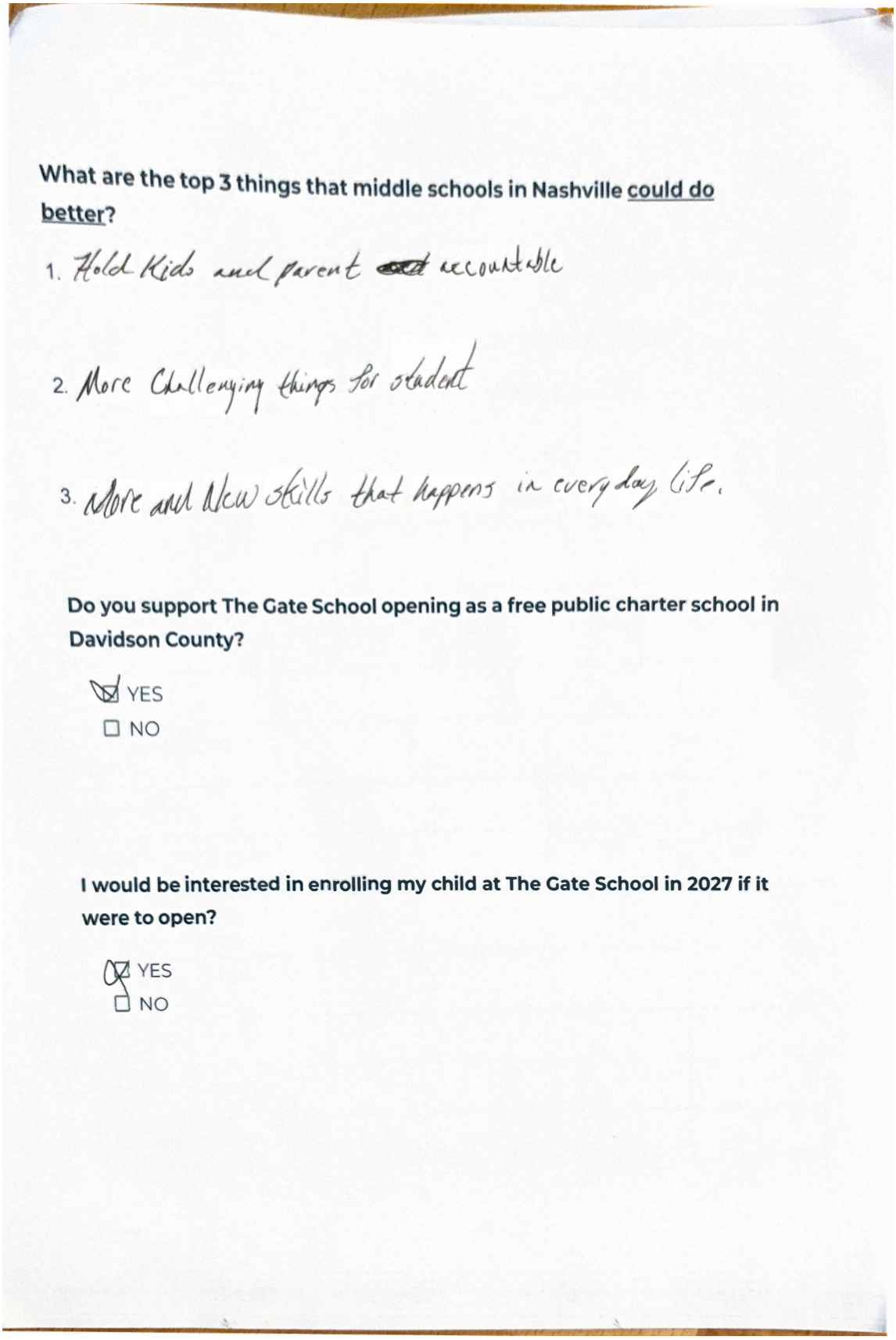
Email: [redacted] **Date:** 4/9/26

Child's Grade: 1st

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit				✓
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)				✓
Teaching students how to effectively communicate				✓
Teaching students how to effectively collaborate				✓
World Languages				
Extracurricular Activities			✓	
Social Emotional Learning				✓



What are the top 3 things that middle schools in Nashville could do better?

1. Hold Kids and parent ~~~~ accountable

2. More Challenging things for student

3. More and New skills that happens in everyday life.

Do you support The Gate School opening as a free public charter school in Davidson County?

☒ YES
☐ NO

I would be interested in enrolling my child at The Gate School in 2027 if it were to open?

☒ YES
☐ NO

Attachments 1.7 G

Bellevue Community Picnic

Community Events

Evidence of Community Engagement


2026 VENDOR
Bellevue Harpeth
CHAMBER OF COMMERCE
BELLEVUE COMMUNITY PICNIC
MAY 16, 2026
47th ANNUAL
11 AM THE FUN BEGINS
FIREWORKS AT 9 PM!
presenting sponsor
NASHVILLE CHRISTIAN SCHOOL


THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING


WE CU
Maria
BREWER

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Stacey Smith Zip Code: 37205

Email: [redacted]com Date: 05/16/26

Child's Grade: Upcoming 4th

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit		✓		
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)		✓		
Teaching students how to effectively communicate			✓	
Teaching students how to effectively collaborate				✓
World Languages			✓	
Extracurricular Activities			✓	
Social Emotional Learning			✓	

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: LOGAN WRIGHT Zip Code: 37221

Email: [redacted] Date: 5/16/26

Child's Grade: RISING 5TH

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning				✓
MS students earning High School Credit			✓	
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)			✓	
Teaching students how to effectively communicate			✓	
Teaching students how to effectively collaborate			✓	
World Languages		✓		
Extracurricular Activities		✓		
Social Emotional Learning			✓	

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Family Feedback Survey

Name: Hilal Zip Code: 37221

Email: [redacted] Date: 05/16/26

Child's Grade: 8th, 6th & 4th

How important are these to you for middle school students?

- *Please check the box that best describes the level of importance (1 - not at all important → 4 very important)*

	1 Not important	2 Slightly important	3 Important	4 Very important
Rigorous Learning			✓	
MS students earning High School Credit			✓	
Top Quality Teachers				✓
Students learning how to use AI (safely & ethically)		✓		
Teaching students how to effectively communicate			✓	
Teaching students how to effectively collaborate			✓	
World Languages		✓		
Extracurricular Activities			✓	
Social Emotional Learning			✓	

Attachments 1.7 H

Summer Kickoff Event

Community Events

Evidence of Community Engagement


SUMMER
KICKOFF
2026
FREE SNOW CONES +
SUMMER ACTIVITY KITS
Date
JUNE 6TH
Time
3-4PM
FREE
While supplies last
Activities
Cool off with us
Grab an activity kit
Celebrate the start of summer together
Richland Park
4601 Charlotte Pike,
Nashville, TN 37209
Registration Link
www.thegateschool.org
More Information 615-330-8495
THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.







INICIO DEL VERANO

2026

CONOS DE NIEVE GRATIS + KITS DE ACTIVIDADES DE VERANO

Date
JUNE 6TH

Time
3-4PM

FREE
While supplies last

Activities
- Refrescarse con nosotras
- Toma un kit de actividades.
- Celebren juntos el comienzo del verano.

Richland Park
4601 Charlotte Pike,
Nashville, TN 37209

Registration Link
www.thegateschool.org

Más información 615-330-8495

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.







انطلاقة الصيف 2026

أقماع ثلج مجانية + مجموعات أنشطة صيفية

Date
JUNE 6TH

Time
3-4PM

حر
While supplies last

Activities

- انتعش معنا
- احصل على مجموعة أنشطة
- احتفلوا ببداية الصيف معاً.

Richland Park

4601 Charlotte Pike,
Nashville, TN 37209

رابط التسجيل
www.thegateschool.org

More Information 615-330-8495

THE GATE SCHOOL
WHERE STUDENT POTENTIAL MEETS GREAT TEACHING.

Attachments 1.7 I

Schrader Lane Youth and Family Task Force Event

Community Events

Evidence of Community Engagement

From: **Stephanie Richey** stephanierichey3@gmail.com
Subject: SAVE THE DATE - Youth & Family Summit – August 1, 2026
Date: April 20, 2026 at 8:06 PM
To: Stephanie Richey stephanierichey3@gmail.com
Bcc: burrus@thegateschool.org

SR

Dear Community Partner,

The Schrader Lane Youth Task Force is pleased to invite your agency to participate in our **Youth and Family Summit**, to be held on **Saturday, August 1, 2026**.

This year's summit promises to enrich both youth and families within our community, and we believe your organization would bring a wealth of knowledge and expertise through your work. Participation will also offer a valuable opportunity for your agency to connect with other like-minded organizations dedicated to strengthening and supporting our community.

Our theme for this year's event is **"Deep Conversations,"** and we are especially excited to collaborate with **Deep Dish Conversations** to facilitate a **live podcast with our youth**, creating a space for authentic dialogue, shared learning, and meaningful engagement.

We invite your agency to take part by hosting an **information table** to share resources, services, and insights with attendees. But, we also invite you to promote your presence at this event.

If your organization is interested in participating, please respond at your earliest convenience. For additional information, you may contact our Task Force Chairperson:

Stephanie Richey
📞 (615) 969-7113


Schrader Lane Youth Task Force's
YOUTH & FAMILY SUMMIT
DEEP CONVERSATIONS
SATURDAY, AUGUST 1, 2026
9:00 AM – NOON
FREE & OPEN TO THE COMMUNITY!
SCHRADER LANE CHURCH OF CHRIST
1234 Schrader Lane, Nashville, TN 37208

Attachment 1.8: Letters of Support

Evidence of Community Engagement

Contents of Attachments 1.8: Letters of Support

- Attachment 1.8 A: Community Organizations
- Attachment 1.8 B: Schools and Universities
- Attachment 1.8 C: Students
- Attachment 1.8 D: Families
- Attachment 1.8 E: Co-Workers
- Attachment 1.8 F: Facility Partners

Attachments 1.8 A

Community Organizations

Letters of Support

Evidence of Community Engagement

TECA
TENNESSEE EDUCATORS of COLOR ALLIANCE

January 11 2026

Charter School Approval Committee
Nashville, TN

Dear Members of the Committee,

I am writing to express my strong support for **The Gate School** as it seeks approval to serve students in Nashville. As Interim Executive Director of the Tennessee Educational Charter Alliance (TECA), I have seen firsthand the transformative impact that high-quality, innovative schools can have on students' academic success and personal growth.

The Gate School's commitment to creating a rigorous, student-centered learning environment aligns closely with TECA's mission to expand access to excellent educational opportunities across the state. By focusing on individualized instruction, strong academic standards, and fostering critical thinking skills, The Gate School has the potential to positively impact students and families in our community for years to come.

TECA proudly supports The Gate School and encourages the committee to approve their application. We are confident that this school will make a meaningful contribution to Nashville's educational landscape and provide students with the tools and resources they need to thrive.

Sincerely,

Dr. Shawn Boyd

Interim Executive Director

Tennessee Educational Charter Alliance (TECA)

Y·E·S
YOUTH ENCOURAGEMENT SERVICES

To Whom It May Concern:

I am writing to express my strong support for The Gate School and to share why I chose to join its Board. My decision is rooted in both my professional commitment to youth development and my personal investment in the future of our community.

As the Executive Director of Youth Encouragement Services (YES), I have spent years working alongside children and families from some of Nashville's most historically underinvested neighborhoods. For more than 70 years, YES has provided a safe, nurturing environment where children can belong, grow, and envision a brighter future. Today, we serve nearly 150 K–12 students, the majority of whom are minorities from economically disadvantaged households. Through holistic programming, we see firsthand how academic success, social-emotional development, and a sense of purpose are deeply interconnected.

I joined the Board of The Gate School because I believe deeply in its mission to address those same interconnected needs. The founder understands that scholars thrive when their academic growth is supported by personalized learning, strong relationships, and innovative use of technology. This approach aligns closely with what I have seen transform lives through my work at YES.

As a resident of Northeast Davidson County and the mother of a child educated in Metro Nashville Public Schools, I am personally invested in expanding high-quality scholastic options for families in our district. I am confident The Gate School will be a valuable asset to our community—one that empowers students to hope, dream, and ultimately become leaders who break cycles of injustice.

It is an honor to support and serve The Gate School, and I am proud to contribute to its vision and success.

Respectfully submitted,

Viva Price
Executive Director
Youth Encouragement Services
viva@youthencouragement.org

NASHVILLE TEACHER RESIDENCY

To Whom It May Concern,

Nashville Teacher Residency is pleased to offer this letter of support for The Gate School and its charter application. We believe The Gate School represents a thoughtful and much-needed approach to public education. Its commitment to excellent teaching, shared instructional leadership, and teacher development aligns deeply with our mission and values.

For over a decade, Nashville Teacher Residency has prepared and supported teachers through a residency-based model rooted in rigorous coursework, consistent coaching cycles, structured practice, and targeted feedback. Our work centers on developing teachers who are well prepared, fully licensed, and well cared for. We also partner closely with schools to ensure teaching conditions support strong instruction, educator growth, and long-term retention.

Our conversations with The Gate School leadership make clear that this partnership is grounded in shared beliefs. Teachers are the primary drivers of student outcomes. Strong schools are built by investing in people. Retention improves when educators experience growth, voice, and support across every stage of their career.

The Gate School's teaching model is unique, compelling, and rare. The expectation that every instructional leader teaches students daily reflects deep respect for the craft of teaching and a culture of shared ownership. The school's commitment to competitive compensation, professional voice, and instructional excellence creates the conditions where strong teachers can succeed and remain in the profession.

Together, we aim to develop a first-of-its-kind partnership between a charter school and an educator preparation program. This partnership will focus on building and sustaining a strong teacher pipeline that serves The Gate School and can be scaled for future charter schools. Our shared goal is not simply to staff a school, but to design a model that supports new teachers, develops experienced educators, and offers a sustainable staffing approach for the broader field.

Through this partnership, Nashville Teacher Residency would support The Gate School by integrating resident teachers into a structured and mentored environment. Residents would receive consistent coaching, protected practice time, and feedback from experienced educators. This approach allows teachers to grow skills and confidence while students benefit from thoughtful instruction guided by exceptional educators.

At the center of this partnership is a shared commitment to strong student outcomes. Research and our own experience show that students learn best when instruction is consistent, rigorous, and delivered by supported teaching teams. By pairing high-quality preparation with strong school-based conditions, this partnership is designed to reduce teacher turnover, strengthen instructional coherence, and ensure students experience excellent teaching year after year. The Gate School's

focus on communication, discussion-based learning, and daily instructional leadership supports deeper student engagement, academic growth, and a positive school culture.

We are excited about the opportunity to co-design a staffing and development model that centers teaching quality, educator dignity, and student outcomes. We believe this partnership will strengthen The Gate School's ability to attract and retain excellent teachers while contributing valuable learning to the field.

Nashville Teacher Residency fully supports The Gate School's charter application and looks forward to partnering in this important work.
Sincerely,

Matt Cheek
Executive Director
Nashville Teacher Residency

NASHVILLE TEACHER RESIDENCY

January 22, 2026

To whom it may concern,

I write in strong support of The Gate School and its application for charter school approval in the state of Tennessee. I serve as a member of the Board of Directors, and I offer this letter based on my professional experience as an educator, school leader, and teacher development specialist. Additionally, I have firsthand familiarity with the instructional model The Gate School proposes to implement.

At the center of The Gate School's design is a clear and disciplined focus on instructional quality. The school's use of a teaching firm model reflects an understanding that strong schools are built through strong systems for developing, supporting, and retaining highly effective teachers. I have worked within and alongside similar models and have seen how shared instructional responsibility, authentic collaboration, and individualized coaching improve both teaching practice and student learning. This approach directly addresses one of the most persistent challenges in public education: ensuring consistency in quality of instruction across classrooms.

From a governance and operational standpoint, The Gate School founder, Burrus Cox, has demonstrated thoughtful planning around fiscal responsibility and public accountability. As a board member, I have observed leadership that is responsive to feedback, grounded in data, and serious about continuous improvement. The school's vision is ambitious yet very possible because it is paired with practical structures that support execution and long-term sustainability.

Tennessee's charter sector is strongest when approved schools combine innovation with proven instructional strategy and organizational readiness. The Gate School meets that standard. When approved, I am confident that it will operate as a responsible public charter school option that serves students with the care, rigor, and intentionally they deserve.

Thank you for your consideration.

Warmly,

Demetria R. Giles
Board Member, The Gate School
Director of Curriculum, Nashville Teacher Residency



To the MNPS Board of Education,

I am honored to write this letter of support on behalf of The Gate School and its co-founders, Burrus Cox and Jim Leckrone. As someone who has spent my entire life in public education, I look at the Gate School and think "of course, why doesn't everyone do that". Its common sense design elements make this school "little i" innovative and highly likely to succeed. At its core, The Gate School's premise is simple: design a school that puts teaching excellence at the center. The best part of The Gate School is that it is being led by two leaders who have proven their leadership in the classroom and in school leadership. Burrus Cox has been one of the most successful middle school math teachers in Nashville for the past seven years. At Republic, East End Prep, and Valor (all MNPS-approved charters), he has achieved outsized results for his students, often exceeding 50% better than the local average on state math exams. Jim Leckrone is one of the original charter founders in Nashville. East End Prep has continued to be one of the most consistent schools in Nashville, both operationally and academically. Jim is well known and respected throughout the Nashville education community for his collaboration and wisdom. Together, these two leaders will lead a great school. As the Executive Director of the Nashville Incubator, we are proud to walk beside them and provide the financial and social capital needed to successfully launch and operate a high-quality charter middle school in our community.

The Nashville Incubator was founded in 2021 with the goal of recruiting and supporting school leaders to launch innovative, high-quality schools that provide families with diverse public school options here in Nashville. In the first three years, under the leadership of Amy Huffman, the Nashville Incubator supported the opening of Aventura Community School, an MNPS district-approved charter, and Tennessee Nature Academy, a commission-approved school. We also supported the charter applications of Invictus Nashville Charter School, Encompass Community School, Nurses Middle College Nashville, The Rock Academy, and Jackson Museum School, all of which were approved by the Tennessee Charter Commission. Our selection process is rigorous, and inclusion in our program comes with significant financial backing and founding expertise.

In addition to providing funding to allow Burrus to be a full-time founder this year and supporting Jim's role next year, the Incubator has supported both leaders with multiple learning trips, professional coaching, and community development support, and is committed to continuing that support post-opening for the first two years of operation. Burrus and Jim have been working hand in hand with a truly talented program and academic designer, Brittany Monda, who has years of experience supporting founders in building excellent schools in Memphis, in addition to being a charter school founder and former head authorizer of Shelby County charters herself. Brittany is now on staff at the Nashville Incubator, leading our application design. Burrus and Jim also work closely with a tremendously talented instructional coach, Lisa Stone, who spent the last seven years running Valor Collegiate Academy's Principal Leadership Development Program, coaching school leaders across the country. Lisa is an exceptional coach who consistently moves the needle for our founders. Burrus and Jim meet weekly with both Brittany and Lisa. I have also worked closely alongside these leaders and bring more than 20 years of experience in public education as a teacher, coach, school leader, nonprofit founder, and executive director. I have been privileged to design and lead high-performing charter

schools and teams and have served as a reviewer for Tennessee Public Charter School Commission applications in previous years.

The Nashville Incubator is supported by the generous contributions and leadership of the Joe C. Davis Foundation, SCORE, City Fund, and the Bill and Crissy Haslam Foundation. These foundations are committed to high-quality, innovative schools in our city and state, and the Incubator is one of the primary strategies identified for launching these schools.

We know that one of the greatest challenges faced by founders is securing a strong incubation facility. To ensure that facilities are not a barrier to success, the Nashville Incubator provides targeted facilities support to our founders in several ways. First, we employ a full-time Director of Facilities to support founders in the selection, acquisition, and renovation of their incubation facilities. Shelby Goodfriend, our Director of Facilities, is the former Director of Charter Schools for the Tennessee Department of Education and has also served in various charter operations and leadership roles, in addition to having experience in construction and architecture. Second, we cover pre-construction costs associated with acquisition, architectural design, and construction management. Third, Nashville Incubator board members have generously committed to supporting schools upon approval and opening. One example is a grant opportunity of up to $250,000 from SCORE to support construction-related costs for incubation facilities. This grant can be used by The Gate School to cover expenses related to construction, down payments, or rent for a short-term incubation facility. We have also supported our founders in applying for CSP, State Facility, NSVF, and GSGF grants, with a high rate of success. Our board members are committed to ensuring that Incubator schools ultimately succeed, and each school we incubate has opportunities for additional grant funding upon approval and opening.

Finally, on a personal level, I want to share my confidence in Burrus and Jim. I have worked with many talented founders, but this team has been the hardest working and most open to feedback and continuous improvement that I have seen. They have tapped into a simple but powerful idea that resonates with every parent and educator they speak with: “Great schools are made by great teachers.” They have built a model focused on recruiting and retaining excellent teachers in front of students. They are humble, consistent, and exceptionally smart, and it has been a joy to walk beside them in this work. This school meets the state’s rubric in all sections but goes far beyond it. It is an innovative school with strong leadership, significant community support, solid financial backing, and a team of experts committed to helping it open and operate successfully. It will provide a middle school choice that families deeply desire. The Gate School will impact generations of Nashvillians and serve as a model for others across the country. Burrus Cox and Jim Leckrone are extraordinary leaders, and this school will fulfill our shared commitment as public educators in Tennessee to grow an informed and prepared citizenry. I am grateful to play a small role in seeing The Gate School flourish.

Sincerely,

Scott M. Campbell, Executive Director, The Nashville Incubator

Mike and Tina Hodges
Advance Financial 24/7
Chairman and CEO
tina.hodges@af247.com
November 21, 2025

To Whom It May Concern,

We are Tina and Mike Hodges, longtime business owners and philanthropists in the West Nashville area. For nearly 30 years, we have owned and operated businesses in the Bellevue area and have been proud to call Bellevue a beloved space in our lives. We are excited to support The Gate School and its mission in providing an excellent option for Bellevue families.

From providing high caliber teachers to an innovative model that focuses on the integration of research-based practice with purposeful communication development, we support The Gate School being an educational touchstone for this community. As we have 8 families employed whose children would be zoned for local Bellevue public schools within the coming years, we enthusiastically support this choice.

As native Nashvillians who care deeply about our communities continuing to grow and thrive, we are in strong support of The Gate School's approval and believe wholeheartedly in its innovative model of combining high quality teaching, emphasis on communication development, and its commitment to being a top selection for Bellevue families.

Sincerely,

Tina and Mike Hodges

Jennifer McInerney
Father Ryan High School PSN President and parent/St. Henry School parent
jennifermcinerney74@gmail.com

11/18/2025

To Whom It May Concern,

As a West Meade/Bellevue community member, I am proud to support *The Gate School,* a proposed middle school in our community. As a resident of this community, I believe that the addition of this school will contribute positively to the growth and well-being of local families. The Gate School's mission-centering on great teaching, meaningful relationships, and the pursuit of excellence-will provide tremendous value to families and students in our neighborhood and expand the choices available to parents to help ensure that all children have access to an environment where they can thrive.

The school's innovative staffing model and emphasis on collaboration set it apart as a place where both students and teachers can thrive. Our community is home to a diverse group of students with a wide range of needs, strengths, and aspirations.

In addition to enhancing academic opportunities, the opening of this school would strengthen our neighborhood by creating partnerships with families, local organizations, and community stakeholders. Middle school is a formative time in a young person's development, and students thrive when they are surrounded by educators who are both highly skilled and deeply invested in their success. The Gate School's intentional focus on great teaching demonstrates a commitment to academic rigor, engaging instruction, and high expectations for all learners.

I strongly support The Gate School's approval and believe its model will elevate both student outcomes and the teaching profession in Nashville.

Sincerely,

Jennifer McInerney

Russell H. Keller Ed.D
513 W. Hillwood Dr.
Nashville, TN. 37205
Russk@wcs.edu
11.29.25

To Whom It May Concern:

I am writing to offer my full and enthusiastic support for the establishment of **The Gate School**, new charter school proposed for the Bellevue, Tennessee community. As someone who has taught middle school aged students in the Nashville area for the better part of three decades, I have seen firsthand how urgently we need innovative approaches to public education, particula at the middle school level. Today's students face challenges that require fresh thinking, collaborative environments, and student-centered philosophies, all of which The Gate School is committed to providing.

The Gate School's *"students-first"* mission, its emphasis on collaboration and excellence, and i unwavering belief that *every student can succeed* reflect exactly the kind of educational directio our public schools need right now. These values are not just admirable; they are essential. Schools that prioritize the whole child, academically, socially, and emotionally, are the ones tha make the most meaningful impact, and The Gate School is clearly designed with this holistic approach at its core.

As someone who attended middle and high school in the Bellevue area, I know this community well. Bellevue is a place that embraces growth, values strong public institutions, and consistent supports opportunities that enrich the lives of young people. It is precisely the kind of communit that will rally behind a mission-driven school like The Gate School. I truly believe Bellevue is the perfect home for this innovative educational model.

For all of these reasons, I wholeheartedly support The Gate School and the tremendous potentia represents for students and families in Bellevue and the greater Nashville area. I urge you to give this proposal the strongest possible consideration.

Sincerely,

Russell H. Keller

Russell H. Keller Ed.D

November 21, 2025

Mr. John N. Carney
Executive Director, Private Family Foundation
7100 River Park Court
Nashville, TN 37221

To Whom It May Concern,

The vision and mission of *The Gate School*, which place the highest priority on exceptional teaching and excellent learning outcomes for students, is an exciting and unique approach to public education that our city deserves. As a native Nashvillian and parent to two children who completed secondary education in Nashville-area schools, I strongly support the establishment of this new public charter middle school.

It was only under the tutelage of outstanding, highly invested teachers that my own kids thrived in the classroom. Those teachers were not only gifted at instructional delivery, but also at engaging and motivating students to "lean in" to learning opportunities and be confident in their own ideas and points-of-view. Unfortunately, however, I recognize that most schools are just not able to equip and enable teachers to do their best work. That is why the "Teaching First" philosophy of *The Gate School* resonates with me and my family.

Sadly, our education system continues to struggle to gain ground in student performance. We desperately need new models and approaches to offer families a chance at better outcomes. I believe the innovative model proposed by *The Gate School* can do just that.

Thank You for Your Consideration,

John N. Carney

John N. Carney | 7100 River Park Court | Nashville, TN 37221 | johnnelsoncarney@gmail.com

Harlan Holmes

Old National Bank

Mortgage Broker VP

Haraln.holmes@oldnational.com

11-20-2025

To whom it may concern:

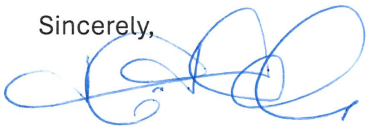
As a member of the Bellevue community for the last 32 years, I give my whole hearted support for The Gate School and its mission to create a middle school that centers on great teaching, meaningful relationships, and the pursuit of excellence. The school's innovative staffing model and emphasis on collaboration set it apart as a place where both students and teachers can thrive.

My closest friends are educators and I have seen firsthand how powerful it is when teachers are empowered to lead and innovate. I believe The Gate School's structure honors that truth and puts students learning first.

I think Bellevue needs more great schools for parents to choose from that don't require big tuitions.

I strongly support The Gate School's approval and believe its model will elevate both student outcomes and the teaching profession in Nashville.

Sincerely,



Harlan Holmes

Brooke Allen
Diverse Learners Cooperative
April 21, 2026

To Whom It May Concern,

I am Brooke Allen, Executive Director of Diverse Learners Cooperative, writing in enthusiastic support of The Gate School. Through our work empowering educators and creating inclusive environments across Nashville, I've seen firsthand the critical need for innovative educational approaches that serve every learner. After a thorough review of The Gate School's application, it is clear that this school is well positioned to serve Nashville's diverse learners with the rigor and care they deserve.

The Gate School has been designed with diverse learners in mind, including a full continuum of services, manageable special education caseload sizes, ESL-credentialed staff, and a Head of Student Supports at the leadership level. The school's grounding in Universal Design for Learning ensures that instruction is accessible for all students. The Harkness method, when implemented with proper scaffolding such as vocabulary previews, sentence stems, multiple means of expression, and structured discussion roles, will be a meaningful tool for building comprehension, language development, and critical thinking in diverse learners.

In our work across Tennessee schools, the most successful schools are always the ones that intentionally design systems to retain and support educators. The Gate School's commitment to developing its educators is notable. Through meaningful professional development and weekly coaching cycles, teachers will have ongoing opportunities to grow. Teacher retention is central to the DLC's work, and The Gate School's approach is aligned with research on what keeps strong educators in the classroom and growing in their practice. This investment in adults will help all teachers better support diverse learners.

The Gate School's mission, focused on student independence, academic excellence, effective communication, and responsible use of technology, resonates with our shared belief that diverse learners deserve to be prepared for life beyond the classroom. We are proud to partner with this founding team.

Sincerely,

Brooke N. Allen

Brooke Allen
Executive Director
Diverse Learners Cooperative
brooke@diverselearnerscoop.com

ELMINGTON

May 14, 2026

Re: Letter of Support — The Gate School Charter Application

To whom it may concern,

My name is LC Wallace, and I serve as Director of Development at Elmington, a development & property management organization with communities across the Country yet headquartered here in Nashville, TN. I am writing to offer my wholehearted support for the meaningful charter school application submitted by Burrus Cox for The Gate School.

I've had the privilege of facilitating connections between The Gate School and Elmington, specifically the families living in two of our apartment communities in Bellevue, Tennessee — 8200 McCrory and McCrory Flats. These conversations were impactful. Families expressed a genuine hunger for quality educational options in their neighborhood, and Burrus demonstrated a thoughtful, compassionate, and community-centered approach in every interaction. It is clear to me that the vision behind The Gate School is rooted in a deep commitment to serving children and families who deserve access to exceptional education close to home.

Nashville is home to a growing and diverse population of families who are actively seeking strong educational pathways for their children. So many families desire to see their children continue to grow and thrive academically and personally, and a charter school like The Gate School — positioned to offer a rigorous, nurturing, and accessible educational environment — would be a tremendous blessing to these families and to the wider Nashville community.

I am confident that Burrus' impressive education experience thus far, his genuine engagement and care for our residents, and passionate calling for The Gate School will equip this new charter school to be a place where students are known, valued, and equipped to reach their full potential. Nashville has always been a city that invests in its people, and approving The Gate School's charter would be a powerful statement that every child in this city — regardless of zip code or circumstance — deserves an outstanding education.

I respectfully and enthusiastically support The Gate School, and desire for others to do the same. Please do not hesitate to reach out to me should you have any questions or wish to discuss my support further.

Sincerely,

LC Wallace, Director of Development

1030 16th Avenue South, Suite 500 | Nashville, TN 37212-2358 | O: 615.490.6700

To Whom It May Concern,

I am writing to offer my strong support for The Gate School and its continued work serving students and families in our community.

As a leader of Nashville PROPEL, I work closely with families across Metro Nashville who are not just seeking access to schools, but access to quality, schools where students are truly learning, growing, and being prepared for long term success. There is a clear and urgent need for more high quality middle school options in Nashville, and families are actively searching for schools that deliver strong academic outcomes and real opportunity for their children.

The Gate School stands out as a school that is deeply committed to student outcomes and intentional about creating an environment where children can thrive academically and personally.

This leader has an outstanding record of increasing academic outcomes for students, demonstrating a clear commitment to both excellence and accountability.

Families consistently express the need for schools that are focused on strong literacy foundations, high expectations, and a culture that believes in every child's ability to succeed. The Gate School reflects these priorities through its commitment to academic excellence, student support, and continuous improvement.

Just as important, we know that better school options are shaped by informed and empowered families. Parent voice matters. When families have access to clear information and high quality choices, they demand better and help drive stronger outcomes across the system. Schools like The Gate School respond to that call by providing a meaningful option grounded in quality and accountability.

What makes The Gate School particularly important is the role it plays in expanding access to high quality options for families. In a system where outcomes can vary widely, it is critical that we support schools that are demonstrating a commitment to doing what works and doing it well.

I am proud to support The Gate School and encourage continued investment in its work and impact.

Sincerely,

Sonya Thomas
Executive Director
Nashville PROPEL Parent Institute

DeeAnn Hodge
Founder and Executive Director of Wonderfully Made Ministries
05/07/2026

To Whom It May Concern,

My name is DeeAnn Hodge, and I am the Executive Director and Founder of Wonderfully Made Ministry, where we work closely with children and families in the Haynes Garden affordable housing apartment community in downtown Nashville through our after-school enrichment program and summer camps. I also have a background in social work and have spent over 30 years working with children and families from a wide variety of economic and social backgrounds. Over the years, I have had the privilege of walking alongside many children who are incredibly bright, capable, creative, and full of potential, yet often face significant academic, emotional, and environmental challenges.

Through our ministry, I have seen firsthand that many of these children are not lacking ability, they are lacking opportunity, consistency, encouragement, and educational environments that truly see and develop their strengths. Many struggle academically, not because they are incapable of learning, but because traditional systems are often not designed to meet their unique needs or circumstances. Some have experienced instability, trauma, lack of support at home, or simply years of discouragement that have caused them to disengage from school altogether. Yet when they are given structure, meaningful relationships, accountability, and people who genuinely believe in them, I have watched them grow in remarkable ways.

One of the greatest gaps I see within the current system is the inability to consistently provide individualized support, mentorship, and environments where students feel both challenged and valued. Too many children fall through the cracks academically and developmentally because the system often focuses more on behavior management or test performance than cultivating confidence, character, leadership, and a love for learning.

It has been a tremendous blessing to observe Burrus working with the boys in our program. What stands out most is his genuine care for them as individuals and his belief in what they are capable of becoming. He brings patience, consistency, encouragement, and high expectations in a way that earns both trust and respect. The boys respond to him because they know he sees them, values them, and believes in their potential.

One moment that especially stands out to me involved one of our 9-year-old boys who still cannot read. He is very well-behaved and often tries to stay unnoticed because he does not

want the other boys to realize he is struggling academically. Burrus interacted with him with such kindness, dignity, and encouragement, never making him feel embarrassed or inadequate. Instead, he spoke confidence into him, engaged him patiently, and helped create an environment where he felt safe and valued. It was clear that Burrus saw beyond the child's current struggles and recognized the potential within him. I have personally witnessed the positive impact Burrus has had through his interactions with the boys in our program.

I believe The Gate School has the potential to provide something deeply meaningful and needed for students like the children we serve. A school intentionally built around strong teaching, structure, relationship, accountability, and opportunity could truly help students thrive academically, emotionally, and personally. I believe many children simply need the right environment and people who are willing to invest in them consistently in order to succeed.

I wholeheartedly support Burrus and his vision for The Gate School and believe his heart for students, combined with his educational experience and commitment to excellence, will make a lasting impact on the lives of many young people and families.

Sincerely,

DeeAnn Hodge

Attachments 1.8 B

Schools and Universities

Letters of Support

Evidence of Community Engagement

ENSWORTH
In Search of Truth

To Whom It May Concern,

In my 25-plus years of teaching, I cannot think of an event that means more to me, or one that makes me more proud, than writing this letter of recommendation for Burrus Cox. Of the hundreds of letters I have written and the dozens of recommendations I have provided, this one holds the greatest personal and professional significance.

Burrus is a former student of mine, and I had the privilege of teaching him in multiple classes during his time at Ensworth. He remains one of the single most unforgettably wonderful students I have ever taught. Over the years, I have stayed in touch with him and have been consistently impressed by his unwavering dedication to one purpose: improving the lives of young people by providing them with the very best education possible.

At Ensworth, we strive to build student knowledge, confidence, agency, and community in many ways, but our humanities classrooms do this most powerfully through our version of the Harkness method. In our classrooms, students and a teacher gather around an oval table, where every student assumes equal responsibility for contributing, questioning, and shaping the discussion. This dynamic setting shifts learning from passive absorption to active exploration—students test ideas, engage respectfully with differing perspectives, and practice open-ended, face-to-face dialogue. The teacher, in turn, guides and supports the process, establishing guardrails and modeling how to think deeply and critically, rather than dictating what to think.

Burrus embraced this approach wholeheartedly as a student. When we've reconnected over the years, he often credited his Harkness experience at Ensworth as foundational to his success at Vanderbilt—socially, intellectually, and personally. It feels both fitting and deeply inspiring that he now seeks to build his own school around these same principles. His vision for Gate Academy—a student-centered institution grounded in discussion, belonging, and intellectual curiosity—is not only ambitious but also research-driven and powerfully relevant to students' current needs.

Educational research consistently affirms what Burrus intuitively understands: one of the most reliable predictors of student success, especially in middle school, is a strong sense of belonging. Harkness discussions are a proven vehicle for this. They cultivate inclusivity, empathy, and confidence—creating classrooms where students feel seen, valued, and intellectually alive. Burrus knows that this structure does more than encourage collaboration; it builds community. The physical act of facing one another reinforces respect, accountability, and support—qualities too often missing in traditional learning environments.

Equally meaningful is the way Harkness nurtures the habits of civil discourse. Students learn to question with integrity, listen with empathy, and discover common ground across difference. These are not only

ENSWORTH 7401 Highway 100 Nashville, TN 37221 P: 615.301.5400 F: 615.301.5401

ENSWORTH
In Search of Truth

academic skills but societal ones—skills our world urgently needs. Burrus has long modeled this mindset, and I have no doubt he will ensure that the students at Gate Academy will do the same.

Burrus has not approached this endeavor lightly. He has done the hard work. He has visited Ensworth repeatedly, observed classes across disciplines, reviewed research, debriefed with teachers, and sought feedback with humility and purpose. His questions are thoughtful, his reflections insightful, and his persistence remarkable. In nearly two decades at Ensworth, I cannot think of a former student who is more dedicated, determined, and prepared to lead a school committed to discussion-based instruction and human-centered learning.

It is with tremendous pride and absolute confidence that I recommend Burrus Cox to you. His vision is grounded in proven pedagogy, shaped by years of reflection, and fueled by an uncommon moral commitment to students. Supporting him is, without question, an investment in the next generation of transformative education.

Sincerely,
Jeanne Hubert
Dean of Faculty
Ensworth School - Frist Campus

ENSWORTH 7401 Highway 100 Nashville, TN 37221 P: 615.301.5400 F: 615.301.5401

EMBER
CHARTER SCHOOLS

Main Office:
616 Quincy Street, 3rd Floor
Brooklyn, NY 11221
718-285-3787
www.embercs.org

Mission
We endeavor to ignite, empower, and transform young people of great promise traditionally labeled "at-risk" and who have access to the least economic resources, into social entrepreneurs, engineers, and global leaders through our innovative, holistic, and progressive human development school model.

Vision
Our vision is to use our Teaching Firm, a unique teacher-led organizational model, to be a fun, holistic, 'college-successful', career-ready, community-centered, culturally rich and relevant incubator of exceptional human potential where we spark, nurture and unleash mindful people empowered to affect positive change in the communities we serve.

January 22, 2026

To Whom It May Concern,

I am writing to offer my strongest and most enthusiastic support for the charter application submitted by Burrus Cox to establish The Gate School in Nashville. I do so not only as an educator and school founder, but as someone who has spent the past fifteen years building, refining, and living inside the very organizational model that sits at the heart of the Gate School proposal: the Teaching Firm, a model for teacher led schools that I designed and currently operates as our organizational structure here at Ember.

I first met Burrus when he visited Brooklyn to see the Teaching Firm in action here at our schools. During that visit, he observed classrooms, leadership structures, and daily operating routines, and we spent time discussing not only the strengths of the model, but also the discipline and clarity required to implement it well. What stood out immediately was Burrus's seriousness about understanding the model at a structural level, not just as an idea, but as a set of operational commitments that must hold up under real conditions.

At the core, Burrus is not simply proposing a new school in The Gate School—he is proposing a fundamentally different way of organizing the adult work of teaching. That distinction matters. In a moment when the nation is grappling with historic teacher shortages, high rates of burnout, and declining trust in the profession, the most urgent question we face is not whether we can recruit teachers, but whether we can build schools worthy of retaining great ones.

The Teaching Firm model does exactly that.

At Ember, we intentionally rejected the traditional "one teacher, one classroom, one door closed" paradigm. Instead, we designed schools that function more like professional service organizations—where educators work in teams, develop through apprenticeship, grow through clearly defined roles, and share responsibility for outcomes. Over fifteen years, this approach has allowed us to attract and retain exceptional educators, all of whom have chosen to remain in classrooms while taking on real leadership and management, rather than being forced out of the classroom to advance their careers. The results—both for students and adults—have been profound.

What excites me most about The Gate School is not that it borrows from this model, but that it applies it thoughtfully to a new context with clarity, discipline, and ambition. The Gate School's partner-based leadership structure—anchored by an Executive Partner, Culture Partner, and Operations Partner—ensures that instruction, student experience, and operational excellence are aligned from day one. This is a rare and powerful design choice, and one that dramatically increases a school's likelihood of success during its most fragile early years.

Equally important is the school's layered instructional staffing model. By organizing educators into differentiated roles—Partners, Senior, Mid, and Junior Associates, Co-Teaching Apprentices, and paraprofessionals—The Gate School creates a built-in talent pipeline that supports novice teachers rather than overwhelming them, while honoring and retaining expert practitioners. Teaching becomes a profession with a future, not a test of endurance. This structure is not theoretical; it is precisely how Ember has sustained instructional quality while serving students with significant needs and complexity.

I want to be especially clear on this point: the Teaching Firm is not an abstract governance idea. It is an operationally rigorous, research-aligned, and field-tested model that produces stronger adult culture, deeper collaboration, and better outcomes for young people. It aligns

Ember does not discriminate against any student, employee or other person on the basis of race, ethnicity, national origin, gender, disability or any other unlawful ground.

EMBER
CHARTER SCHOOLS

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616 Quincy Street, 3rd Floor
Brooklyn, NY 11221
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www.embercs.org

Mission
We endeavor to ignite, empower, and transform young people of great promise traditionally labeled "at-risk" and who have access to the least economic resources, into social entrepreneurs, engineers, and global leaders through our innovative, holistic, and progressive human development school model.

Vision
Our vision is to use our Teaching Firm, a unique teacher-led organizational model, to be a fun, holistic, 'college-successful', career-ready, community-centered, culturally rich and relevant incubator of exceptional human potential where we spark, nurture and unleash mindful people empowered to affect positive change in the communities we serve.

incentives around growth, accountability, and shared purpose, while restoring dignity and agency to the work of teaching.

Burrus Cox understands this deeply. He is not pursuing innovation for its own sake, but because he recognizes that student success is inseparable from adult conditions. The Gate School's design reflects a leader who respects teachers as professionals, believes in developing talent from within, and understands that sustainable excellence is built—not mandated.

Since his visit to Ember, I have partnered with Burrus as he has designed The Gate School's version of the Teaching Firm. Our work together has included conversations around role clarity, decision-making authority, compensation structures, and how to maintain instructional coherence while distributing leadership. Burrus has consistently demonstrated intellectual humility, a willingness to pressure-test assumptions, and a strong focus on sustainability rather than novelty.

For Nashville, The Gate School represents more than an additional high-quality option. It represents a chance to model what the future of public education can look like when we organize schools around people, purpose, and possibility.

I offer my full support for this application and my confidence that The Gate School will serve students, families, and educators with distinction from its very first day.

Sincerely,

Rafiq R. Kalam Id-Din II, Esq.
Founder & Managing Partner

"Learn to defeat racism, nurture prosperity, change the world ..."
Inspiring the next generation, one mind at a time

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VALOR COLLEGIATE
Academies

To Whom it May Concern -

I am writing a letter of support for Burrus Cox and the Gate School. I have known Burrus for multiple years and can attest that he is an exceptional educator who has an exciting vision for a new school model that will greatly benefit and push the thinking of educators and families in Nashville and beyond. As a long-time school designer and leader in the charter school space, I am a fierce believer that a) we need to support the creation of great schools for all students until every child is attending a high performing school, and b) we need to hold a high bar for all of our schools.

I believe the Gate School, and most importantly Burrus leading the Gate School, has the potential to meet the criteria of a high performing school that will benefit families in Nashville. The central design concept is simple but powerful - what if we kept our best teachers and leaders connected to the classroom? This question has been asked many times but there are few examples of it being answered well. The Gate School has the potential to give a strong answer to that question, and the impact that could have on the families and teachers who are part of the Gate School community is significant. I also believe that the impact it could have on other schools and families could be significant. Burrus has already pushed my own thinking on how to optimize school design around teachers, and I believe the Gate School will continue to do that for me and many other education leaders in Nashville.

I am excited to support the Gate School in the coming years.

Sincerely,

Todd Dickson
Founder and CEO
Valor Collegiate Academies



January 23, 2026

To Whom It May Concern:

I am pleased to write in support of Burrus Cox's application to establish The Gate School in Nashville. As Chief Culture Officer at Valor Collegiate Academies, I have been responsible for designing and stewarding the comprehensive culture systems our network uses to create safe, productive, and affirming learning environments. I have known and worked with Burrus for several years and can speak directly to both his character and his deep understanding of the principles that underpin effective school culture.

Burrus understands what many educators miss: that school culture is not a set of rules to enforce, but a living ecology that adults must embody first. During his time at Valor, he demonstrated a rare capacity to engage with our culture systems not as scripts to follow, but as frameworks to inhabit - learning their underlying logic, their relational architecture, and most importantly, the values that animate them. This distinction matters enormously. It is the difference between replicating surface structures and understanding the metabolic work those structures support.

The culture model Burrus has designed for The Gate School reflects this depth of understanding. His adaptation of Valor's Commitment-Based Culture, Compass Points (reimagined as Path Points), On-Path Support Cycle, Faculty Circles, and restorative discipline practices demonstrates both fidelity to core principles and thoughtful customization for his specific community and context. He is not attempting to transplant Valor wholesale into a new setting. He is doing the harder, more generative work: translating the why behind our systems into structures that can hold the particular students, families, and adults The Gate School will serve.

I want to be explicit: Burrus has our full permission and blessing to adapt elements of Valor's culture systems for use at The Gate School. More than that, he has my confidence that he will steward them with integrity, making them his own while honoring the relational commitments at their heart.

What gives me this confidence is not just Burrus's understanding of our frameworks, but his embodiment of the values that make them work. He knows that culture systems succeed only when adults demonstrate psychological safety, practice restorative accountability with one another, and remain committed to keeping students connected to learning rather than removing them when things get hard. He knows that the point is not compliance, but belonging - and that belonging requires adults willing to show up with both clarity and compassion.

Nashville needs more schools led by people who understand this. Burrus Cox is one of those people. I recommend him without reservation and look forward to seeing what he and his team will build.

Please do not hesitate to contact me if I can provide any additional perspective.
Sincerely,

Daren Dickson
Executive Director of Innovation & Chief Culture Officer
Valor Collegiate Academies
415-760-0072
ddickson@valorcollegiate.org

Mona Ivey-Soto PhD, MSW, MSEd
Belmont University
Associate Professor
College of Education & Global Honors
1900 Belmont Blvd
Nashville, TN 37212

December 3rd, 2025

Greetings,

It is my distinct pleasure to send this letter of support for The Gate School and the leadership of Mr. Burrus Cox. I had the honor of meeting with Mr. Burrus Cox a few months ago and after hearing more about the vision and mission of The Gate School I was immediately drawn into its rigor, relevance and dedication to excellence for ALL students. In a time and context where there are many entities attempting to educate students in urban areas, The Gate School is anchored in highly effective pedagogy during the critical formative years of 6-8th grades. As a school leader Mr. Cox is not only knowledgeable but also teachable. He aims to learn with and from the community and this is something that I don't often see in school leaders. As a servant leader, he has the heart of an educator with the dimensions of effective leader which provide a necessary combination.

I am excited for the future of this innovative and unique school poised to make a profound impact on the Nashville educational landscape. I look forward to continuing involvement in The Gate School.

Sincere regards,
Mona Ivey-Soto PhD
Dr. Mona Ivey-Soto

To Whom It May Concern,

My name is Anne Grace Simmons, and I have had the privilege of teaching Exceptional Education at Harpeth Valley Elementary School for the past several years. In addition to teaching, I have also coached the 4th and 5th grade soccer team. Through both roles, I have had the opportunity to build strong relationships with students and families and to watch the Bellevue community grow and evolve in meaningful ways.

During my time at Harpeth Valley, I have seen a noticeable shift in the population our school serves. As Bellevue has grown in population and in diversity, Harpeth Valley has reflected those changes. The addition of the McCrory Lane apartments and the growing number of families moving into the area specifically to access Harpeth Valley have both contributed to the boom in Harpeth Valley attendance. Enrollment has increased substantially, not only because of new housing developments, but because parents recognize Harpeth Valley as a thriving elementary school and are intentionally seeking it out for their children.

I have also seen a shift in what families want for their children after elementary school. While many Harpeth Valley students traditionally left for private school, more and more families have a desire for their children to attend a public middle school in their community. At the same time, I have had countless conversations with parents of 4th and 5th graders who feel worried, discouraged, and frustrated by the middle school options currently available to them. These are families who genuinely want to stay rooted in Bellevue, but who also want a rigorous, supportive, and inspiring educational environment for their children.

Because of this, I have loved being able to tell parents and coworkers about the Gate School. The Gate School will be a school that values outstanding teaching, leadership that remains connected to the classroom, purposeful use of technology, and an environment that will both challenge and support students in their education. Every single conversation I have had about the possibility of the Gate School opening in Bellevue has been met with excitement and hope. Parents light up at the idea that their children could have access to a strong middle school education while remaining in the community they care so deeply about.

Bellevue is a close-knit, supportive, diverse, and growing community. Our students are capable, hardworking, and full of potential, and our families are deeply invested in their success. They deserve a middle school where students can truly thrive academically, socially, and emotionally. I believe the Gate School has the potential to be that place, and I would be proud to support its presence in Bellevue.

Sincerely,

Anne Grace Simmons

April 15, 2026

To Whom It May Concern:

I am writing to offer my strongest and most enthusiastic support for the charter application submitted by Burrus Cox to establish The Gate School in Nashville, Tennessee. I have been a school administrator and teacher for the past 45 years and have worked at 5 different schools during that time – private, public, and public charter. For the past 18 years, I have held administrative and teaching positions at Washington Latin Public Charter School, the only classical public school in Washington, DC. I was the principal of our first campus for 13 years and am now the Chief of Classical Education. Washington Latin has been rated as Tier 1 (the highest ranking for a DC charter school) since its inception and continues to be a model of public education for the children of the District. We currently have over 3500 students on our waitlist. I include these statistics as Washington Latin and the Gate School share a number of features and I am confident that at its 20-year mark, the Gate School could achieve the kind of success we have enjoyed at Washington Latin. Both of our schools represent the fulfillment of the inspiring promise of charter schools: a testing ground for innovative, successful models of public education.

After meeting Burrus and giving him a detailed look under the hood of our school, I quickly realized that Burrus was a kindred spirit with those of us who designed and now shepherd Washington Latin. We share three bedrock beliefs, each of which drives a culture of success for young people and for those adults who work in the environment. First, Burrus Cox believes that schools are serious intellectual places. Students are in school to learn, to think, to discuss ideas. While a school may serve as a student's second home and fulfill an emotional need, a school must first and foremost be a place of learning. This does not mean that there is no laughter or joy. Quite the contrary! True joy comes when students are engaged purposefully. I believe that Burrus will lead his school to be a place "where students pursue what is challenging, meaningful, and worthwhile."

Second, Washington Latin and the Gate School are two of a handful of schools who ask all administrators to remain in the classroom in some capacity. This feature of the Gate School application may seem like a nice frill, but in fact it is a major statement of intent. This is the single most important feature of Washington Latin. By requiring student-facing time of all administrators, Burrus will accomplish the following:

- Establish a culture in which everyone is teaching and learning
- Flatten the power structure and bridge the usual difficult divide between administrators and teachers
- Allow administrators who love to teach an opportunity to lead without stopping what they love to do.
- Give the students a model of adult learners
- Build an adult culture of respect and trust, given that the administrators are "walking the walk."

Third, the Gate School, like Washington Latin, is committed to a pedagogy of discussion and Socratic inquiry. So many schools say that they are interested in this interactive kind of pedagogy and then they fall back into the standard pattern of teaching as monologue. Given Burrus' comments as he observed several classes at Washington Latin, I am confident that he is an astute instructional leader and that he will push his faculty to engage the students in dialogue. Washington Latin has pledged to work with the Gate School on seminar training and to help them foster the kind of disciplined, flexible thinking at the heart of all great education.

When people ask me why Washington Latin has been so successful, I often just summon the quality of the students. This is not the usual "we have great kids" sentiment. A challenging curriculum and a warm environment will entice a city's best students, no matter their background or socioeconomic status. This is the key to our school and will be to the Gate School. A very challenging, ordered, decent public charter school will be the wish of all parents. The Gate School, like Washington Latin, will attract students who otherwise would go to private school, as well as the students who are furthest from opportunity. This is the promise of the Gate School and the real contribution to Nashville. An integrated community with a noble purpose.

We at Washington Latin are ready to help Burrus Cox on his quest to create a school where people, words, and ideas matter. We know he can do it.

Sincerely yours,



Diana E. Smith
Chief of Classical Education
Washington Latin Public Charter Schools

Attachments 1.8 C

Students

Letters of Support

Evidence of Community Engagement

Caia Sims
9/28/2026
Class of 2029

The opening of Mr. Burrus' new school, The Gate School, would be perfect because it will reflect his everyday behavior as a teacher and a leader. I was in Mr Burrus' 8th grade math class, and I never felt like a burden and my questions always got answered. I've always struggled a bit in math, which is funny because I love math. Although, once I got in his class, it's like everything clicked for me! He made teaching fun and catered to everyone's learning styles. He also juggled basically a high school class for a full class of students and many other students in 8th grade math! He always had a smile on his face and really helped me prepare for high school classes. Therefore, I am really thankful for Mr. Burrus' and he should be able to share his intelligence through The Gate School!

-Caia Sims

Emily Sandoval
Class of 2029

Hello, my name is Emily Sandoval and here is why Mr Burrus is the best. When I walked into 8th grade math on the first day of school, I wasn't expecting much since the year before we had a rough start to math class. However, Mr. Burrus was different and he proved himself that very same day. Mr Burrus knew exactly how to grab our attention and help us focus with his intentional speeches about the narrow gate. Ever since Mr. Burrus introduced the narrow gate to me, it's changed the way I've seen work during school and it has motivated me to work hard even when I didn't feel like it. Not only did Mr Burrus help me with school work, but he's been there for me whenever I needed someone to talk to. Mr Burrus knows how to work with students no matter what level they are at. He meets them with grace and kindness and shapes students into their best selves. He sees the best in students and encourages them, making them feel safe. Mr Burrus knows how to build a community that allows students to express themselves and grow in their unique ways. To this day I think about how much of an impact he has had on my life and I'm forever grateful that he was my 8th grade math teacher!!

-Emily Sandoval

Journee Brown
Class of 2027
12/1/2026

My name is Journee Brown, and I had the pleasure of being one of Mr.Burrus's students in 8th grade at East End Prep. I can admit that I was never a fan of math, but after having Mr.Burrus as a teacher , I started to like it a bit more. My time in Mr.Burrus class was usually filled with laughter and participation. I was one of his students who didn't raise my hand because I often didn't understand what was being taught. Once Mr.Burrus noticed that I was struggling—based on my quiz and test results— he took the time to explain each step of how to solve a problem. He even used more hands-on methods to help me understand better. I truly appreciate the effort Mr.Burrus put into helping me . He didn't just explain things; he actually taught me how to improve. Because of his dedication and determination that he saw in me, my grades improved tremendously. As a result, I aced my TCAP test— and it was all because Mr.Burrus never gave up on me and believed in my capabilities as a student. We still keep in contact today. He continues to check in and encourage me, and even has supported me by showing up to one of my races . And for that reason, I know Mr.Burrus would be an excellent fit to start his own school. He has the patience, passion , and vision to create an environment where students feels supported, challenged , and seen . His determination for his students both in and out of the classroom shows the leadership needed to have a school where students are put first .

Journee Brown

Leiah Holland
Class of 2024
12/10/2025

To whom it may concern,

Mr.Burrus was an amazing teacher. He helped me better understand anything that was complicated. He was very patient with me and made sure I was trying my best never giving up. Mr.Burrus taught me to have patience with my teachers and that not every lesson is to target me or go against me but to help me grow and he only wanted better for me. I think he would be a great teacher here at The Gate and he will change the thinking process of students and help them in many ways. He's very funny. I had so many laughs learning with him I could ask to talk to him about anything he was very understanding and he gave the best advice. I hope he also shares these amazing experiences and these amazing learning techniques with the students.

Leiah Holand

Letter of Support
Makyah Cox

Hi, my name is Makyah Cox, and I've had the honor of being one of Mr. Burrus's students at East End Preparatory. Five years ago, everything began to change for me after my very first math class with Mr. Burrus. The way he taught—his patience and buzzing energy—made my eighth-grade year feel like the moment I finally began to understand my own potential. There was never a dull moment in the UTC classroom, yet that was the place where I, and so many others, felt the most comfortable. It was the class we learned the most in because Mr. Burrus was so special as our teacher and mentor. Now, as a high school senior preparing to graduate in May, I could not be more thankful for the support Mr. Burrus has shown me—not just as a student, but as a person and a young friend.

Ultimately, Mr. Burrus is the person who *most* deserves to open The Gate School. His dedication and energy for students makes him exceptional for this role. I can honestly think of no one else more deserving for this. Mr. Burrus will successfully lead, guide, and create a space where students will grow and feel supported the same way I did years ago.

Thank you.

Shinyan Ahmed
Former Student of Mr. Burrus
11/17/25

To Whom It May Concern,

Mr Burrus has genuinely not been just an amazing teacher also just such a sweet person to talk to. I've never done so well in a class in my life and haven't felt so comfortable with a teacher before. He didn't only grow me as a student but as a person and helped me through so much. I don't think any teacher can ever match the type of teacher AND person he was. One of the most respected teachers and I know if he built a school it would actually be a nice school and have a sense of place for students instead of just feeling like jail. If there was room for my grade I would've been the first to sign up.

-Shinyan Ahmed

Vernon Holland

Class of 2026

11/18/25

To whom it may concern,

Having Mr. Burrus as a teacher has truly been a blessing to my school career. Burrus created an environment where students felt safe to speak up, take risks, and grow both academically and personally. He didn't just teach lessons, he took the time to understand and support us individually. Burrus always pushed us students to think deeper and aim higher, but in a way that made us feel capable instead of overwhelmed. I truly believe Burrus has the vision, care, and work ethic needed to build a strong school community where students feel motivated, respected, and supported!

Love and peace,

Vernon Holland

Attachments 1.8 D

Families

Letters of Support

Evidence of Community Engagement

April Welch

12/2/2026

To whom it may concern,

I am writing to express my strong support for The Gate School and for Burrus Cox's leadership in this initiative. During the time he taught my son, I witnessed firsthand his ability to connect with students, meet them where they were, and inspire them to go beyond what they thought possible, especially in math. He created an environment where learning was engaging and challenging, and he consistently demonstrated care for students both inside and outside the classroom.

What I saw in his classroom was remarkable: he worked the entire room with energy, helped all students, and was constantly moving. I never saw him sitting. Students were regularly asking and answering questions, fully engaged in the learning.

His involvement in extracurricular activities showed his commitment to building trust and meaningful relationships, which opened doors for students to grow academically and personally. As I stated earlier, Nashville would benefit from additional options for families to find the best fit for their students. I believe Burrus will be a strong leader and the right person for the job.

Please know he has my full support as he moves forward with this important work.

April Welch

Chantal Stewart

Parent

11/29/2025

To Whom It May Concern,

I am writing to share my full support for The Gate School and for its founder, Mr. Burrus. As a parent who has witnessed firsthand the impact Mr. Burrus had on my daughter, I can say without hesitation that he is exactly the type of leader Nashville families need.

Math has always been my daughter's favorite subject, but before she had Mr. Burrus, she went through a tough year with teaching styles that didn't fit her needs. Her confidence dropped, and the joy she once had for math started fading. When Mr. Burrus stepped into her life, everything changed. He brought back her love for the subject by being personable, patient, and teaching in a way that made everything finally click. She gained a complete understanding—and even more importantly, she felt seen, supported, and capable again.

What sets Mr. Burrus apart is the heart he puts into his work. I know he will lead a strong, student-centered school because he already leads his classroom that way. He understands what children need to be successful—not just academically, but emotionally. He creates an environment that motivates, encourages, and challenges students all at once. Watching him work with multiple students at a time, giving each one exactly what they need, feels like a superpower. The impact he made on my daughter was so strong that she still holds every teacher to the bar he raised with such grace.

Nashville families would truly benefit from a school like The Gate School under Mr. Burrus's leadership. When a school is built by someone with genuine passion, skill, and commitment to student success, the entire community wins. Parents want their children to learn, grow, and feel excited about their education, and that's exactly what Mr. Burrus brings. I wish more teachers were like him, but I also know that with a school he leads, more families will get to experience the joy, brighter education, and strong guidance that he consistently provides.

I am proud to support Mr. Burrus and confident that The Gate School will be a place where students flourish because of the foundation he creates.

Sincerely,

Chantal Stewart

John Wyse
Parent
490 Rochelle Drive, Nashville TN 37220
615-509-3943
john.w.wyse@gmail.com
Dec 29, 2025

To Whom It May Concern,

As a parent, I am writing in full support of *The Gate School* and its vision to bring a world-class public middle school to West Nashville. Families like mine need more high-quality options that both challenge and support students, schools that believe in their potential and invest in the power of great teaching.

As a former teacher myself, I know how much teachers believe in kids and want them to succeed. At the same time, the job can become so demanding and exhausting that many teachers go into survival mode without proper support. The Gate School is committed to supporting teachers so they can do the job well and focus on what matters–honing their craft, developing real relationships with students, and facilitating engagement with rigorous content.

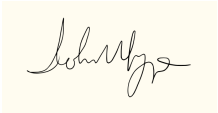
What excites me most about *The Gate School* is its commitment to excellence in teaching and learning. Every student will be known, supported, and pushed to grow academically and personally. The school's focus on collaborative, discussion-based learning and the purposeful use of technology reflects what today's students truly need to thrive in high school and beyond.

As a parent of two children about to enter the Nashville public school system, I especially appreciate The Gate School's focus on getting and retaining great teachers. Great teachers are the foundation of any great school, and all other goals follow from this foundation.

I believe *The Gate School* will be a valuable addition to our community, a place where teachers are empowered, families are engaged, and students are inspired to pursue the harder right over the easier wrong.

I fully support the approval and opening of *The Gate School* and am confident it will make a lasting, positive impact on Nashville's students and families.

Sincerely,
John Wyse



To Whom It May Concern,

I am writing to express my strong support for the establishment of a new charter school in our Bellevue community. As a resident who cares deeply about the quality of education available to local families, I believe this school would offer meaningful benefits to students and to our broader community.

My husband and I raised four children in Bellevue who all attended Harpeth Valley Elementary School. Our oldest then attended Bellevue Middle School for one year. Due to concerns during his first year, we opted to transition all of our children to private schools. This was a challenging family decision but one we felt necessary to offer our children a solid educational footing.

One of the most significant advantages of a new charter school is the opportunity it creates for greater diversity and inclusion**.** Many families in our area feel compelled to turn to private schools in search of smaller class sizes or specialized programming, but these private institutions often lack the demographic diversity that enriches a child's learning experience. A charter school can provide those same high-quality educational opportunities while welcoming a broader and more representative student population.

Another important consideration is the cost difference between charter schools and private schools**.** Private school tuition has become increasingly unaffordable for many families, placing high-quality education financially out of reach. Our family made many sacrifices to continue to send our children to private schools. By contrast, a charter school offers families a tuition-free alternative without sacrificing academic rigor or innovative learning environments. This allows parents to make choices based on their children's needs rather than financial limitations.

I believe that opening a new charter school in our local area would be a valuable and positive addition to our educational landscape. It would expand access to high-quality education, promote diversity, offer families a more affordable option, and address important safety concerns. I wholeheartedly support this initiative and hope to see it move forward.

Thank you for your consideration.

Sincerely,

Kelly Foster

Kelly Foster
5716 Traceside Dr
Nashville, TN 37221
Bellevue Resident 25 years

To Whom it may concern,

Mr. Burrus Cox was an exceptional math teacher he was patient, skilled, and always committed to helping every student understand the material. His ability to connect with kids in every possible way, both academically and personally, set him apart. He created a classroom environment where students felt confident, supported, and motivated to succeed.

Charter school has been a saviour to my family and I truly believe that Mr Cox is capable of doing great things with bringing a new charter school to TN. His dedication, passion, and leadership will allow him to build a school that puts students first and provides strong academic opportunities for all families.

I believe that with his vision and commitment, this new charter school will be a powerful addition to our community and a place where many students can flourish as did for my children.

Hangama Wahidi

Dear Review Committee,

I am writing as a parent in Nashville to express my strong support for The Gate School's charter application and the need for more thoughtful, high-quality middle school options in our community.

As a family navigating the transition into middle school, we have experienced firsthand how challenging it can be to find the right fit. In Nashville, many middle schools are large and can feel overwhelming during a developmental stage when students need more individualized support. Class sizes, limited access to enrichment, and varying levels of academic rigor can make it difficult for children to stay engaged and confident. Additionally, families often face complicated zoning and lottery systems, which can limit access to schools that best match their child's needs. I give tours at Percy Priest elementary and one of the main questions I hear from parents is "What do people do after Percy Priest?" It's a huge concern for parents, especially for ones that can't afford private education and, more often than not, people leave Davidson County to move to Williamson because it's a sure path.

One of my greatest concerns is the social and emotional transition that happens during the middle school years. This is such a critical time for identity, confidence, and independence. In many traditional settings, there is not enough emphasis on mentorship, executive functioning skills, or intentional community-building. As a result, students can easily feel lost, overlooked, or disengaged. As a mom who lives right next to our zoned middle school, JT Moore, the fights I hear from the track on the playground with no supervision around are real and scary. I have called my husband several times and said "we are not going to our zoned middle school, the school is too large for there to be good leadership and supervision of these kids in some of the most formative years of their lives."

By the end of middle school, I want my child to be not only academically prepared, but also confident, self-motivated, and equipped with strong communication and problem-solving skills. I want them to feel known by their teachers, challenged in a supportive way, and inspired to love learning.

Current options do not always fully meet these needs. While there are strong schools in Nashville, there remains a gap for families seeking a smaller, more personalized environment that prioritizes both academic excellence and whole-child development. Flexibility, innovation in teaching, and a strong sense of community are not consistently available across Nashville Tennessee and especially for middle school choices. I am a speech therapist that travels to several surrounding schools and teachers are becoming overwhelmed by the numbers and struggling to keep the quality of education they have been able to in the past. The fact that The Gate School is going to pay teachers 30% more than metro while giving academic authority over school decisions is very exciting to them!

We also need to take into consideration Nashville's growth as a city. It ranks in the top 10 of the nation's top growing metro areas. 9,000 of those new residents each year are in Davidson County. This puts more pressure on housing, schools, and infrastructure. Nashville must be prepared for this growth. If we are not prepared, then there will be overcrowding in public schools and the zoning/lottery systems gives limited control for families to choose what school fits their students' needs.

What stands out most about The Gate School is its intentional approach to addressing these gaps. Its focus on small class sizes, discussion-based teaching giving students a voice, meaningful relationships between students and teachers, and a balanced emphasis on academics and character development would be incredibly valuable—not just for my family, but for many others in our community. A school like this has the potential to provide a much-needed bridge during the middle school years, helping students thrive both academically and personally.

Thank you for considering this application and for your commitment to expanding high-quality educational options in Nashville.

Sincerely,

Alise Gregory M.S. CCC-SLP

May 10, 2026

Nashville, Tennessee

RE: Letter of Support for The Gate School Charter Application

To Whom It May Concern,

I am writing to express my strong support for The Gate School, a proposed charter middle school for students in grades 6–8 that would bring the Harkness method of instruction to public school students in Nashville. I write from a perspective shaped by two decades in the classroom: I have spent twenty years teaching English at the Ensworth School, while my husband has served for twenty-five years as a public school teacher at Harpeth Valley Elementary in Bellevue. We have four children–a 23-year old, an 18-year old, and our 9 and 10-year olds, who currently attend Harpeth Valley. As teachers, parents, and long-term residents of Bellevue, we are personally invested in the middle school options available to families in our community. I urge you to reconsider this charter application and to recognize what The Gate School would offer Nashville's students.

The Harkness method is far more than a classroom discussion. In a traditional class discussion, the teacher poses questions, calls on students, and guides the conversation toward predetermined conclusions. Students speak when spoken to, and the teacher remains the intellectual authority in the room–the one to look to for the answers. Harkness fundamentally reimagines this dynamic. Students sit together around a shared table as equals, responsible for driving the inquiry themselves. They pose questions, build on one another's ideas, respectfully challenge interpretations, struggle productively and openly, and arrive at understanding through genuine collaboration. The teacher serves as a facilitator of purposefully scaffolded lessons and activities, but the students learn that they are responsible for unpacking the material, learning what they do and don't know, and building knowledge. The effect on students is profound. Because they must articulate their thinking in front of their classmates, students build confidence in their own voices. Because they must listen carefully to respond thoughtfully, they develop the kind of deep, attentive listening that is increasingly rare in our culture. Because no single person dominates the conversation, students learn the habits of civil discourse—how to disagree with grace, how to change their minds when persuaded by evidence, and how to hold space for perspectives different from their own. Perhaps most importantly, the Harkness model cultivates genuine intellectual curiosity. When students experience their own ideas as worthy of serious consideration by their peers, they begin to see learning not as something done *to* them, but as something they

pursue. These are precisely the skills our young people need in order to become thoughtful citizens and engaged members of their communities.

The West Nashville and Bellevue corridor is one of the fastest-growing areas in the city, and the need for local, public middle school options has not kept pace with that growth. For example, McCrory Lane alone has two large-scale apartment complexes that have opened in the past two years and multiple single-family neighborhoods that have opened within the past five years, and more apartments and condos are currently being built on Charlotte Pike. Our family lives in this community, and we see it every day—new neighborhoods, new families, and new children who deserve access to excellent public education close to home. The Gate School would provide families in this area with a distinctive and rigorous middle school choice, one rooted in a pedagogy with a proven track record of developing engaged, capable learners. Approving this charter would be an investment in a part of Nashville that is ready for it and deserving of it.

I want to speak directly to the relationship between The Gate School and the Ensworth School, where I teach and where the founder, Burrus Cox, was a student. Ensworth employs the Harkness method, and I have witnessed firsthand how transformative it is for young learners. I have watched students who arrived quiet and uncertain become confident, articulate thinkers over the course of a school year—not because someone told them what to think, but because they were trusted to think for themselves. However, Ensworth is an independent school, and the Harkness experience it offers is available only to families who have the financial resources and connections to access private education. Ensworth School's tuition is close to $40,000 a year, and even if families apply for the vouchers to send their children to private school, the funds offered by the vouchers wouldn't make a dent in the tuition. That is precisely the problem The Gate School seeks to address. Students should not have to leave the public school system in order to learn in an environment that honors their voices and develops their capacity for independent thought. The Harkness method should not be a private school luxury—it is a powerful instructional approach that belongs in public education, and The Gate School would make it accessible to any family that wants it for their child.

As an educator, a parent, and a member of the West Nashville community, I respectfully ask you to approve The Gate School's charter application. Our students deserve this opportunity.

With gratitude for your consideration,

Dr. Dina Marks
7416 Huntwick Trail
Nashville, TN 37221
(615) 564-0864

Attachments 1.8 E

Co-Workers

Letters of Support

Evidence of Community Engagement

Ariana Winton

Middle School Teacher

11/20/26

To Whom It May Concern,

I am writing to express my enthusiastic support for The Gate School, as well as my deep admiration for the remarkable educators who represent its mission, one of whom I had the honor of working closely with, Mr. Burrus Cox.

During our time as co-teachers, Burrus was an absolute joy to partner with each day. His presence in the classroom was consistently uplifting, driven by a genuine passion for children and their personal growth. Burrus strikes a beautiful balance. He challenges students to become the very best versions of themselves while simultaneously showing them endless love, grace, and patience.

What sets Burrus apart is his unwavering dedication to the whole child. For him, success extends far beyond academic achievement. He is intentional about nurturing confidence, character, and emotional well-being. His consistency fosters a classroom environment where both students and colleagues feel safe, supported, and understood. It is no surprise that trust and respect naturally follow him wherever he goes.

The love and dedication Burrus pours into everything he does is overwhelmingly amazing to witness. He taught me one of the most meaningful lessons of my career: always do what is right simply because it is right, not for acknowledgement and reward. This principle guided our partnership and allowed us to become a truly iconic teaching duo, working together to make school, and especially math, more enjoyable and accessible for all learners.

Anyone who has the opportunity to encounter Burrus Cox should consider themselves extremely blessed. He embodies the values and integrity that The Gate School stands for. In fact, the concept of “entering through the narrow gate” holds a deeper and more personal meaning to me because of the example he set each day.

The Gate School is fortunate to be aligned with such a transformational educator. With Burrus contributing to its mission, I have full confidence that countless students will continue to be inspired, empowered, and deeply cared for.

Thank you for your time and consideration. Please do not hesitate to reach out if I can provide any additional insight or support.

With the utmost respect,
Ariana Winton

Keldriesha Davis
5700 Crossing Blvd Apt 3110
Antioch, TN 37013
keldrinesha.davis@gamil.com
334-207-1980
December 1, 2025

To the Members of the Board of Education,

I am writing to offer my strongest recommendation and full support for **Mr. Burrus Cox** as he seeks approval to open and lead his own school. I had the privilege of working closely with Mr. Coxx at **Nashville Academy of Computer Science (Republic Charter Schools)**, and I can confidently say he is one of the most exceptional educators and leaders I have encountered in my career.

Together, we served as **8th grade math teachers**, collaborating daily to plan rigorous lessons, analyze student data, and create an environment where all learners could excel. Throughout our time as colleagues, Mr. Coxx consistently demonstrated outstanding instructional expertise and a deep commitment to student growth. Our lessons were dynamic, engaging, and aligned with high expectations, and our students responded. Year after year, they achieved remarkable academic gains, and Mr. Cox played a central role in that success.

What truly sets Mr. Coxx apart is his ability to reach students on every level academically, socially, and personally. His classroom was a space where students felt supported and challenged. He had an incredible gift for breaking down complex math concepts, making them accessible and meaningful to every learner. His dedication was evident in everything he did: arriving early, staying late, driving students forward every single day, and consistently going above and beyond to ensure they succeeded.

In addition to being a phenomenal teacher, Mr. Cox is a **natural leader**. He inspired both students and colleagues through his professionalism, consistency, and unwavering belief in the potential of every child. Whether he was supporting a teammate, leading initiatives, or providing mentorship, he always elevated the people and the environment around him.

I have no doubt that the school Mr. Cox envisions will reflect the same excellence, structure, and student-centered approach he brought to our team. He possesses the expertise, integrity, passion, and leadership required to build a high-performing school that will positively impact students and the broader community.

I wholeheartedly support Mr. Burrus Cox in this endeavor and strongly encourage the Board to approve his proposal. Please feel free to contact me if you need any additional information.

Thank you for your time and thoughtful consideration.

Sincerely,
Keldrinesha Davis

To Whom It May Concern,

I am honored to write this letter of support for Burrus Cox, who has announced plans to found The Gate School, a charter middle school grounded in the vision articulated at thegateschool.org. Having served as Burrus' Principal at East End Prep, I can confidently say he brings the leadership, pedagogical expertise, and relational strength needed to realize The Gate School's mission.

From our earliest conversations, it was clear that Burrus deeply believes that great teaching is transformative, independence and communication are foundational to learning, and educators should walk alongside students through the "narrow gate" of challenge with integrity. In his teaching, Burrus consistently demonstrated both mastery and humility. He champions student-centered learning and cultivates inquiry, student voice, and discussion — practices that mirror The Gate School's use of Harkness-style dialogue to help students collaborate, debate, and express ideas clearly. Burrus skillfully scaffolds questions, draws out quieter voices, and honors diverse perspectives, ensuring all students engage meaningfully in academic discourse.

As a leader, Burrus reflects the school's "Teaching First" model, maintaining close connection to students while setting a high bar for instructional excellence. He actively seeks feedback, models reflective practice, and promotes a growth mindset among colleagues. While holding high expectations, he leads with compassion and encourages team members to think deeply.

Burrus also understands that education thrives through strong partnerships with families. He builds trust through consistent communication, active listening, and genuine collaboration, always centering what students need academically and socially. His belief that families are true partners — not just stakeholders — strengthens the school communities he serves.

Finally, Burrus exemplifies the "narrow gate" values of discipline, courage, and integrity. He is a steady, principled presence who models resilience and strong character. His leadership will help create a school culture that is both academically rigorous and deeply grounded in virtue.

I give Burrus Cox my strongest endorsement. His vision, experience, and values make him uniquely suited to launch The Gate School in a way that remains faithful to its ideals of great teaching, student independence, meaningful communication, and moral character. He has my full confidence, and I look forward to the impact The Gate School will have under his leadership.

Please feel free to contact me if you would like any additional information.

Sincerely,
Laura Damon
Director, Instructional Support
laura.damon@instructionpartners.org

To Whom It May Concern:

It is my pleasure to write on behalf of Burrus Cox. I got to know Burrus as a first-year teacher at a charter middle school in North Nashville. To say that year challenged us would be an understatement: that academic climate and experience not only pushed us as educators, but created the seeds of change that have now grown into the Gate School..

Watching Burrus those early days had me scratching my head—here was a man who could have chosen a seemingly much easier path away from education, walked away with a much larger paycheck and far fewer worries. However, I watched as he tried again and again to educate a population of students that society had already marked for failure. That first year tested all our resolve, but having Burrus as a teammate made all the difference. If he was willing to stay and show up for those students, so were we. His natural leadership qualities shone during the darkest of times without ever demanding or belittling those who worked alongside him, and got us through more than one difficult moment. Without him, our team would have floundered. With him, we earned the trust of 100 teenagers who had never before been able to believe that teachers would stick around for them and believe in them. Burrus made them believe.

Fast forward nine years and I still see the passion and resolve Burrus had that first day of school. I have had the pleasure of watching him grow his own individual pedagogy, as well as witnessed him inspire other educators to put in the same amount of energy, love, and consistency he does every day. In a time when education is desperate for great teachers, Burrus will undoubtedly answer that call. It is an honor calling him a friend, a colleague, and a leader.

Natalie Nikitas
AP US History Teacher
Valor College Prep

December 3, 2025

To Whom It May Concern:

It is truly an honor to be writing this letter on behalf of Burrus Cox and his commitment to the development of The Gate School. I have had the privilege of knowing Burrus for over 8 years, working with him for seven years across two different school communities. From his first day in the classroom as a teacher to the first day working to open a new school, I have seen Burrus wear many hats in education. I have seen him teach 7th graders his first year teaching, and then advocating to loop up with them to 8th grade his second year. I have seen him be a football coach and a soccer coach. I have seen him switch schools and communities through COVID and build relationships through Zoom. I have seen build relationships among staff as a Grade Team Lead, creating one of the strongest grade teams– professionally, academically and relationally. Most importantly, I have had the incredible opportunity to watch this idea of The Gate School from a small seedling, years ago, come to fruition and blossom into what he is working toward today.

To have “Mr. Burrus” as a teacher and a coworker is an extremely unique and precious opportunity for staff and students alike. To know Burrus Cox is to be motivated by Burrus Cox, which is not only demonstrated by his abilities as Grade Team Leader, but also by his TCAP Achievement and Growth year after year. Burrus truly believes in greatness in education, and encourages the adults he works beside and the students he teaches to do the same. He encourages a great desire in oneself to succeed– and when coupled with excellent teaching– he is able to transform many students, who have been doubted by many before, to succeed seamlessly. Watching Burrus form relationships with students is not just excellence, it is truly beautiful. He leads with love, grace, humility, humor, and understanding. He also leads with transparency, excellence, high expectations, and a true belief of those in front of him. Students and teammates feel this– and know this– and do better not just for themselves, but for the love he extends each and every day.

In addition to Burrus’ commitment inside a classroom, he demonstrates a desire to create community and belongingness in any setting he is present in. He has attended countless sports games, school plays, graduations, awards ceremonies... He has volunteered for–without hesitation but with genuine desire– for field trips, school lock ins, staff and student sports games, coaching opportunities, staff bonding opportunities… He has a dedication to building a strong community and I can already see him bring that same enthusiasm to his plan and expectations within The Gate School.

Burrus does not just *care* about education, he embodies all that it means to fight for the best in education. He cares about all stakeholders involved in this fight on the deepest and most genuine level and will stop at nothing until children have the best they deserve. I am grateful to know the Burrus years ago who crafted a small idea on what a great school might look like, and even more grateful to watch that small idea turn into a multi-faceted, unique opportunity for the best education in Nashville communities, called The Gate School.

Paige Dudek
LEAD Cameron
Green House Science Teacher

Caroline Rhodes
East End Prep
Director of Talent
crhodes@eastendprep.org
11-25-2025

To Whom It May Concern,

As a community member and fellow educator in Nashville for the last 17 years, I am proud to support *The Gate School* and its mission to create a middle school that centers on great teaching, meaningful relationships, and the pursuit of excellence. The school's innovative staffing model and emphasis on collaboration set it apart as a place where both students and teachers can thrive.

The number one driver of student achievement is great teaching and I've seen firsthand how Burrus Cox and Jim Leckrone, two dynamic teachers and leaders, cultivate a culture that empowers teachers to lead and innovate. Students will thrive under their direction, and this school's structure will undoubtedly put students on a trajectory of excellence that does not currently exist in MNPS middle schools in our city.

I strongly support The Gate School's approval and believe its model will elevate both student outcomes and the teaching profession in Nashville.

Sincerely,
Caroline Rhodes
Caroline Rhodes

Shelly Gaughan
Multilingual Coordinator
Nurses MC Nashville
sgaughan@nursesmcnashville.org
November 20, 2025

Dear Bellevue Community,

My name is Shelly Gaughan and I am an administrator, educator, and longtime Bellevue resident. I have had the pleasure of serving the Bellevue community in many aspects, from a special education teacher to a general education teacher, from a volunteer for many organizations to an employee of many different businesses throughout my life here in Nashville. I am thrilled to support The Gate School and its endeavor of being a top choice for Bellevue middle school students.

As an educator who has served many different roles in a variety of public and charter school settings, I find the Gate School's vision of combining high-quality of teachers and instructors with innovative experiences, like the Harkness table and AI-integration, not only exciting for Bellevue students but an educational option that is not present currently. I am intrigued by the onus that all adults have in the building with instructing students. This 'all-in' approach demonstrates to our community that The Gate School appreciates the critical need for all adults to have a hand in shaping student outcomes. It is also equally exciting that The Gate School is being thoughtful in embracing the technological edge that AI is providing and allowing students to harness its usefulness for their own educational gain.

As someone who has also been blessed to serve alongside Mr. Cox at a prior school, I can vouch firsthand how soft skills are actually the backbone of his teaching practice. Emphasis on teamwork, communication, problem-solving, and creativity were as highly revered as a thoughtful mathematical explanation. The prominence that creativity and independence will have as a pillar of The Gate School show that Mr. Cox and The Gate School team understand that this essential skill development will support Bellevue students in exceeding school and state mastery expectations.

I am excited to put my full support in The Gate School as an option for Bellevue students as they navigate these next chapters in their educational journey and I am confident in its success in combining high-quality teaching with groundbreaking AI integration and soft-skill instruction.

Sincerely,

Shelly Gaughan

November 30, 2025

Subject: The Gate School Letter of Support

I am writing in support of Burrus Cox's charter application for The Gate School. As Assistant Principal at Valor Voyager Academy in Nashville, Tennessee, I had the privilege of coaching Burrus Cox for one year, serving as his academic school leader, instructional coach, and intellectual preparation lead. I am in my ninth year in education and sixth year coaching teachers, having held instructional coaching and assistant principal roles in Tennessee and Oklahoma. I have worked with and directly supported numerous charter schools through my time on staff at Teach for America, as well as serving as a founding Assistant Principal at Tulsa Honor Academy's Flores Middle School.

Through this lens of diverse educational experience—and particularly through my four years at Valor working alongside talented educators like Burrus—I can say with confidence that he exemplifies the qualities necessary to become an exceptional school leader in Nashville, one who will create transformative learning environments for both students and teachers.

What sets Burrus apart is his unwavering commitment to strong basic teaching practices centered on student relationships. Burrus has a simple vision that many charters have tried to build schools upon, yet frequently fall short. What separates The Gate School from other charters is its foundation in believing in the competence and goodness of people, not just in following a strong curriculum and telling teachers to build relationships. I have seen this firsthand in Burrus' classroom. He built a classroom culture where mathematics feels inclusive and accessible, where students are accepted and loved regardless of their academic outcomes. This isn't just philosophy for Burrus—it's practice. Each year, he reads "You Are Special" by Max Lucado to his students, using the story to establish why he teaches and why working with young people matters deeply to him. Throughout the year, he gives students their own copies of this book as a special award when they demonstrate perseverance and authenticity. This simple ritual creates something powerful: an environment where students feel safe enough to take risks, valued enough to push themselves, and loved enough to believe they can succeed.

The impact of this approach cannot be overstated. When students feel genuinely seen and valued, they want to try more and do more. Burrus will take that understanding and make it a core principle of The Gate School.

Burrus Cox's educational philosophy is refreshingly grounded. While education often chases the latest trends, Burrus remains anchored in what actually works: building emotionally consistent relationships and focusing relentlessly on the basics of good instruction. His approach centers on getting students to think deeply, creating space for student lift, and helping students build executive functioning skills through structured note-taking and organizational systems. He balances his own think-alouds with student voice, modeling mathematical thinking while giving students agency in their learning. And he understands that mastery requires practice—lots of it—so he provides students with multiple opportunities to engage with content.

This simplicity is deceptive. It takes a masterful teacher to resist overcomplication and to trust that, when done well, the fundamentals produce exceptional results, including a 100% pass rate on our Algebra EOC state exam and a TVAAS level 5 outcome in 8th-grade math.

Burrus Cox's impact extends far beyond his own classroom. He was a source of consistency and support for teachers throughout our network, particularly for those just beginning their careers. When working with a first-year math teacher who struggled with content understanding, Burrus brought the same simplicity-as-strength mindset that defines his teaching. He helped her understand the key concepts of each unit, modeled simple problem-solving approaches, and maintained a consistent thinking framework she could apply to any mathematical situation. When needed, he also took on additional work designing lesson modifications to improve accessibility for both his students and hers. What impressed me most was how Burrus balanced support with respect. He never tried to control the other teacher's practice. Instead, he gave her space to learn and apply his guidance, treating her as an equal and valuing her thoughts and ideas. This collaborative approach, generous with expertise but humble, is precisely what strong school leadership requires.

As Burrus' coach, I witnessed his ability to balance veteran confidence with genuine openness to growth. He was already well-acquainted with our curriculum and had created a strong educational philosophy. Yet, when we identified areas where lessons could better elevate student thinking, he embraced coaching to update his practice. He implemented concepts like the 5 Practices for Orchestrating Mathematical Discourse and the Mathematical Learning Routines. Eventually, his motivation to serve students better led him to independently explore and try resources from other curricula to strengthen his lessons and better embody his vision of student lift.

This willingness to evolve while staying true to his core values is rare and valuable. Burrus doesn't adopt new practices because they're trendy—he adopts them because they serve students better.

As Burrus Cox continues to learn about new models of schooling and develops The Gate School, I am confident he will merge innovative practices with the traditional, bread-and-butter best practices that have made him an exceptional teacher. His passion for creating learning environments that actually work for kids will naturally expand to the teachers he leads. He understands that great schools are built on great teaching, and that great teaching comes from educators who feel supported, respected, and empowered to grow—the same conditions he creates for students in his classroom.

Nashville needs school leaders who can balance innovation with proven practice, who lead through collaboration rather than control, and who never lose sight of why we do this work: to see, value, and develop every student and every teacher. Burrus embodies these qualities, and he will bring them to bear in building The Gate School into a community that transforms lives.

I support Burrus Cox's charter application and am happy to discuss his qualifications further. Please feel free to contact me if you have any questions.

Sincerely,

Christina Naramore
Assitant Principal
cnaramore@valorcollegiate.org

Attachments 1.8 F

Facility Partners

Letters of Support

Evidence of Community Engagement

HMK
ARCHITECTS PLLC

January 2, 2026

Metro Nashville Public Schools
Charter Review Committee
2601 Bransford Avenue
Nashville, TN 37204

RE: Letter of Support for The Gate School Charter Application

To the Charter Review Committee:

As a lifelong Nashvillian and Principal of a local architecture firm that has worked extensively with schools and mission driven organizations, I am writing in strong support of The Gate School and its application to serve students in Nashville.

I recently had the opportunity to hear founder Burrus Cox present The Gate School's vision. His commitment to academic excellence, supported by strategic staffing, high impact learning, and thoughtful integration of technology, reflects a clear and disciplined approach to school leadership. The school's instructional model, including the use of the Harkness method, demonstrates an intentional focus on student engagement, critical thinking, and discourse that aligns well with preparing students for long term success.

As architects who specialize in educational environments, we regularly see how closely a school's academic model and physical environment are connected. The Gate School's emphasis on discussion based learning and emerging technologies requires deliberate planning, flexibility, and alignment between pedagogy and space. From my professional perspective, the clarity of The Gate School's instructional vision positions it well to make responsible and effective decisions as the school develops its facilities.

The Gate School represents an exciting opportunity for Nashville students and families. I strongly support the approval of its charter application and encourage the committee to view this school as a thoughtful investment in academic excellence and the future of our city.

Sincerely,

HMK ARCHITECTS PLLC

Logan Newton, NCARB, AIA

ARCHITECTURE
INTERIORS
M Z A

516 HAGAN STREET SUITE 100 NASHVILLE, TN 37203 T 615.256.2880 MZARCH.COM

Chris Riley
Architect, Co-Owner
MZA Architecture and Interiors
516 Hagan Street, Suite 100
Nashville, TN 37203
criley@mzarch.com
615-256-2880 x116
January 22nd, 2026

To Whom It May Concern,

I am writing this letter to express my support for The Gate School; a proposed public charter middle school planned for Nashville in 2027.

MZA has had the pleasure of working with many public charter schools in and around Nashville, and a number of these projects were founding locations. Strong founders with strong vision are common in each of our successful educational projects, and I support The Gate School because I believe in its founder's vision.

I had the opportunity to meet Burrus Cox several weeks ago, and he presented the teaching model he plans to implement at The Gate School. His model is based on The Harkness method and encourages student collaboration and critical thinking. These skills are often overlooked in public schools and are critically important as young people transition from middle to high school.

Mr. Cox's previous educational accomplishments go without saying, and he has already led local Nashville students to academic success. Between this pedigree and the potential of The Gate School's proposed teaching model, I am confident that The Gate School will have a positive impact on Nashville and am proud to support their vision.

Sincerely,

Chris Riley
Architect, Co-Owner
MZA Architecture and Interiors

The Gate School – Letter of Support

Daniel Rebula
Senior Project Manager
DWC Construction
2014 Gladstone Ave
Nashville, TN 37211
Daniel.rebula@dwcbuilds.com
843-530-7007
1/22/26

To Whom It May Concern,

I am writing to express my support for The Gate School, a proposed public charter middle school opening in Nashville in 2027.

I support The Gate School because:

- I believe strongly in its student-centered, high-expectations approach to education and its focus on developing strong thinkers and communicators.
- I hope to partner with The Gate School as it grows and would welcome opportunities to collaborate through my organization and professional network.
- I believe Nashville needs more high-quality public school options that are innovative, inclusive, and deeply connected to the community.

I believe that The Gate School's vision and commitment to preparing students for success in school and beyond will have a lasting, positive impact on our city.

Sincerely,

Daniel Rebula

MOFFITT
BUILDERS

Ross Moffitt
Owner
Moffitt Builders, LLC
4205 Gallatin Pike
Nashville, TN 37216

5/13/2025

To Whom It May Concern:

I am writing to express my strong support for The Gate School, a Nashville-based charter school committed to cultivating student independence, effective communication, and academic excellence through outstanding teaching and the purposeful use of technology.

As a resident and business owner in Nashville, I understand the importance of preparing students not only for academic success, but for the demands of high school, career pathways, and an increasingly technology-driven workforce. The Gate School's mission to prepare every student for the high school and career of their choice reflects a thoughtful, forward-looking approach to education.

The Gate School's emphasis on student independence and communication skills is especially impactful. These competencies are critical for long-term success, whether students pursue college, technical training, or direct entry into the workforce. By pairing strong instructional practices with intentional technology integration, the school equips students with both foundational knowledge and practical skills that extend beyond the classroom.

Equally important is the school's commitment to high expectations and accountability. Purposeful use of technology, when guided by outstanding teaching, enhances learning, personal responsibility, and engagement, helping students take ownership of their academic progress while building confidence and adaptability.

The Gate School represents a valuable and innovative option for Nashville families. I fully support its mission and respectfully encourage continued authorization and support so the school may continue serving students and strengthening our community.

Thank you for your time and consideration.
Sincerely,

Ross Moffitt
Owner.
Moffitt Builders

CHASE
CONSTRUCTION GROUP
EST.1986
EMPLOYEE OWNED

1/8/25

To Whom It May Concern:

I have met with Burrus Cox, Founder of the Gate School and support the proposed principles of independent learning using the "*Harkness Method*" of student-centered teaching emphasizing the collaborative discussions and critical thinking.

Providing students with school's inclusion of the latest technology, they will become independent thinkers with strong communication skills. This offers the most effective preparation toward their complete education.

As a resident of Middle Tennessee and work experience with the same 40-year-old Nashville company, I understand these skills paired with strong institutional practices will ensure the students learn skills for their higher education pursuits as well as their future work force opportunities.

The Gate School Offers an excellent option for educating the next generation.

Thank you.

Sincerely,

John Morss
Chief Operating Officer

Chase Construction Group
3001 Armory Drive, Suite 200
Nashville, Tennessee 37204

Phone: 615-777-5900
Fax: 615-7774544
Toll Free: 1-800-924-2732
website: www.dfchase.com

Scott Gibson
Partner
True North Advisory
210 12th Ave S, Suite 210
Nashville, TN 37203

January 9, 2026

To Whom It May Concern:

True North Advisory is pleased to support The Gate School in Nashville and the school's efforts to expand educational opportunities in Nashville. The Gate School will foster student independence, strong communication, and academic rigor. Through the Harkness table learning model, students engage in collaborative, discussion-driven learning that builds confidence in public speaking, strengthens evidence-based reasoning, and develops the skills needed to thoughtfully discuss, debate, and collaborate. We recognize and support initiatives that seek to strengthen student preparedness, workforce readiness, and community development. Schools that emphasize strong communication and critical thinking can play an important role in helping students prepare for future careers across many professional fields, including architecture, construction, and engineering.

True North Advisory supports efforts to bring innovative educational options like The Gate School to Nashville and appreciates its commitment to student growth and community impact. We wish the school success as it works to serve students and families across our city.

True North Advisory is an Owner's Representative firm based in Nashville, Tennessee with a focus on commercial construction project management. Our partners' forty years of experience is firmly rooted in commercial, multi-family, and mixed-use projects in the Greater Nashville area. Our current project mix ranges from active industrial, education, hospitality, retail, and multi-family projects to preconstruction engagements for private clients, the State of Tennessee, and Metro Nashville. The establishment of our organization is based on the fundamental goal of leading the delivery of high-quality projects and ensuring that they are delivered exceptionally well.

Sincerely,

Scott Gibson
Partner
True North Advisory

Chris D'Amato
Chief Operating Officer
Matter Real Estate
cdamato@matterre.com | 908-358-2281

December 2, 2025

To Whom It May Concern:

I am writing on behalf of Matter Real Estate to express our strong support for The Gate School, a proposed public charter school opening in Nashville in Fall 2027. The Gate School's mission – to provide rigorous, relationship-centered instruction that empowers every student to meet and exceed high expectations – represents a compelling and much-needed addition to the public school options available to Nashville families. The school's commitment to cultivating student independence, effective communication, and academic excellence through outstanding teaching and purposeful use of technology illustrates the thoughtful design of a model that prepares every student for the high school and career of their choice.

Matter has partnered with charter schools across the country to solve complex facilities challenges and secure high-quality learning environments for students. In Nashville specifically, we have supported charter organizations in identifying and securing incubation spaces, overseeing renovation scopes, and ultimately guiding them into long-term permanent facilities. Based on our conversations with The Gate School's leadership and our understanding of their model and timeline, we are eager to partner with the school in that same capacity.

We are particularly inspired by the strength and vision of The Gate School's founding leader, Burrus Cox. His track record of exceptional student outcomes in the classroom is exactly the kind of instructional excellence that Nashville needs at scale. Burrus not only consistently drives high achievement, but he does so by fostering genuine belief in students' capabilities and equipping them with the independence and communication skills that The Gate School's model prioritizes. His ability to deliver transformative results in his own classroom is exactly the type of leadership that should be coaching, developing, and inspiring an entire school of teachers to believe in students and help them reach the outcomes they are capable of.

Our intended partnership with The Gate School would include:

- **Identifying a suitable incubation site** for the school's launch year, including market screening, feasibility testing, and early landlord engagement.
- **Managing renovation or build-out work** to ensure the incubation facility is safe, student-ready, and aligned with The Gate School's programmatic needs.
- Leading the search for a long-term home, including full end-to-end site analysis, financial modeling, and coordination with lenders, architects, and contractors through delivery.

With strong leadership and an aligned facilities strategy, The Gate School is well positioned to make a meaningful and lasting contribution to students and families across Nashville. Matter Real Estate looks forward to supporting their efforts as they build a high-quality, mission-driven public school community.

Sincerely,
Chris D'Amato

Attachment 2: School-based Team Resumes

BURRUS COX

CONTACT

615-330-8495
Nashville, TN
burrus@thegateschool.org
thegateschool.org

EDUCATION

RELAY GRADUATE SCHOOL OF EDUCATION
Masters in Art of Teaching
2017-2019

VANDERBILT UNIVERSITY
Bachelor in Child Development
2015-2018

SKILLS

- Teacher Leadership & Coaching
- School Design & Strategic Planning
- Data-Driven Instruction
- AI Integration & Digital Learning
- Curriculum Development & Alignment
- Harkness Based Learning
- Community & Family Engagement
- Staff Development & Retention Strategy

ABOUT ME

Innovative education leader and school founder with a proven record of driving exceptional student outcomes . Across multiple schools in Nashville, consistently led classrooms where students achieved academic growth in the top 3% statewide, reflecting excellence in both instruction and student engagement. Experienced in teacher leadership and instructional innovation, with a deep belief in the transformative power of great teaching. Currently founding The Gate School, a 6–8 public charter school designed to elevate teacher quality, student independence, and the purposeful use of AI in learning.

WORK EXPERIENCE

FOUNDER

The Gate School – Nashville, TN | July 2025 – Present

- Leading the launch of a 6–8 public charter middle school opening in Fall 2027, built on the pillars of outstanding teaching, student independence, purposeful technology use, and family partnership.
- Designing an innovative staffing structure where every adult teaches daily, fostering shared ownership and leadership development.
- Developing academic, operational, and AI literacy frameworks in partnership with The Nashville Incubator.
- Overseeing community engagement, fundraising, and early-stage organizational development.

FELLOW

Nashville Incubator – Nashville, TN | July 2025 – Present

- Selected for a competitive fellowship supporting innovative school founders.
- Collaborating with leaders and mentors to refine The Gate School's instructional model, staffing framework, and community engagement strategy.
- Conducting extensive research and school visits to inform best practices in teacher-led innovation and AI-integrated instruction.

MIDDLE SCHOOL MATHEMATICS TEACHER

Valor Collegiate Academies – Nashville, TN | June 2024 – May 2025

- Taught middle school mathematics emphasizing conceptual understanding and data-driven instruction.
- Collaborated in professional learning communities to enhance instructional rigor and alignment with schoolwide character development model.
- Delivered student growth in the top 3% of Tennessee and 100% proficiency rates on Algebra 1 EOC exams.
- On the 2025 MAP NWEA Test students grew in the 77th percentile nationwide and made 210% percent of projected growth signifying that students made over 2 years worth of growth in 1 year.

EXPERIENCE CONTINUED

8TH GRADE MATH TEACHER & GRADE-LEVEL LEAD

East End Prep – Nashville, TN | June 2020 – May 2024

- Served as grade-level lead, mentoring team members, coordinating academic and culture initiatives, and driving continuous improvement cycles.
- Led data and instructional planning meetings
- Achieved a level 5 TVAAS rating all 4 tested school years
- In 2022-2023 74% of my students achieved mastery on the Math TCAP which is significantly above the school average (38%), district average (26%), and state average of (38%)
- In the 21-22 and 22-23 school years students grew in the top 1% in the state
- During the 23-24 school year piloted the first honors class offered at EEP (Integrated Math 1) which saw 92% of students score proficient
- Over 4 years had a TVAAS value added index of 10.85 which is 10 times the district average

MIDDLE SCHOOL MATHEMATICS TEACHER

RePublic Schools – Nashville, TN | July 2017 – June 2020

- Consistently achieved the highest MAP and TCAP scores across the network, demonstrating exceptional instructional impact and data-driven practice.
- Earned designation as a Level 5 TVAAS Teacher, reflecting top-tier student growth and mastery outcomes.
- Designed and implemented engaging math lessons rooted in conceptual understanding and rigor.
- Mentored new teachers and supported schoolwide academic initiatives focused on student achievement and instructional excellence.

Jim Leckrone
Founding Principal | School Director | Instructional Leader
Nashville, TN jlleckrone76@gmail.com

Professional Summary

Transformational K–8 school leader with 25+ years in teaching and administration, including 15 years as Founding Principal and current School Director of East End Preparatory School. Recognized for founding and growing one of Tennessee's highest-performing open-enrollment charter schools serving a majority economically disadvantaged population. Demonstrated expertise in instructional leadership, data-driven improvement, operations management, and school governance. Skilled in faculty development, organizational systems, and community partnerships that consistently close achievement gaps and elevate student outcomes.

Professional Experience

East End Preparatory School — Nashville, TN
Founding Principal / School Director (2011 – Present)

- Founded East End Prep in partnership with the Martha O'Bryan Center; grew from 80 kindergarteners to 865 students (K–8).
- Built one of Davidson County's premier schools, maintaining top-quartile achievement while serving one of the city's highest economically disadvantaged populations.
- Three-time **Tennessee Reward School**; earned **Double Reward Status (2017)** – top 5 % statewide in both achievement & growth.
- Four-time *U.S. News & World Report* **Best Elementary and Best Middle School** honoree.
- Received an **"A" rating** on Tennessee's inaugural 2023 State Report Card.
- Led school to **#1 charter elementary in Nashville for Math and Science (TCAP 2023-24)**.
- Developed athletics & arts excellence: multi-year DCCSL championships and a 10-year Disney/TPAC drama partnership.
- Created a college-going alumni pipeline with graduates attending Vanderbilt, UT Knoxville, Belmont, TSU, Xavier, and more.
- Hosts **Building Excellent Schools (BES)** fellows annually as a national model for leadership development.

Williamson County Schools / Cheatham County Schools (1998 – 2011)
Assistant Principal / Mathematics Teacher

- Founding Assistant Principal at Independence High School; Assistant Principal at Hillsboro K-8.
- 8 years teaching math (Cheatham County High & Grassland Middle).
- **Teacher of the Year (2003-04)**; Mathematics Department Head and 8th Grade Team Leader (2001-04).

Leadership Training & Awards

- Relay National Principals Academy Fellowship (2014-15)
- Building Excellent Schools (BES) Weekend Warrior Series – multiple years
- Leveraging Leadership Institute (Class II, 2016-17) – Paul Bambrick-Santoyo
  • Gold-Certified Trainer in Observation & Feedback (2017)
  • Proof Point Award (2024) for gap-closing student outcomes
- Host Principal for BES Fellows – national training site

Education

Lipscomb University — *M.Ed., Administration and Supervision (2002-03)*
University of Tennessee, Knoxville — *B.A., Mathematics (1990-95)*

Key Achievements

- Designed & implemented data-driven instructional systems producing top-quartile growth.
- Built and retained a mission-aligned faculty with exceptionally low turnover.
- Established long-term community partnerships with Martha O'Bryan Center, TPAC, and local youth organizations.
- Created a holistic student experience integrating academics, arts, and athletics.

Attachment 3: Board Member Resumes



Todd Dickson

Founder & Chief Executive Officer
Nashville, TN

Professional Summary

Founder and CEO of Valor Collegiate Academies, a nationally recognized charter management organization based in Nashville, Tennessee. Todd has more than 20 years of experience in public charter education as a teacher, principal, executive director, and network founder. Under his leadership, Valor has become the highest-performing academic charter network in Tennessee and developed *Compass*, a comprehensive human development framework now scaling to more than 150 schools nationwide. Todd brings deep expertise in school launch, instructional leadership, organizational design, governance, finance, and culture-building.

Professional Experience

Founder & Chief Executive Officer
Valor Collegiate Academies | Nashville, TN
July 2012 – Present

- Founded and scaled Valor Collegiate Academies, a charter management organization focused on rigorous academics integrated with comprehensive human development.
- Built Valor into the top-performing academic charter network in Tennessee.
- Developed *Compass*, a nationally recognized culture and human development framework now adopted by 150+ schools across the country.
- Oversees network strategy, instructional vision, leadership development, finance, governance, and organizational sustainability.
- Leads school launch, executive talent development, and long-term growth planning.

Senior Fellow
Tennessee Charter School Incubator | Nashville, TN
June 2012 – June 2014

- Selected for a two-year senior fellowship to design and launch Valor Collegiate Academies.
- Received intensive training and support in school design, finance, governance, and leadership.

- Successfully launched the first Valor school in Fall 2014.

Fellow
Stanford Principal Fellows Program | Stanford, CA
June 2009 – June 2012

- Member of the inaugural Stanford Principal Fellows cohort.
- Participated in a three-year fellowship focused on effective public school leadership, organizational design, and instructional excellence.
- Collaborated with a national cohort of high-performing early-stage school leaders.

Executive Director & Board Member – Summit Preparatory Charter High School
Summit Public Schools | Redwood City, CA
June 2003 – June 2012

- Served as Executive Director and Board Member of Summit Prep, overseeing:
    - Instructional leadership
    - Budgeting and financial management
    - Human resources and professional development
    - Fundraising and development
    - Operations and community engagement
- Led Summit Prep to national recognition, including:
    - **Top 10 Transformational School in the U.S.** (Newsweek, 2011)
    - Ranked **#76–#118 Best High Schools in the U.S.** (Newsweek, 2008–2010)
    - **#84 Best High School in the U.S.** (U.S. News & World Report, 2010)
    - Featured as the only high school in the documentary *Waiting for Superman*
    - Earned a rare **10/10 rating on GreatSchools.org** (2010–2012)

Physics Teacher & Athletic Director
Summit Preparatory Charter High School | Redwood City, CA
June 2003 – June 2005

- Taught Physics to all Summit juniors, serving a student body that was approximately 60% students of color.
- Achieved **100% student pass rate** on the California State Physics Exam in year two.
- Students earned an average API score of **924/1000**, far exceeding state and district averages.
- Founded and expanded the athletic program from intramural soccer to a full varsity program with six competitive sports.

Science Teacher
Carlucci American International School of Lisbon (CAISL) | Lisbon, Portugal
June 2002 – June 2004

- Taught IB Physics, Conceptual Physics, middle school science, ELL science, and Design Thinking.
- Presented at multiple European education conferences (MAIS) on differentiation and collaborative learning.
- Co-led a two-week interdisciplinary middle school intersession integrating academics, design, and musical theater for 100 students.

Education

- **M.S., Education** – Stanford University
- **M.S., Electrical Engineering** – Cornell University
- **B.S., Electrical Engineering** – University of Denver

Honors & Distinctions

- Founder of Tennessee's top-performing charter network
- National recognition for school transformation and innovation
- All-American Lacrosse Player and Team Captain

DEMETRIA R. GILES
2161 Nolensville Pike, Unit 2-205, Nashville, TN 37211
702.890.9470 | demetria.giles@gmail.com



EDUCATION

The Pennsylvania State University, University Park, PA
B.A in Communications 2008
Areas of Concentration: Broadcast & Print Journalism
Minor: Sociology

ACCOMPLISHMENTS

Surge Institute Fellowship, 2023
Las Vegas Book Festival Literary Committee, 2019-2020
KIPP School Leadership Program, 2013
Penn State Washington Program for Communications & Democracy, 2007-2008
NBC News Channel Intern, Washington, DC, 2007-2008
John S. and James L. Knight Foundation Diversity Scholarship, 2004-2008
Phi Sigma Pi National Honor Fraternity, 2004-2008

LEADERSHIP EXPERIENCE

Director of Curriculum **| Nashville Teacher Residency (NTR)**
Dec. 2022 – Present

- Lead curriculum design and instructional strategy to prepare aspiring teachers for licensure and effectiveness in high-need schools.
- Facilitate professional learning for residents and mentor teachers, with a focus on culturally responsive pedagogy and equitable instruction.
- Develop and refine content for edTPA preparation, instructional coaching, and content-specific seminars.
- Integrate AI tools and innovative practices to support teacher development and performance.
- Collaborate with partner schools and organizations to align residency training with school needs and licensure requirements.

Director **| 9th Bridge School**
July 2017-April 2021

- Led all teacher and leadership PD for a private school backed by the Downtown Project and former Zappos CEO.
- Aligned annual goals with mission-driven focus areas (e.g., data-driven instruction, Habits of Mind, Making Thinking Visible).
- Revamped mission, vision, and values to center justice, equity, diversity, and inclusion (JEDI); developed supporting DEI trainings.

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Designed the school's educational model, teacher development framework, self-evaluation tools, core values guide, SEL blueprint, and feedback systems.

- Spearheaded project-based learning (PBL) implementation through targeted PD, structured meetings, and strengths-based feedback.
- Led top-of-funnel marketing strategy, crafting messaging for enrollment and recruitment; managed content for website, blog, and social media.

Senior Associate **| Ember Charter School (formerly Teaching Firms of America)**
Oct. 2013 – June 2017

- Developed paraprofessionals, co-teacher apprentices, and junior associates through data-driven coaching focused on culturally relevant and trauma-informed practices.
- Led weekly practice meetings and biweekly check-ins covering data analysis, instructional planning, inquiry-based learning, and feedback aligned with school frameworks.
- Designed and implemented a co-teacher apprentice check-in system aligned with the school's professional rubric, emphasizing stakeholder engagement, professionalism, and student outcomes.
- Fostered leadership and executive functioning in first-grade students through curiosity-driven, inquiry-based instruction.
- Promoted lifelong learning by cultivating a classroom culture of risk-taking, questioning, and peer-to-peer knowledge sharing.

Vice Principal **| KIPP DC: Promise Academy**
June 2013 – Oct. 2013

- Led development of 13 teachers through regular data-driven coaching, lesson planning, and observation feedback.
- Conducted classroom observations and facilitated leadership team, PD, and faculty meetings focused on instruction, culture, and collaboration.
- Designed and implemented the school's first long-term professional development plan, guided by student data, parent input, and teacher surveys.
- Built staff capacity around two core strands: instructional excellence (Learning Team) and school culture (Caring Family).
- Modeled school values during all community interactions and provided direct student/family support through academic, behavioral, and attendance meetings.

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Elementary Seminar Instructor **| Capital Teaching Residency**
June – Oct. 2013

- Designed and led PD for first-year co-teachers using backward planning aligned to instructional best practices and trends in high-need schools.
- Developed seminar objectives covering TLAC techniques, CCSS, data-driven instruction, cultural relevancy, child development, and growth mindset.

Professional Learning Community Chair **| Capital Teaching Residency** *2009 – 2012*

- Led a PLC for mentor teachers, facilitating text-based protocols, problem-solving, and leadership development to strengthen residency support.

Lead Literacy Teacher **(Pre-K–1st Grade)** | **KIPP DC (LEAP, Discover & Promise Academies)**
2008 – 2013

- Planned and delivered rigorous, standards-aligned ELA instruction to ensure college readiness; created inclusive, differentiated classrooms rooted in backward design.
- Modeled school mission through collaborative planning, responsive feedback, and consistent classroom management.

Saturday School Coordinator | **KIPP DC: LEAP Academy**
2010 – 2011

- Recruited and managed a 12-member team; resolved scheduling and parent concerns; partnered with HR for staffing, payroll, and compliance.

RELATED EXPERIENCE

Education Consultant **| SchoolED LLC**
2019 – Present

- Supports families, schools, and nonprofits with instructional planning, pedagogy, and SEL strategies.
- Provided remote learning interventions during the COVID-19 pandemic.

Founder & Moderator **| Homeschool on Clubhouse**
2021 – 2023

- Led weekly education discussions for a 5,000+ member community.
- Advised families on alternative education and parenting strategies during the pandemic.

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702.890.9470 | demetria.giles@gmail.com

Social Entrepreneur **| Urban Reading Space**
2012 – 2017

- Founded a nonprofit to promote youth literacy through reading spaces in urban areas. Echoing Green Black Male Achievement Semi-finalist (2013).

Teaching Assistant **(Sociology) | Penn State University**
2006 – 2007

- Supported curriculum and exam development; graded student work and facilitated class logistics.

Instructor & Mentor **| The AnBryce Foundation**
2005 – 2007

- Taught youth (ages 6–16) and provided mentorship through academic and enrichment programs.

Lead Teacher **| Minnieland Private Day School**
2004 – 2005

- Designed and led early childhood lessons focused on literacy, science inquiry, and exploration.

RELATED TRAINING & COURSES

Supermajority Education Fund's Majority Leaders
CCEI's Gender Bias & Stereotypes
Blockchain Basics (Coursera/UB/SUNY)
Smart Contracts (Coursera/UB/SUNY)

Harvard Extension School (Graduate Courses)

- GOVT E-1035 Money, Morals & Markets
- GOVT E-1045 Justice (Philosophical Frameworks for Morality)
- GOVT E-1368 Saving Schools: History, Politics and Policy in US Education
- MATH E-300 Mathematical Foundations for Teaching Secondary School Math
- MATH E-302 Math for Teaching Geometry

KIPP School Leadership Program Summer Institute & Intercession I (courtesy of the KIPP Foundation)

- Leading for Educational Equity
- Teach & Insist: Building Teams through Performance Management
- Decision Making for Results

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- KIPP Leadership Framework & Competency Model
- Organizational Alignment
- Crucial Conversations for School Leaders
- The Influencer Model
- High Impact School Leader Activities Framework

Research for Better Teaching (Observing and analyzing teaching by JimWarnock)
Strategic Teaching and Evaluation of Progress (STEP) Assessment
STEP Data Management System
Columbia's Teachers College Reading & Writing Workshop
Message Time Plus
Children's Literacy Initiative: Blueprint for Early Literacy Curriculum training
McGraw-Hill: My Math Curriculum training
Phonological Awareness Literacy Screening (PALS)
Comprehension from the Ground up (a Heinemann Publishing Workshop by Sharon Taberski)
The Center for Transformative Teacher Training: No-Nonsense Nurturer Workshop

PUBLICATIONS AND PRESENTATIONS

- "A.I. Tools to Support Mentor Teachers", MNPS Mentor Institute, 2025
- "Project-based Learning: Empowering the Learner for Life", Breads & Threads Magazine, 2021
- "How to Be an Awesome Homeschooler" Summit, Keynote Speaker, 2021
- "Looking Forward to Mixed-Aged Classrooms – A Unique Competitive Advantage", Las Vegas Healthy & Fit Magazine, 2020
- "Home as the Third Teacher", Parents Guide of Las Vegas, 2020
- "Fine Motor Development at Home", Parents Guide of Las Vegas, 2020
- "Writing on Faith", Panel curator for the Las Vegas Book Festival (LVBF), 2019
- "Children's Literature: Shaping Empathic Citizens", Panel curator for LVBF, 2019
- "Reaching Early Readers through STEAM", Panel curator for LVBF, 2019
- "D'Rose Writings: The First Collection", Self-published poet
- "Teaching with Autonomy", Guest blogger for The Century Foundation
- "What Makes the Capital Teaching Residency Unique?", Guest panelist at the KIPP DC Summer Institute, Hot Springs, VA 2013
- "Common Core State Standards for Reading and Math", Guest presenter at the KIPP DC Summer Institute, Hot Springs, VA 2013
- "A Day in the Life of a Capital Teaching Resident", Guest panelist at the Capital Teaching Residency Showcase, Washington, DC 2012

Andrea P. Kinzer

3312 William Bailey Drive • Nashville, Tennessee 37207 • (615) 578-1414 •
apkinzer@gmail.com

Education

Spelman College (Atlanta, Georgia) May 2015
History – US & African American History Concentration
Lipscomb University (Nashville, Tennessee) May 2017
Master of Education in Instructional Practice
Excellence in Research Awardee

Relevant Experience

Teach for America, Director Program Operations September 2025 - Present

- Create the vision and execute on the strategy for administrative support, office culture, office management, event execution and programmatic support.
- Create and implement a regional budget tracking process and be accountable to ensuring compliance with the organization's wide finance expectations.
- Liaise with various national capability departments, such as; Human Assets, Finance, Real Estate, Legal Affairs and more.
- Work with the Executive Director to create and develop all staff meeting structure and design to ensure cross departmental efficiencies and promote collaboration.
- Collaborate with various regional departments (Program, Recruitment, Development and Executive) to develop and manage regional calendar of events and individual departmental budgets.
- Assist statewide communication efforts as needed through social media posts, newsletter distribution and more on a support basis.
- Drives own professional development with support from manager and others to include mandatory PD requirements of the region.
- Engages in community opportunities that have personal meaning/connection
- Understand and effectively communicate Teach For America Nashville Chattanooga's programmatic initiatives, goals, and impact externally and internally.

East End Preparatory School (Nashville,TN) July 2018-May 2024

- Founding 8th grade History Teacher
- Practiced data driven instruction based on data from assessment analytics
- Prepared, internalized, and delivered rigorous, standards-aligned created from scratch lessons
- Used scholar work and assessment data to inform instruction and target intervention
- Engaged in coaching meetings to deepen content expertise and develop instructional mastery
- Served as a teacher/coach for the 5th grade history teacher that included leading professional development sessions, providing feedback and evaluating performances based on an aligned rubric
- Created a positive, supportive classroom culture that promotes joy, self-discipline
- Designed and implemented cross-curricular, project-based learning units of study
- Differentiated instruction to support all students in the learning process

- Instructional Coach
- Awarding Winning Girls Basketball Coach – Charter League Champions 2022-2023, 2023-2024

Riverside Nashville - Impact the City Ministry, Director (Nashville, TN) July 2020-Present

- Created, operated and oversaw a weekly Food Pantry, Community Garden, and Homeless Ministries
- Led a team in serving an average of 100-105 people per week (Fall 2023)
- Organized and trained volunteers to follow pantry protocol and service
- Analyzed pantry trends which resulted in an increase of guests in less than a year
- Produced and shared reports with our church that explained pantry operations trends, and success
- Created and sponsored holiday celebrations that supported our local school - Haynes Middle in collaboration with United4Hope
- Organized consistent service opportunities for members of Riverside Nashville
- Awarded the Umoja Award for community service and engagement by *Kwanzaa Nashville* (2021)
- Executive Produce a Telly Award Winning Documentary, *So Others Might Eat*

Haynes-Trinity Neighborhood Coalition, President August 2022 - Present

- Create, share, and lead in the execution of the vision of the year
- Manage and execute the executive board meetings
- Host bi-monthly community meetings with community partners as a method of keeping our community informed and engaged with policies and practices that impact our neighborhoods
- Inherited the hosting and participation of 'Taste of the District' a fundraiser led by our previous president that raised over $100,000 for our Whites Creek Cluster Schools
- Advocates as a liaison with community partners who are interested in development in our area to ensure our neighbors, students, and schools benefit from their construction and presence in our community

KIPP Nashville College Prep (Nashville, TN) July 2015-June 2019

- Founding lead 7th grade Science teacher.
- Founding lead 7th and 8th Grade History and Science teacher.
- Constructed and edited the scope and sequence and quizzes/unit assessments for the 7th and 8th grade History curriculum.
- Work collaboratively with the lead History teacher at our sister KIPP Nashville middle school by creating lesson plans and assessments that students at both campuses received.
- Coached Girls' Basketball for two years.

Teach for America – Corps Member (Nashville, TN) Summer 2015-2017

- Selected from approximately 57,000 applicants nationwide to join the national teacher corps of recent college graduates who commit two years to teach in under-resourced public schools.
- Participated in an intensive training program to develop the skills and knowledge needed to achieve significant gains in student achievement.

- Taught in a summer school program run by TFA for students in Pearl Cohn High School under the supervision of a faculty of experienced teachers.
- Engaged in a full schedule of professional development activities, including seminars, discussion groups, workshops, individual and group reflections, readings, and 'learning teams' specific to my teaching license area.

Fulton County District Attorney's Office (Atlanta, Georgia) May 2015-August 2015

- Conducted research for the Community Prosecution Unit comprised of 8 different Assistant District Attorneys
- Co-organized and co-operated the Junior DA program sponsored by the District Attorney's Office
- Analyzed, filed, and compiled data in preparation for court proceedings for various attorneys

VIVA PRICE

NONPROFIT MANAGEMENT EXECUTIVE

CONTACT

+423-605-4130
priceviva@gmail.com
818 Gwynn Drive
Nashville, TN 37216

PROFILE SUMMARY

Enterprising, industrious professional with a passion for strengthening the health of marginalized communities through partnership, strategic planning, community outreach, and resource development. Dedicated social justice advocate with 15 years of nonprofit leadership experience leading research-driven initiatives with fervence, empathy, integrity, and an unmatched work ethic.

EDUCATION

2002-2006

UNIVERSITY OF TN KNOXVILLE

- Bachelor of Arts
- Psycholgy & Sociology Majors
- summa cum laude

SKILLS

- Leadership
- Effective Communication
- Team Building
- Project Management
- Program Development, Maintenance & Evaluation
- Quality Improvement Projects
- Resource Development
- Public Relations
- Critical Thinking
- Collective Impact
- Systems Change
- Fiscal Governance

WORK EXPERIENCE

Executive Director
Youth Encouragement Services, Inc.
Nashville, TN
2018 - PRESENT

- Led the successful acquisition of two nonprofit organizations and merger of Boards
- Developed and implemented a live strategic plan with Board and management team
- Instituted the first agency logic model to track program impact through outcome and evaluation metrics
- Doubled the Board membership to engage 20 professionals and increased diversity by 20%
- Established the Little Builders Early Learning Center microsite from inception through execution
- Led a one year $500k capital campaign for facility improvements resulting in 60% in-kind donations
- Effectively managed a team of 15 employees, 8 consultants, 200+ volunteers, and 3k supporters
- Launched a career mentoring initiative matching 40+ students
- Administered resource development, projections, and management of 4 budgets
- Led the expansion of agency revenue from $500,000 to $1.2 million over four years.

DIRECTOR OF INJURY PREVENTION, ADOLESCENT HEALTH & YOUTH DEVELOPMENT
Cobb & Douglas Public Health
Marietta, GA
2014-2017
2012-2014

- Directed district injury prevention programs for two counties, supervising 3 department staff, 7 contracted staff, and 50+ volunteers; oversees the implementation of over 160 local Safe Kids events, annually reaching over 15k residents; led a 25% increase in program deliverables in 3 fiscal cycles with a 15% increase in grant funding.
- Worked with a board of 18 executive level professionals to facilitate coalition building of over 40 partnering agencies and fundraising of over $75k in 6 months.
- Conducted data analysis and strategic outreach efforts to at-risk communities; completed annual community needs assessment of emerging data trends and developed, implemented, and evaluated a rolling three-year strategic injury prevention plan for the agency.
- Developed and monitored 6 program budgets totaling over $250,000.
- Received the 2017 NACCHO Model Practice Award for leading the decreasing risky behaviors in youth through the Power in Truth Conference annual training, engaging over 30 local agencies and equipping over 500 youth to develop leadership skills and make informed decisions.

VIVA PRICE

NONPROFIT MANAGEMENT EXECUTIVE

COMMUNITY INVOLVEMENT

- Nashville Early Education Coalition Advisory Board (2023-2025)
- Center for Nonprofit Excellence, Board of Directors (2023-2025); Programming Committee Chair (2025-Present); Collective Impact Learning Community (2021-2022); Inaugural CEO Cohort (2018-2019)
- The Gate School Board of Directors (2025)
- The Village Nashville Founding Member Organization (2023-2025)
- Raising Readers Nashville Action Teams Member (2023-Present)
- Blueprint for Early Childhood Success Steering Committee (2021-2023)
- Vanderbilt University, Community Engagement Forum (2021-2022)
- MOSAIC Changemakers Fellow (2021)
- Cobb County Child Fatality Review Board (2014-2017)
- Communities in Schools of Marietta/Cobb County Advisory Board (2012-2017)
- National Association of County & City Health Officials, Model Practice Award Recipient (2016)
- GA Department of Family & Children's Services Foster Care Review Board (2010-2013)

WORK EXPERIENCE (CONTINUED)

COMMUNITY PARTNERSHIPS FOR PROTECTING CHILDREN, COORDINATOR — Marietta, GA
GA Division of Family & Children Services — 2010-2012

- Supervised 4 metro Atlanta implementation teams with over 50 community volunteers on the development of family-centered, strength-focused, and community-based child abuse prevention and intervention strategies; established relationships with stakeholders, and led community outreach and engagement efforts for the department.
- Compiled and presented county maltreatment reports to agency Administration, Board, and community organizations; identified leading trends; evaluated family barriers to accessing resources, and collaborated with stakeholders to address gaps in services; advised department staff and introduced policy changes to ensure effective execution of the model.
- Cultivated evidence-based, community programs in target catchment areas and organized neighborhood networks of support.

CARE COORDINATOR
HUMAN SERVICES COORDINATOR C — Boston, MA
MA Department of Public Health — 2008-2010

- Directed the local medical home initiative to promote systems change among regional and community health centers, advising a team of 10 health system clinicians.
- Coordinated services of children and youth with special healthcare needs (CYSHCN), assisting families gain access to medical/community benefits, programs, and services; provided technical assistance and linkage to medical service providers, case managers, educators, and parents
- Monitored educational and housing system compliance with federal regulations and administered requests for financial support funds.
- Led Greater Boston interagency collaboration meetings and provided consultation on complex cases; organized, developed, and managed annual regional conferences for over 80 stakeholders of CYSHCN.

THERAPEUTIC FOSTER CARE SPECIALIST — Knoxville, TN
Helen Ross McNabb Center — 2007-2008

- Provided intensive case management services to youth in foster care, achieving permanency for over 75% of clients
- Advised foster and biological parents on behavioral intervention strategies, and develop plans to address target behaviors
- Completed client needs assessment and quarterly treatment plans; presented case documentation and professional recommendations of daily progress notes, monthly summaries, serious incidents, and court reports to map client progress.

JOHN WEBB
111 17th Ave S Nashville, TN 37203
214-448-5737 | john.webb@pnfp.com

EDUCATION

VANDERBILT UNIVERSITY – OWEN GRADUATE SCHOOL OF MANAGEMENT **Nashville, TN**
Master of Science in Finance, May 2019
- Training the Street: Corporate Valuation and Financial Modeling
- Relevant Courses: Investment Management, Financial Reporting, Corporate Valuation

VANDERBILT UNIVERSITY **Nashville, TN**
Major: Economics; Minor: Corporate Strategy, May 2018
- GPA: 3.62; Dean's List
- Vanderbilt Vice Chancellor's Scholar-Athlete Award, 2015, 2016
- Relevant Coursework: Corporate Finance, Fundamentals of Management, Corporate Strategy

ST. MARK'S SCHOOL OF TEXAS **Dallas, TX**
- GPA: 4.3/4.0; High Honors
- Washington and Lee Book Award, Special Recognition, 2014

EXPERIENCE

PINNACLE FINANCIAL PARTNERS/RAYMOND JAMES– (Private Wealth Management) **Nashville, TN**
July 2019 – *Private Wealth Advisor*
- Provide full suite of wealth management solutions for high and ultra-high net-worth families and individuals
- Create and manage custom-built portfolios, ensuring appropriate asset allocation for the ~$850m in AUM
- Lead alternative investment research and strategies, serving as an expert for Pinnacle and Raymond James

GOLDMAN SACHS (Investment Management Division – SPAC Team) **New York, NY**
May - August 2018 *Lead Analyst*
- Performed company and industry due diligence for all target acquisitions, leading to the addition of over 600 qualified companies to the target outreach list.
- Designed and instituted the company database to organize all incoming deal flow, which continues to serve as the source of all data
- Provided company analyses and created decks that were presented to all members weekly

TREVALE CAPITAL PARTNERS (Private Equity) **Dallas, TX**
May – July 2017 *Summer Analyst*
- Assisted with deal overviews and compiling target acquisition financial data to present to the investment team, participating in the investment strategies and fund focus discussions to determine investment criteria
- Analyzed the Confidential Investment Memorandums and performed both company and industry analysis to determine if companies were worth pursuing further
- Lead the team assigned to research the primary target to determine its growth potential, ultimately deciding the value created through strategic cuts was not worth the risk due to other market factors

LENNOX CAPITAL (Hedge Fund) **Dallas, TX**
July 2016 *Summer Analyst*
- Fundamentally researched and analyzed companies based on historic ratios and potential future cash flows to compare intrinsic value to market value and identify potential catalysts or triggers
- Conducted preliminary due diligence for target investments, while making investment suggestions that eventually led to a return of over 27%

ADDITIONAL

Small Group Founder
- Founded and help lead a weekly Bible Study for young professionals in the Nashville community

Nashville Young Professionals
- Create events for young professionals to network and learn from each other

Key Skills
- Microsoft Excel, Word, PowerPoint, Accounting (Basic), Market Research, Investment Analysis

Cate Elcan Fair

Nashville, TN · (615) 445-9644 · cateelcan@gmail.com

EDUCATION

B./M.T. Youth and Social Innovation + Masters in Teaching · *2016 – 2020*
University of Virginia, School of Education and Human Development · Charlottesville, VA

- Graduate specialization: Elementary Education with Gifted Education Endorsement
- Related coursework: Reading Development, Differentiated Reading Instruction, Classroom Management, Child Psychology, Mindfulness and Development

High School Diploma · *Ensworth School* · Nashville, TN *2016*

EXPERIENCE

Substitute Teacher · *The Ensworth School* · Nashville, TN · *Spring – Fall 2025*

- Covered Lower and Middle School classrooms across grade levels and subject areas

English Teacher · *Futuro Verde* · Santa Teresa, Costa Rica · *Jan – Jul 2024*

- Designed and delivered differentiated English language lessons for English Language Learners (ELL)
- Monitored and assessed student progress using formative and summative strategies
- Collaborated with classroom teachers to provide scaffolding and targeted support

4th Grade Teacher. · *Randolph Elementary School (Title I)* · Arlington, VA · *Fall 2021 – Summer 2023*

- Lead classroom teacher and ELA team lead for 4th grade
- Served students from diverse backgrounds including Special Ed, Gifted & Talented, and ELL populations

Reading Specialist (Long-Term Substitute) · *Randolph Elementary School* · Arlington, VA · *Spring 2021*

- Planned, taught, and assessed structured literacy small groups
- Organized and built IB Portfolios

Student Teacher · *Randolph Elementary School* · Arlington, VA · *Fall 2020*

- Co-taught 2nd grade; planned and implemented whole-group and small-group lessons virtually

Literacy Intervention Coach · *Mary McLeod Bethune Day Public Charter School* · Washington, DC · *Summer 2019*

- Delivered targeted literacy intervention for K–3 students in small groups
- Developed and taught structured small-group lesson plans

Reading Tutor · *Stone Robinson Elementary School (via UVA)* · Charlottesville, VA · *Fall 2018 – Spring 2019*

- Provided one-on-one tutoring; created weekly reading lesson plans and practiced fluency

Mentor / "Big Sister" · *Young Women's Leadership Program, UVA* · Charlottesville, VA · *Fall 2017 – Spring 2018*

- Mentored a 7th grade student through a UVA-based community leadership program

Director & Founder · *Exits Summer Program* · Nashville, TN · *2015 – 2016*

- Founded a children's summer program focused on early childhood literacy
- Hired and managed staff, communicated with parents, organized field trips and curriculum

SKILLS & CERTIFICATIONS

Responsive Classroom Educator · Structured Literacy Instruction · Differentiated Instruction · IEP & Gifted Education Support · Classroom Management · Curriculum Design · ELL Instruction · Leadership & Collaboration

Steven "Holt" Madden

1009 South St · Nashville, TN 37203 · (832)-405-2112 ·
HoltMadden@gmail.com

PROFESSIONAL EXPERIENCE

Boyle Investment Company **Nashville, TN**
Senior Associate June 2018 - Present

- Sole associate directly supporting the four managing partners responsible for leasing, managing, and developing roughly 3.5 Million SFof commercial space in Nashville
- Appointed to internal business committee with senior partner in order to analyze internal financial performance, monitor the competitive landscape, study capital market dynamics, and create a portfolio wide strategic plan
- Developed and leveraged a wide variety of proprietary financial models to support asset management and to inform development/ investment decisions
  - Relevant Projects: hold vs. sale analysis, interest carry forecasts, feasibility analysis, early loan payoff analysis, IRR/NPV/DCF analysis, capital schedules, development budgets/models, cashflow models, amortization schedules, portfolio reports, lease analysis, net effectiverent analysis, break-even occupancy models, loan capacity projection analysis
- Responsible for standardizing and professionalizing recurring multi-family, office,and retail market reports for partners, owners, and investors
- Appointed to be team lead on multiple asset dispositions equating to over $200 Million in transaction value
- Managed marketing department to create multiple strategic plans to ultimately drive leasing and awareness at office projects
- Fielded, negotiated, and closed over 65 office leasing transactions equating to more than $25 million in gross rental revenue
- Analyzed prospective tenant financial statements to determine credit worthiness and recommend securitization of leases
- Designed, assessed, and managed a wide variety of concurrent capital improvement scopes while ensuring alignment of landlord expectations, architect deliverables, tenant preferences, and contractor execution
- Liaised between development team and lenders in managing periodic development draw package deliverables and schedules
- Participated in weekly OAC development meetings in order to produce and send monthly development reports to investors
- Responsible for researching, analyzing, and synthesizing a series of 'white-papers' to educate our partners and investors on a variety of topics that drove the ownership decision making process including complex tenant lease provisions, loan provisions, land encumbrances, municipal requirements, zoning ordinances, opportunity zones, congressional tax bills, and congressional stimulus bills

Management Intern Fall 2017

- Developed a detailed operating budget (Kardin Budget System) using existing financial reports (Yardi) in order to perform reforecasts,calculate operating expense recoveries and perform year-end expense reconciliations

Prophet **Atlanta, GA**
Summer Consulting Associate Summer 2017

- Mapped a multi-product customer journey that identified key decision nodes to inform opportunities for targeted segment-level messaging
- Transformed segmentation analyses into cohesive and digestible customer profiles that were utilized in the messaging architecture

Premier Asset Management **Chicago, IL**
Summer Analyst Summer 2016

- Researched and assessed water commodity markets in order to identify attractive investment opportunities based on technological competitiveadvantages and presented findings to senior level management
- Completed a mentorship program with upper-level management regarding asset management and financial markets

LICENSES & RELEVANT PROFESSIONAL DEVELOPMENT

State of Tennessee Licensed Real Estate Affiliate Broker May 2018 – Present
Certified Commercial Investment Member (CCIM) - Candidate August 2020 - Present

- Completed two of four core requisites to achieve CCIM designation: CI101 – Financial Analysis CRE Investment, CI102 - Market Analysis, CI103 – User Decision Analysis, and CRE Negotiations Course

Argus Training November 2018

- Completed 2-day training session through *Vanderbilt Owen Graduate School of Management*

Real Estate Financial Modeling (REFM) June 2019

- Attended 3-day tailored private training session with Bruce Kirsch, author of nationally adopted *Real Estate Finance and Investments* textbook

EDUCATION

VANDERBILT UNIVERSITY **Nashville, TN**
B.S. Human & Organizational Development (Minor: Corporate Strategy) August 2013 - May 2018
GPA: 3.70/4.00, Six-Time Dean's List Selection
Student Involvement: Director of Recruitment (Sigma Alpha Epsilon), Director of Partnerships for Vanderbilt Dance Marathon, Chairman for Best Buddies Spread the Word Campaign, 4-time appointed Student Development Liaison by Vice Chancellor John S. Beasley

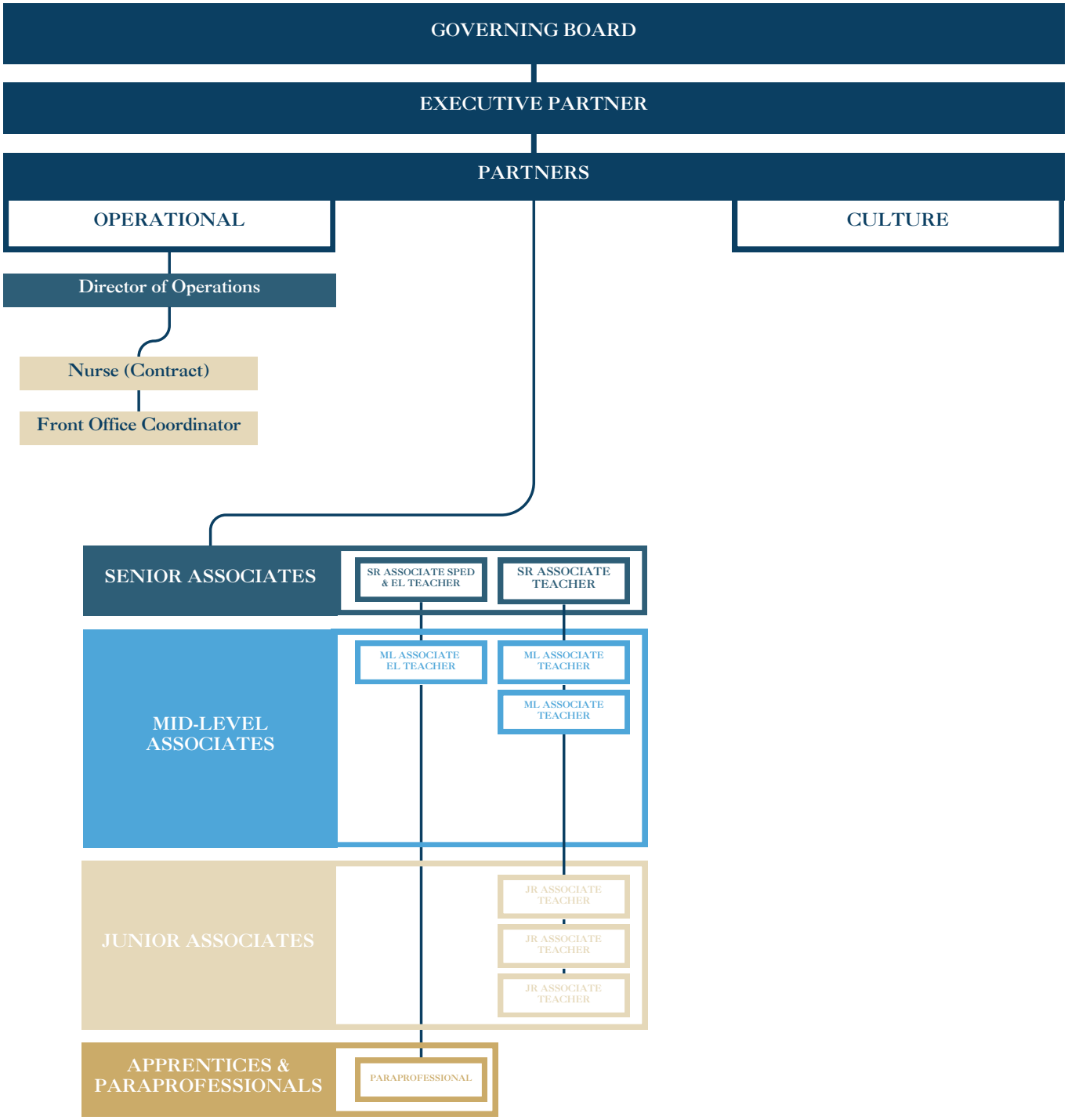
OTHER INFORMATION

Membership: NAIOP Developing Leader (Junior Board Member), ULI Member (Urban Land Institute), United Way (Junior Board Member)
Relevant Proficiencies: Microsoft Office, Argus, Yardi, VTS, CoStar, MetroStudy, SitesUSA, CRS Database, SiteToDoBusiness
Interests: Drone pilot, bible study, hunting, golf, and health/fitness. Three-year varsity golf team member; three time top ten player of the year
Int. Travel: China, South Africa, England, Ireland, Italy, France, Spain, Switzerland, Greece, Argentina, Belize, Mexico, Canada, and New Zealand

Attachment 4: Organization Chart

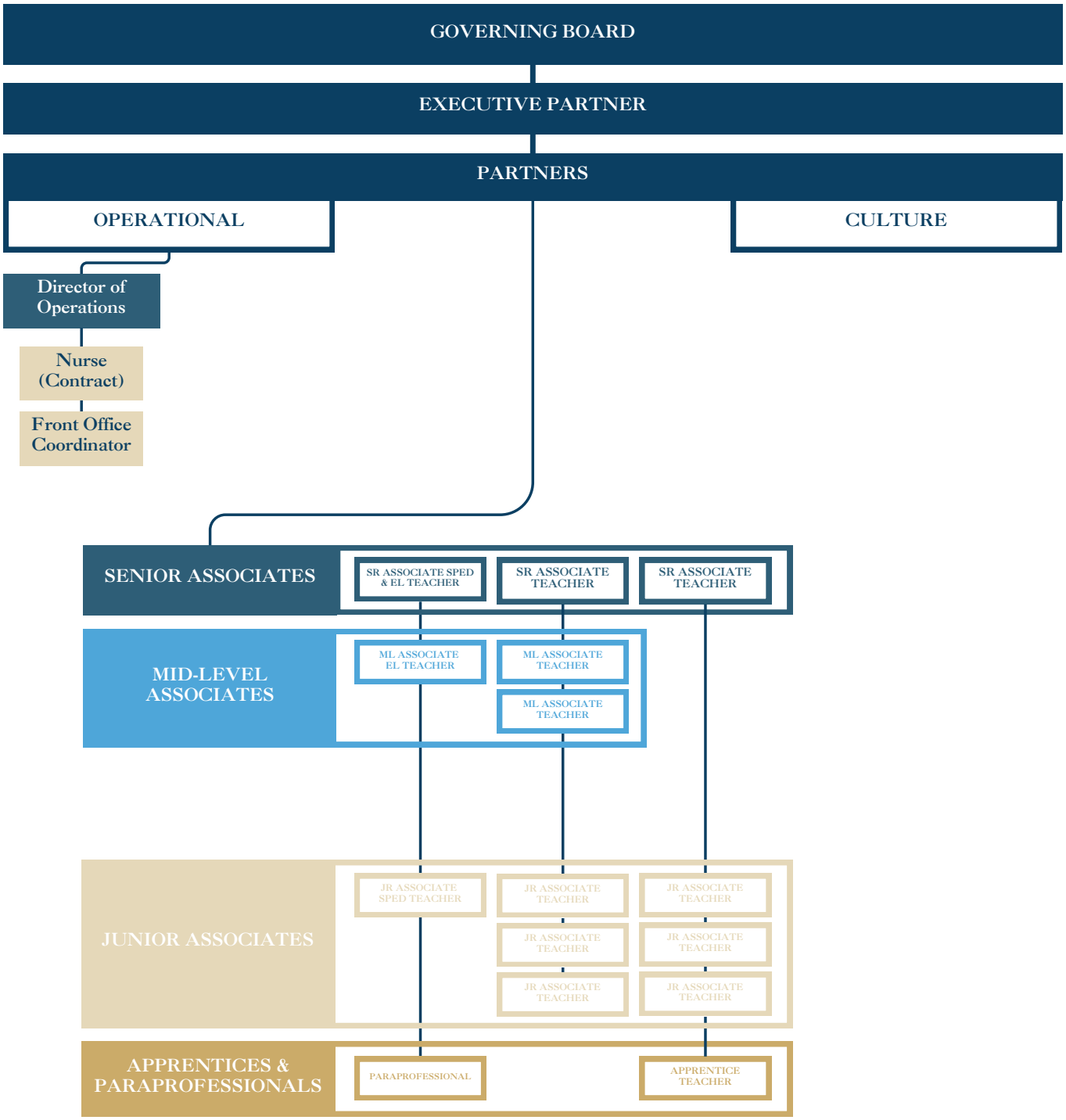
THE GATE SCHOOL

ORGANIZATION CHART YEAR 1



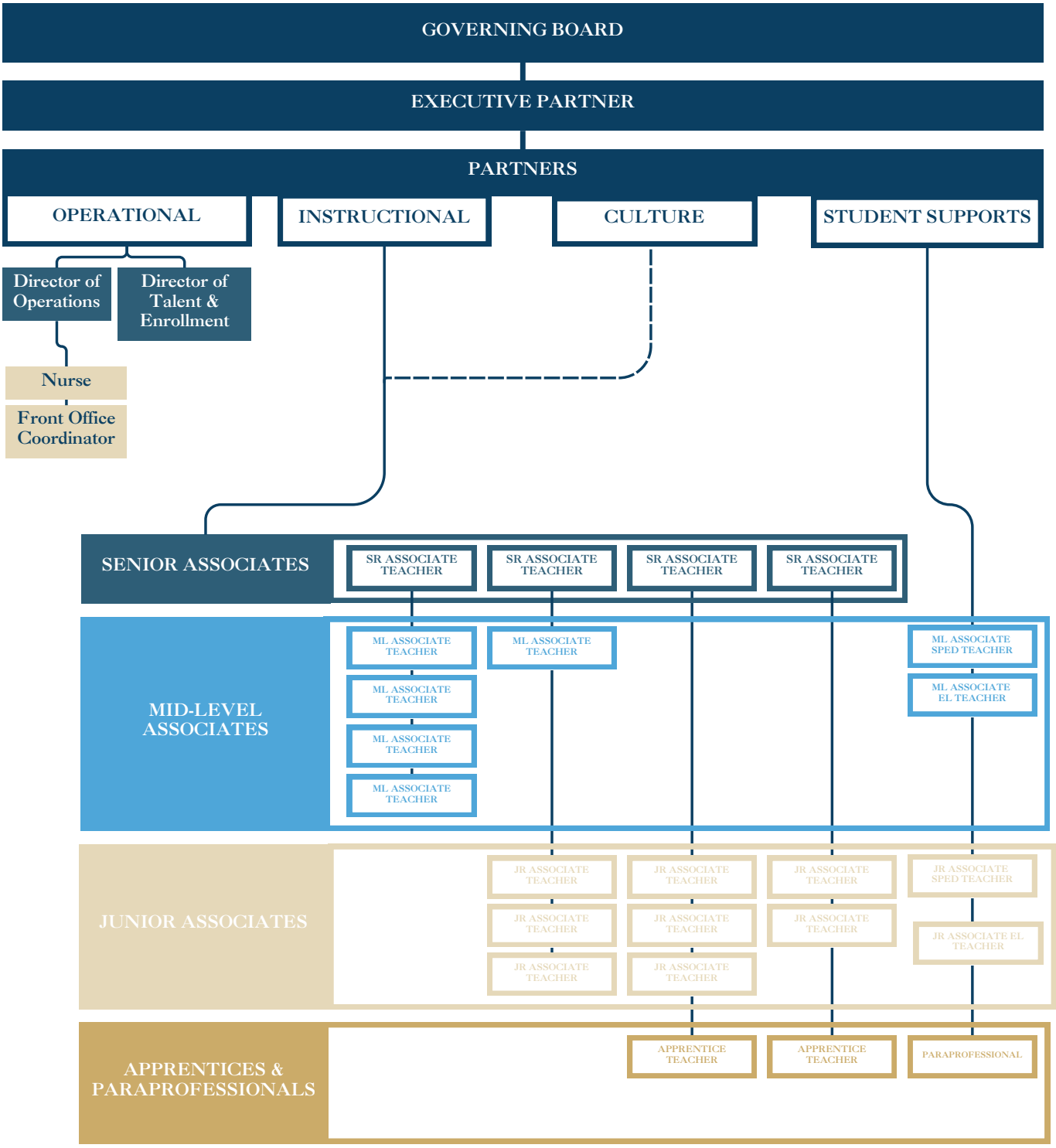
ORGANIZATION CHART
YEAR 2

THE GATE SCHOOL



THE GATE SCHOOL

ORGANIZATION CHART YEAR 3



Attachment 5: Articles of Incorporation

AMENDED AND RESTATED

CHARTER

OF

THE GATE SCHOOL

The undersigned, having capacity to contract and acting as the incorporator of the nonprofit corporation under the Tennessee Nonprofit Corporation Act ("Act"), as amended, hereby adopts this Amended and Restated Charter for the Corporation, amending and restating in full the Charter of the Corporation filed with the Tennessee Secretary of State on July 18, 2025:

1. The name of the Corporation is **The Gate School** (the "Corporation").

2. The Corporation is a public benefit corporation.

3. The Corporation is not a religious corporation.

4. The name, county and street address of the Corporation's initial registered agent and office are:

The Gate School
816 Gwynn Dr.
Nashville, Davidson County, Tennessee 37216

5. The name and address of incorporator of the Corporation is:

Andrea P. Perry, Esq.
Spencer Fane LLP
511 Union Street, Suite 1000
Nashville, Tennessee 37219

6. The street address, county and email address of the principal office of the Corporation is:

816 Gwynn Dr.
Nashville, Davidson County, Tennessee 37216
burrus@nashvilleincubator.org

7. The Corporation is not for profit.

8. The Corporation shall not have members.

9. No part of the net earnings of the Corporation shall inure to the benefit of or be distributed to its directors, officers, or other private individuals, except that the Corporation shall

be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article 9 hereof.

10. The mission of the Corporation is to shepherd the curiosity and confidence of students in order to unlock their potential during the critical middle school years and to prepare them to lead their own lives of purpose and possibility.

11. The purpose or purposes for which the Corporation is organized are exclusively charitable, religious, educational and scientific within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (or any successor provision to such section) (the "Code").

12. The Corporation shall neither have nor exercise any power, nor shall it engage directly or indirectly in any activity, that would invalidate its status (1) as a Corporation which is exempt from Federal income taxation as an organization described in Section 501(c)(3) of the Code, or (2) as a Corporation to which contributions are deductible under Sections 170, 2055 and 2522 of the Code.

13. No substantial part of the activities of the Corporation shall consist of attempts to influence legislation by propaganda or otherwise; nor shall it in any manner or to any extent participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office, nor shall the Corporation engage in any activities that are unlawful under applicable Federal, state, or local laws.

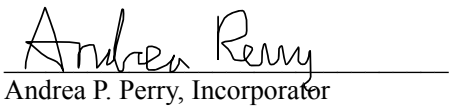
14. Upon termination, dissolution or winding up of the Corporation, the Board of Directors shall, after paying or making provisions for the payment of all liabilities of the Corporation, dispose of all corporate assets by distributing such assets to one or more organizations that are organized and operated exclusively for charitable purposes and at that time qualify as exempt organizations under Section 501(c)(3) of the Code or its successor provision. If possible, the purposes of such charitable donee or donees should be substantially similar to the charitable purposes of the Corporation. Any such assets not so disposed of by the Board of Directors shall be disposed of a court of competent jurisdiction in the County in which the principal office of the Corporation is then located, to such organization or organizations organized and operated exclusively for charitable, educational or scientific purposes as shall, at that time, qualify as tax-exempt under Section 501(c)(3) of the Code or its successor provision. If possible, the court shall cause such remaining assets to be transferred to a donee or donees that have purposes aimed at developing and mentoring young people.

15. A director of the Corporation shall not be liable to the Corporation for monetary damages for breach of fiduciary duty as a director; provided, however, that this provision does not eliminate or limit the liability of a director (i) for any breach of the director's duty of loyalty to the Corporation; (ii) for acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law; or (iii) for a distribution that is unlawful. If Tennessee law is amended or modified to authorize corporate action eliminating or further limiting the personal liability of directors, then the liability of a director of the Corporation shall

thereupon be eliminated or limited, without the necessity of further amendment of this Charter, to the fullest extent permitted by Tennessee law. Any repeal or modification of the provisions of this Article 15 shall not adversely affect any right of protection of a director of the Corporation existing at the time of such repeal or modification.

16. Any other provision of these Articles to the contrary notwithstanding, the Corporation shall, if the following provisions of law are applicable to it: (i) not engage in any act of self dealing as defined in Section 4941 of the Code; (ii) distribute its income for each fiscal year at such time and in such manner as not to be subject to the tax under Section 4942 of the Code; (iii) not retain any excess business holdings as defined in Section 4943 of the Code; (iv) not make any investments in such manner as to subject the Corporation to tax under Section 4944 of the Code; and (v) not make any taxable expenditures as defined in Section 4945 of the Code.

Dated August 18, 2025.



Andrea P. Perry, Incorporator

Division of Business and Charitable Organizations
Department of State
State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2286
sos.tn.gov/

Tre Hargett
Secretary of State

THOMAS BURRUS COX
816 GWYNN DRIVE
NASHVILLE, TN 37216, USA

07/21/2025

Filing Acknowledgment

Please review the filing information below and notify our office immediately of any discrepencies.

Entity Name:	THE GATE SCHOOL		
SOS Control #:	002036456	Initial Filing Date:	07/18/2025
Entity Type:	Nonprofit Corporation	Formation Locale:	TENNESSEE
Status:	Active	Duration Term:	Perpetual
Fiscal Year Close:	June	Annual Report Due:	10/01/2026
Business County:	Davidson	Additional Designation:	School Organization - Exempt
Benefit Type:	Public Benefit Corporation	Religious Type:	Non-Religious

Document Receipt

Receipt #:	(No Receipt Record)	Filing Fee:	$0.00
Payment:	(No Payment Record)		$0.00

Registered Agent Address:
THE GATE SCHOOL
816 Gwynn Dr
Nashville, TN 37216

Principal Office Address:
816 Gwynn Dr
Nashville, TN 37216
Davidson County, USA

Congratulations on the successful filing of your Charter Nonprofit Corporation for **THE GATE SCHOOL** in the State of Tennessee which is effective **07/18/2025**. You must also file this document in the office of the Register of Deeds in the county where the entity has its principal office if such principal office is in Tennessee. Please visit the Tennessee Department of Revenue website (www.tn.gov/revenue) to determine your online tax registration requirements. If you need to obtain a Certificate of Existence for this entity, you can request, pay for, and receive it from our website.

You must file an Annual Report with this office on or before the Annual Report Due Date noted above and maintain a Registered Office and Registered Agent. Failure to do so will subject the business to Administrative Dissolution/Revocation.

Tre Hargett
Secretary of State

Tracking Number
B2025496851

Charter Nonprofit Corporation

Division of Business and Charitable Organizations
Department of State
State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2286
sos.tn.gov/businesses

Control #: 002036456
Filed: 07/18/2025 01:21 PM
Tre Hargett
Secretary of State

Tre Hargett
Secretary of State

Entity Information

Entity Name: THE GATE SCHOOL

Entity Type: Nonprofit Corporation

Fiscal Year Ending Month: June

Additional Designation: School Organization - Exempt

☑ I certify that pursuant to T.C.A. §49-2-611, this nonprofit corporation is exempt from the $100 filing fee required by §48-51-303(a)(1)

This corportation is: ☑ an educational institution as defined in T.C.A §48-101-502(b)

Principal Office Address
816 Gwynn Dr
Nashville, TN 37216
Davidson County, USA

Mailing Address
816 Gwynn Dr
Nashville, TN 37216
Davidson County, USA

Will this filing have a delayed effective date?
☐ Yes ☑ No

Period of Duration:
Perpetual

Nature of Business (NAICS):
611110 - Elementary and Secondary Schools

This corporation is a:
☑ Public Benefit Corporation ☐ Mutual Benefit Corporation
☐ Religous Corporation ☑ Not Religous Corporation

This corporation will:
☐ Have Members ☑ Not Have Members

Provisions regarding the distribution of assets upon dissolution:

Upon the dissolution of the corporation, all assets remaining after payment of or provision for all debts and liabilities of the corporation shall be distributed exclusively for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, such as educational purposes. Any such assets not so disposed of shall be distributed to the federal government, or to a state or local government, for a public purpose. If any assets remain that cannot be distributed in accordance with the above, the disposition shall be determined by a court of competent jurisdiction in the county in which the principal office of the corporation is then located, exclusively for such purposes.

Other Provisions:

(No other provisions)

Do you have additional uploads you would like to attach to this filing?
☐ Yes ☑ No

Incorporators

THOMAS COX
816 Gwynn Dr
Nashville, TN 37216, USA

Registered Agent Information

THE GATE SCHOOL
816 Gwynn Dr
Nashville, TN 37216, USA

Incorporator's Signature

☑ By entering my name in the space provided below, I certify that I am authorized to file this document on behalf of this entity, have examined the document and, to the best of my knowledge and belief, it is true, correct and complete as of this day.

☑ The undersigned, acting as incorporator of the nonprofit corporation under the provisions of the Tennessee Nonprofit Corporation Act, adopt the above Articles of Incorporation.

Signed Electronically: THOMAS BURRUS COX **Date:** 07/18/2025

Docusign Envelope ID: 17957EBE-F -459C-9569-2E44E92E6A5E

WRITTEN CONSENT OF THE BOARD OF TRUSTEES
OF
THE GATE SCHOOL
(IN LIEU OF A MEETING)

Pursuant to the Tennessee Nonprofit Corporation Act and the Bylaws of The Gate School, a Tennessee nonprofit corporation (the "Corporation"), the undersigned, constituting all of the members of the Board of Trustees (the "Board"), hereby consent in writing, without a meeting, to the adoption of the following resolutions, effective as of the date last written below.

RECITALS:

A. The Board has determined that it is in the best interests of the Corporation to amend and restate the Bylaws of the Corporation to, among other things, incorporate a nondiscrimination policy applicable to schools as required by the Internal Revenue Service in connection with the Corporation's application for recognition of exemption under Section 501(c)(3) of the Internal Revenue Code.

B. The Board has reviewed the proposed Amended and Restated Bylaws of The Gate School (the "Bylaws").

AGREEMENT:

NOW, THEREFORE, BE IT RESOLVED, that the Bylaws be, and hereby are, approved and adopted in their entirety, effective as of the date of adoption, and that such Bylaws shall amend, restate, and supersede all prior bylaws of the Corporation.

RESOLVED FURTHER, that the officers of the Corporation are authorized and directed to execute, deliver, and submit such documents and to take such further actions as may be necessary or advisable to carry out the intent of the foregoing resolutions, including submission of the Bylaws to the Internal Revenue Service.

CERTIFICATION

The undersigned, being the duly elected and acting Secretary of the Corporation, hereby certifies that the foregoing Written Consent was adopted by the Board of Trustees of The Gate School in accordance with applicable law and the Corporation's Bylaws, and that such resolutions remain in full force and effect as of the date set forth below.

SECRETARY:

DocuSigned by:
Viva Price
493FAC423072478...

Date: January 17, 2026

{02185702.1 }

Attachment 6: Proof of Nonprofit and Tax-Exempt Status

Division of Business and Charitable Organizations
Department of State
State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2286
sos.tn.gov/

Tre Hargett
Secretary of State

THOMAS BURRUS COX
816 GWYNN DRIVE
NASHVILLE, TN 37216, USA

07/21/2025

Filing Acknowledgment

Please review the filing information below and notify our office immediately of any discrepencies.

Entity Name:	THE GATE SCHOOL		
SOS Control #:	002036456	Initial Filing Date:	07/18/2025
Entity Type:	Nonprofit Corporation	Formation Locale:	TENNESSEE
Status:	Active	Duration Term:	Perpetual
Fiscal Year Close:	June	Annual Report Due:	10/01/2026
Business County:	Davidson	Additional Designation:	School Organization - Exempt
Benefit Type:	Public Benefit Corporation	Religious Type:	Non-Religious

Document Receipt

Receipt #:	(No Receipt Record)	Filing Fee:	$0.00
Payment:	(No Payment Record)		$0.00

Registered Agent Address:
THE GATE SCHOOL
816 Gwynn Dr
Nashville, TN 37216

Principal Office Address:
816 Gwynn Dr
Nashville, TN 37216
Davidson County, USA

Congratulations on the successful filing of your Charter Nonprofit Corporation for **THE GATE SCHOOL** in the State of Tennessee which is effective **07/18/2025**. You must also file this document in the office of the Register of Deeds in the county where the entity has its principal office if such principal office is in Tennessee. Please visit the Tennessee Department of Revenue website (www.tn.gov/revenue) to determine your online tax registration requirements. If you need to obtain a Certificate of Existence for this entity, you can request, pay for, and receive it from our website.

You must file an Annual Report with this office on or before the Annual Report Due Date noted above and maintain a Registered Office and Registered Agent. Failure to do so will subject the business to Administrative Dissolution/Revocation.

Tre Hargett
Secretary of State

Tracking Number
B2025496851

Charter Nonprofit Corporation

Division of Business and Charitable Organizations
Department of State
State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2286
sos.tn.gov/businesses

Control #: 002036456
Filed: 07/18/2025 01:21 PM
Tre Hargett
Secretary of State

Tre Hargett
Secretary of State

Entity Information

Entity Name: THE GATE SCHOOL

Entity Type: Nonprofit Corporation

Fiscal Year Ending Month: June

Additional Designation: School Organization - Exempt

☑ I certify that pursuant to T.C.A. §49-2-611, this nonprofit corporation is exempt from the $100 filing fee required by §48-51-303(a)(1)

This corportation is: ☑ an educational institution as defined in T.C.A §48-101-502(b)

Principal Office Address
816 Gwynn Dr
Nashville, TN 37216
Davidson County, USA

Mailing Address
816 Gwynn Dr
Nashville, TN 37216
Davidson County, USA

Will this filing have a delayed effective date?
☐ Yes ☑ No

Period of Duration:
Perpetual

Nature of Business (NAICS):
611110 - Elementary and Secondary Schools

This corporation is a:
☑ Public Benefit Corporation ☐ Mutual Benefit Corporation
☐ Religous Corporation ☑ Not Religous Corporation

This corporation will:
☐ Have Members ☑ Not Have Members

Provisions regarding the distribution of assets upon dissolution:

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Other Provisions:

(No other provisions)

Do you have additional uploads you would like to attach to this filing?
☐ Yes ☑ No

Incorporators

THOMAS COX
816 Gwynn Dr
Nashville, TN 37216, USA

Registered Agent Information

THE GATE SCHOOL
816 Gwynn Dr
Nashville, TN 37216, USA

Incorporator's Signature

☑ By entering my name in the space provided below, I certify that I am authorized to file this document on behalf of this entity, have examined the document and, to the best of my knowledge and belief, it is true, correct and complete as of this day.

☑ The undersigned, acting as incorporator of the nonprofit corporation under the provisions of the Tennessee Nonprofit Corporation Act, adopt the above Articles of Incorporation.

Signed Electronically: THOMAS BURRUS COX **Date:** 07/18/2025

DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
CINCINNATI OH 45999-0023

Date of this notice: 07-18-2025

Employer Identification Number:
39-3288207

Form: SS-4

Number of this notice: CP 575 E

GATE SCHOOL
816 GWYNN DR
NASHVILLE, TN 37216

For assistance you may call us at:
1-800-829-4933

IF YOU WRITE, ATTACH THE
STUB AT THE END OF THIS NOTICE.

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 39-3288207. This EIN will identify your entity, accounts, tax returns, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

Taxpayers request an EIN for business and tax purposes. Some taxpayers receive CP575 notices when another person has stolen their identity and are operating using their information. If you did **not** apply for this EIN, please contact us at the phone number or address listed on the top of this notice.

When filing tax documents, making payments, or replying to any related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

When you submitted your application for an EIN, you checked the box indicating you are a non-profit organization. Assigning an EIN does not grant tax-exempt status to non-profit organizations. Publication 557, Tax-Exempt Status for Your organization, has details on the application process, as well as information on returns you may need to file. To apply for recognition of tax-exempt status, organizations must complete an application on one of the following forms: Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code; Form 1023-EZ, Streamlined Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code; Form 1024, Application for Recognition Under Section 501(a); or Form 1024-A, Application for Recognition of Exemption Under Section 501(c)(4) of the Internal Revenue Code.

Nearly all organizations claiming tax-exempt status must file a Form 990-series annual information return (Form 990, 990-EZ, or 990-PF) or notice (Form 990-N) beginning with the year they legally form, even if they have not yet applied for or received recognition of tax-exempt status.

If you become tax-exempt, you will lose tax-exempt status if you fail to file a required return or notice for three consecutive years, unless a filing exception applies to you (search www.irs.gov for Annual Exempt Organization Return: Who Must File). We start calculating this three-year period from the tax year we assigned the EIN to you. If that first tax year isn't a full twelve months, you're still responsible for submitting a return for that year. If you didn't legally form in the same tax year in which you obtained your EIN, contact us at the phone number or address listed at the top of this letter. For the most current information on your filing requirements and other important information, visit www.irs.gov/charities.

(IRS USE ONLY) 575E 07-18-2025 GATE O 9999999999 SS-4

IMPORTANT REMINDERS:

* Keep a copy of this notice in your permanent records. This notice is issued only one time and the IRS will not be able to generate a duplicate copy for you. You may give a copy of this document to anyone asking for proof of your EIN.

* Use this EIN and your name exactly as they appear at the top of this notice on all your federal tax forms.

* Refer to this EIN on your tax-related correspondence and documents.

* Provide future officers of your organization with a copy of this notice.

Your name control associated with this EIN is GATE. You will need to provide this information along with your EIN, if you file your returns electronically.

Safeguard your EIN by referring to Publication 4557, Safeguarding Taxpayer Data: A Guide for Your Business.

You can get any of the forms or publications mentioned in this letter by visiting our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions about your EIN, you can contact us at the phone number or address listed at the top of this notice. If you write, please tear off the stub at the bottom of this notice and include it with your letter.

Thank you for your cooperation.

Keep this part for your records. CP 575 E (Rev. 7-2007)

Return this part with any correspondence so we may identify your account. Please correct any errors in your name or address.

CP 575 E

9999999999

Your Telephone Number Best Time to Call
( ) -
_____ _____

DATE OF THIS NOTICE: 07-18-2025
EMPLOYER IDENTIFICATION NUMBER: 39-3288207
FORM: SS-4 NOBOD

INTERNAL REVENUE SERVICE
CINCINNATI OH 45999-0023

GATE SCHOOL
816 GWYNN DR
NASHVILLE, TN 37216

STATE OF TENNESSEE
DEPARTMENT OF REVENUE

Exemption Authorization

October 13, 2025

THE GATE SCHOOL
816 GWYNN DR
NASHVILLE TN 37216-1717

Letter ID: L2056880576
Account ID: 1002711687-SLC
Account Type: Sales and Use Tax

RE: Sales and Use Tax Exempt Organizations or Institutions Certificate of Exemption

The Tennessee Department of Revenue has issued this exemption certificate in accordance with Tenn. Code Ann. § 67-6-322 or § 56-25-504 for the educational, religious, historical, or charitable non-profit organization or institution named on the enclosed certificate. This organization or institution qualifies for the authority to make sales and use tax exempt purchases of goods and services that it will use, consume or give away. This authorization for exemption does not extend to sales tax that the organization must collect or pay on its regular sales of goods or taxable services.

This authorization for exemption is limited to sales made directly to the referenced organization. This exemption certificate may not be used for sales made to individuals paying with personal checks or personal debit or credit cards, even if the individual is a representative or employee of the organization, and he or she will be reimbursed for the purchase. Sellers must refuse to accept the certificate when the sale is made to someone other than the organization.

This exemption certificate may not be used to make purchases without the payment of sales and use tax for other locations and may not be transferred to or used by any other person.

The taxpayer must furnish its supplier(s) at the time of purchase with a **COPY** of the enclosed certificate with the lower portion properly completed. The original certificate should be retained **for copy purposes.** The supplier must maintain a file copy as evidence of the sales tax exemption.

David Gerregano

David Gerregano
Commissioner of Revenue

Taxpayer Services Division • 500 Deaderick Street • Nashville, TN 37242
Tel 615-253-0600 • www.tn.gov/revenue

aL0043

STATE OF TENNESSEE
DEPARTMENT OF REVENUE

THE GATE SCHOOL
816 GWYNN DR
NASHVILLE TN 37216-1717

Effective Date: October 13, 2025
Expiration Date: June 30, 2027
Account No: 1002711687-SLC
Exemption No: *878676736*
Facility Address:
THE GATE SCHOOL
816 GWYNN DR
NASHVILLE TN 37216-1717

Exempt Organizations or Institutions
Sales and Use Tax Certificate of Exemption

This organization or institution qualifies for the authority to make sales and use tax exempt purchases of goods and services that it will use, consume or give away.

This authorization for exemption is limited to sales made directly to the referenced organization. This exemption certificate may not be used for sales made to individuals paying with personal checks or personal debit or credit cards, even if the individual is a representative or employee of the organization, and he or she will be reimbursed for the purchase. Sellers must refuse to accept the certificate when the sale is made to someone other than the organization.

This exemption certificate may not be used to make purchases without the payment of sales and use tax for other locations and may not be transferred to or used by any other person.

Ensure this lower portion is properly completed and signed before presenting to a vendor.

Seller's Name *Seller's Address (City & State)*

I,_____, as an authorized representative of the taxpayer named above, affirm that the purchases qualify for the exemption and will be used at the location of the facility address referenced above. Under penalty of perjury, I affirm this to be a true and correct statement.

Print Name of Authorized Representative *Signature of Authorized Representative* *Date*

The supplier must maintain a copy of this document as evidence of the sales tax exemption.

Form **1023**
(Rev. January 2020)
Department of the Treasury
Internal Revenue Service

Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code

Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form1023 for instructions and the latest information.

OMB No. 1545-0047

Note: *If exempt status is approved, this application will be open for public inspection.*

Use the "?" buttons throughout this form for help in completing this application. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500.

If you cannot complete required responses within the textbox limits throughout this form, upload your additional narratives with the other required documents.

Part I Identification of Applicant

1a Full Name of Organization (exactly as it appears in your organizing document) THE GATE SCHOOL			**b** Care of Name (if applicable) THOMAS BURRUS COX
c Mailing Address (Number, street and room/suite) 816 GWYNN DR	**d** City NASHVILLE		**e** Country United States
f State Tennessee	**g** Zip Code + 4 37216	**h** Foreign Province (or State)	**i** Foreign Postal Code
2 Employer Identification Number 39-3288207	**3** Month Tax Year Ends JUNE	**4** Person to Contact if More Information is Needed (officer, director, trustee, or authorized representative) ANDREA PERRY	
5 Contact Telephone Number 615-238-6303	**6** Fax Number (optional)		**7** User Fee Submitted $600.00

8 Organization's Website (if available): thegateschool.org

9 List the names, titles, and mailing addresses of your officers, directors, and/or trustees.

Submitted (1) **Saved (2)**

Sort by: Date

Application for Recognition of Exemption Under Section 501(c)(3)

Organizations file this form to apply for recognition of exemption from federal income tax under Section 501(c)(3)

Form Number: 1023
Form Status: Accepted
Pay.gov Tracking ID: 27QUOE69
Date Submitted: 09/26/2025 16:38:25 PM
Application Name: Form 1023

Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

THE GATE SCHOOL
C/O THOMAS BURRUS COX
816 GWYNN DR
NASHVILLE, TN 37216

Date:
01/23/2026
Employer ID number:
39-3288207
Person to contact:
Name: Matthew Obalo
ID number: 5094975
Telephone: 877-829-5500
Accounting period ending:
June 30
Public charity status:
170(b)(1)(A)(ii)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
July 18, 2025
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053672010045

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Letter 947 (Rev. 2-2020)
Catalog Number 35152P

Attachment 7: Governing Board Bylaws

AMENDED AND RESTATED BYLAWS OF THE GATE SCHOOL

THESE AMENDED AND RESTATED BYLAWS ("Bylaws") **OF THE GATE SCHOOL**, a Tennessee nonprofit corporation (the "Corporation") are hereby adopted this 17th day of January, 2026 (the "Effective Date") by the Board of Directors (the "Board" or ("Directors") in accordance with the Tennessee Nonprofit Corporation Act as codified in TENN. CODE ANN. § 48-51-101, et. seq. (the "*Act*") and the Corporation's Charter filed and effective as of September 20, 2012.

ARTICLE I
NAME AND OFFICES

Section 1. *Name*. The name of the organization shall be The Gate School, a Tennessee nonprofit corporation formed pursuant to the Act (as defined herein below) ("*TGS*").

Section 2. *Principal Office*. The principal office of TGS shall be located in Nashville, Tennessee, at such place as the Board of Trustees shall determine from time to time.

Section 3. *Other Offices*. TGS may also have such other offices within or outside the State of Tennessee, as the Board of Trustees may determine or as the affairs of TGS may require.

ARTICLE II
DEFINITIONS

Act. The term "the Act" shall mean Title 48, chapters 51-68 of the Tennessee Code Annotated, also known as the Tennessee Nonprofit Corporation Act, as may be amended from time to time.

Board of Trustees. The terms "Board of Trustees", "Board Members", "Board" and "Trustee(s)" shall mean the Board of Trustees of TGS.

Bylaws. The term "Bylaws" shall mean the Bylaws of TGS except where reference is specifically made to the bylaws of another entity.

Charter. The term "Charter" shall mean the Charter filed with the Tennessee Secretary of State, as may be amended and restated from time to time.

Code. The term "the Code" shall mean the Internal Revenue Code of 1986, as amended.

Executive Committee. The term "Executive Committee" shall mean the Chair, Vice-Chair, if any, Secretary and Treasurer of TGS.

Founding Member. The term "Founding Member" shall mean Andrea Kinzer.

Officers. The terms "Officers" and "Board Officers" shall mean those persons appointed as officers of TGS pursuant to Section 1 of Article VI hereof.

ARTICLE III
PURPOSE, MISSION, POWERS AND RELATED MATTERS

Section 1. *Purpose.* TGS is organized exclusively for educational and charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, as amended. TGS' primary purpose is to operate a public charter school pursuant to Tennessee Code Annotated § 49-13-101 et seq., in accordance with its charter agreement approved by [authorizing entity] and all applicable laws and regulations.

Section 2. *Mission Statement.* The mission of TGS is to shepherd the curiosity and confidence of students in order to unlock their potential during the critical middle school years and to prepare them to lead their own lives of purpose and possibility. No part of the activities of TGS shall be the carrying of propaganda, or otherwise attempting to influence legislation, and TGS shall not participate in, nor intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office except as authorized under the Code.

Section 3. *Powers.* TGS shall have and exercise all rights, powers, and privileges granted to nonprofit corporations under the laws of the State of Tennessee, together with any powers incidental thereto, including but not limited to the power to:

1. Operate one or more public charter schools in accordance with applicable law and the terms of its charter agreement.

2. Employ and contract with staff, including a Head of School, teachers, and administrative personnel, to carry out the educational program.

3. Lease, purchase, and otherwise acquire, hold, use, and dispose of real and personal property in furtherance of TGS' purposes.

4. Apply for, receive, and expend public funds, grants, gifts, and contributions to support TGS' mission.

5. Adopt policies, curricula, and programs consistent with the mission and charter agreement.

6. Enter into contracts and agreements necessary to conduct the affairs of TGS.

7. Take all other actions necessary or convenient to accomplish TGS' purposes, provided such actions are not inconsistent with its nonprofit status, charter agreement, or applicable law.

ARTICLE IV
BOARD OF TRUSTEES AND BOARD OF TRUSTEES MEETINGS

Section 1. *General Powers and Qualifications.* All corporate powers of TGS shall be exercised by and under the authority and direction of its Board of Trustees. The Board shall have supervision, control, and direction over TGS' activities, determine its policies, and ensure TGS' compliance with its charter agreement and applicable law.

Section 2. *Number and Qualifications of Trustees*. The Board shall consist of no fewer than three (3) and no more than thirty (30) Trustees. The specific number of Trustees shall be set and established from time to time by resolution of the Board adopted by the affirmative vote of the majority of the members of the Board then in office; provided, however, that the number of Trustees shall not be less than the number authorized by this Section 2. All Trustees must be natural persons and shall be at least eighteen (18) years of age.

Section 3. *Election of Tenure*. Trustees shall be elected by the Trustees then entitled to vote at each annual meeting of the Board of Trustees. Except as otherwise provided in this Section and these Bylaws, each Trustee shall be elected to serve for a term of three (3) years, or until his or her successor is elected and qualified; provided, however, the Founding Member shall be eligible to serve as a Trustee for the duration of the life of TGS.

Section 4. *Composition*. The Board shall include individuals with experience and expertise in areas such as education, finance, law, governance, and community engagement. Trustees shall be independent and shall not be employees of TGS, except as otherwise permitted by these Bylaws and law.

Section 5. *Duties of the Board*. In addition to the duties imposed by law, the Board shall:

(a) Establish and maintain the mission, vision, and strategic goals of TGS.
(b) Approve policies, budgets, and major contracts.
(c) Ensure fiscal responsibility and compliance with applicable laws and charter requirements.
(d) Recruit, support, and evaluate the Head of School.
(e) Maintain accountability to the authorizer, families, and the community.

Section 6. *Regular Meetings*. Except as otherwise provided herein, regular meetings of the Board of Trustees shall be held at such times and places as the Board of Trustees shall determine from time to time.

Section 7. *Special Meetings*. Special meetings of the Board of Trustees may be called by the Chair or by any two (2) Trustees.

Section 8. *Notice of Meetings.* Except as otherwise provided herein, written or printed notice stating the place, date and hour of a regular meetings shall be delivered not less than two (2) days nor more than fourteen (14) days before the date of the meeting, unless otherwise required or allowed by the Act, either personally, by mail, telegram or facsimile or e-mail, by or at the direction of those entitled to call a meeting as provided herein. If mailed, such notice shall

be deemed to be delivered when deposited in the United States mail addressed to the Board Member at such Board Member's address as it appears on the records of TGS with postage thereon prepaid. Except as otherwise provided herein, special meetings of the Board of Trustees must be preceded by at least two (2) days' notice to each Trustee of the date, time, place, and purpose of such special meeting.

Section 9. *Waiver of Notice*. If a Trustee attends or participates in a meeting, he or she waives any required notice to him or her of the meeting unless the Trustee at the beginning of the meeting (or promptly upon arrival) objects to holding the meeting or transacting business at the meeting and does not thereafter vote for or assent to action taken at the meeting.

Section 10. *Quorum and Voting*. A quorum of the Board of Trustees consists of a majority (but no fewer than two (2)) of the Trustees then in office before a meeting begins. If a quorum is present when a vote is taken, the affirmative vote of a majority of the Trustees present is the act of the Board of Trustees, unless these Bylaws, the Charter or the Act require the vote of a greater number of Trustees.

Section 11. *Vacancy*. If a vacancy occurs on the Board of Trustees, including a vacancy resulting from an increase in the number of Trustees, or a vacancy resulting from the resignation or the removal of a Trustee with or without cause:

(a) The Board of Trustees may fill the vacancy; or

(b) If the Trustees remaining in office constitute fewer than a quorum of the Board, they may fill the vacancy by the affirmative vote of a majority of all the Trustees remaining in office.

Provided, however, that any vacancy filled by the Trustees under this Section shall be consistent with the qualifications to serve as a Board of Trustee referenced in Section 1 of this Article.

Section 12. *Removal of Trustees*. A majority of the Trustees may vote to remove any one (1) or more Trustees, with or without cause, at any special meeting that is specifically called for that purpose, and notice of such purpose is provided to the Trustees; provided however, the Founding Members may only be removed by (a) death; or (b) a determination by a certified doctor of medicine and/or psychology that such Founding Member is mentally or physically unable to continue in such role.

Section 13. *Action Without Meeting*. Action that is required or permitted to be taken at a meeting of the Board of Trustees may be taken without such a meeting if all Trustees consent to taking such action without a meeting. If all Trustees so consent, the affirmative vote of the number of Trustees that would be necessary to authorize or take such action at a meeting shall be the act of the Board, except as otherwise provided in these Bylaws. Such consent(s) shall describe the action taken, be in writing, be signed by each Trustee entitled to vote, indicate each signing Trustee's vote or abstention on the action, and be delivered to the Secretary of TGS and included in the minutes filed with the corporate records.

Section 14. *Electronic Attendance of Meetings*. Participation by members of the Board or any committee designated by the Board in any meeting of the Board or committee shall be permitted by teleconference, videoconference or other communications equipment by means of which all persons participating in the meeting can hear each other. Participation in such a meeting pursuant to this Section 12 shall constitute presence in person at such meeting.

Section 15. *Action by Electronic Mail*. Any action that must or may be taken in writing pursuant to these Bylaws may be taken through electronic mail or similar text-based communication technology provided communications are sent in a format that can be stored or printed by TGS.

Section 16. *Member Approval*. The Board may direct that a matter be submitted to the members of the Board for vote by mail or electronic mail. In such event binding action of the Board shall be by majority vote of the votes received in accordance with the rules fixed by the Board.

Section 17. *Self-Dealing*. No member of the Board of Trustees shall use confidential information for personal gain or to the detriment of TGS. Any Trustee who abuses confidential information shall be removed from the Board. The Board of Trustees will follow procedures as laid out in the Bylaws for such removal.

TGS will not engage in any act of self-dealing, as defined in Section 4941(d) of the Code, or corresponding provisions of any later federal tax laws; nor retain any excess business holdings, as defined in Section 4943(c) of the Code, or corresponding provisions of any later federal tax laws; nor make any investments in a manner that would incur tax liability under Section 4944 of the Code, or corresponding provisions of any later federal tax laws; nor make any taxable expenditures, as defined in Section 4945(d) of the Code, or corresponding provisions of any later federal tax laws. In order to fully effectuate the provision of this Section, TGS shall adopt such procedures, and shall otherwise adhere to such administrative requirements as may from time to time be necessary, in order to fully comply with all applicable federal tax laws and regulations.

Section 18. *Compensation of Trustees*. Trustees shall not be compensated for serving on the Board, but TGS may reimburse Trustees for documented reasonable expenses incurred in the performance of their duties to TGS. In addition, Trustees who also serve as employees of TGS may be compensated for their service as employees.

Section 19. *Open Meetings Compliance*. All meetings of the Board shall comply with applicable state open meetings and public records laws.

ARTICLE V
OFFICERS

Section 1. *Election*. The Board will prepare a slate of nominations for Officers and the Board shall elect a Chair, Vice Chair, Secretary, Treasurer and such other Officers who shall be Board Members, as deemed necessary. The Officers will be elected annually with a term limit of three (3) consecutive years; provided, however, there shall be no term limitation for any office

held by the Founding Member. The Chair automatically will serve as Immediate Past Chair upon the expiration of his or her term in the office of Chair without the necessity of a formal vote by the Board.

Section 2. *Resignation or Removal of Board Officers*. A Board Officer may resign their position as an Officer, or as a Board Member, at any time by giving written notice to the Chair. Such resignation is effective upon delivery or as directed in writing. An Officer may be removed from office with or without cause by the affirmative vote of a majority of the Trustees entitled to vote at any Board meeting; provided, however, the Founding Members may only be removed by (a) death; or (b) a determination by a certified doctor of medicine or psychology that such Founding Member is mentally or physically unable to continue in such role. This Officer removal process does not automatically remove the former Officer from membership on the Board, although that may occur at the discretion of the Board Members pursuant to Article IV, Section 10 of these Bylaws. The remaining Board Members may fill any Officer vacancy by appointing another person to serve the remaining portion of the former Officer's term.

Section 3. *Powers and Duties.* Each Officer has the authority and shall perform the duties as set forth below, or the duties prescribed by the Board of Trustees.

(a) The Chair of the Board shall:

i. Shall preside over all Board Meetings.

ii. Set meeting agendas in consultation with the Head of School and other officers.

iii. Direct the activities of TGS and assign to other Officers and committee chairpersons such duties as may be deemed necessary.

iv. Appoint chairpersons to committees.

v. Sign all official contracts and other necessary documents which have been approved by the Board of Trustees.

vi. Perform such other duties as pertains to said office as assigned or requested by the Board of Trustees.

(b) The Vice Chair shall

i. Preside over the Board meetings in the absence of the Chair.

ii. Assist the Chair in all of his or her tasks.

iii. Perform such other duties as may be assigned or requested by the Chair or Board of Trustees.

(c) Secretary shall:

i. Maintain records of all proceedings of TGS and the Board of Trustees.

ii. Provide notice of meetings when such notice is required.

iii. Perform such other duties as may be assigned or requested by the Chair or Board of Trustees.

(d) The Treasurer shall:

i. Serve as the chief financial officer of TGS.

ii. Oversee the financial affairs of TGS.

iii. Understand financial accounting for non-profit organizations.

iv. Provide financial reports to the Board.

v. Assist in preparing the annual budget and presenting the budget for Board approval.

vi. Review the annual audit.

vii. Collect any dues, assessments or other monies required under these Bylaws and pay the expenses of TGS.

viii. Perform such other duties as may be assigned or requested by the Chair or Board of Trustees.

(e) The immediate past Chair shall be an ex-officio position for a one (1) year term to assist the new Chair with the duties required under Article V, Section 3(a) of these Bylaws. The immediate Past Chair will meet with the Executive Committee but shall have no authority or power to act on behalf of the Executive Committee or as a Trustee; provided, however the immediate Past Chair will be entitled to vote at any Board meeting.

Section 4. *Vacancies*. The order of succession for vacancies in the Officers of the Board shall be as follows:

(a) Should a vacancy occur in the office of the Chair, occasioned by death, resignation, removal or disability, the order of succession shall be: Vice Chair, then Secretary.

(b) Should a vacancy occur in the office of the Treasurer or Secretary, the Board of Trustees shall elect from its current Board Members a successor to such office.

Section 5. *Delegation of Authority.* In case of the absence of any Officer of TGS or for any other reason that the Board of Trustees may deem sufficient, the Board of Trustees may delegate, from time to time, any or all of the powers or duties of such Officer to any other Officer or to any Trustee.

ARTICLE VI
OFFICERS OF TGS

Section 1. *Head of School.*

(a) Role. TGS may employ a Head of School. All terms of employment shall be determined by the Chair, subject to Board Approval. The Head of School shall serve as the chief executive officer of TGS, and be responsible for the day-to-day administration and management of all programs, operations, and personnel in accordance with policies and budgets approved by the Board. The Head of School shall report to the Board and may be a part-time or full-time employee or independent contractor.

(b) Ex Officio, Non-Voting Status. The Head of School shall serve as an ex officio, non-voting member of the Board. The Head of School shall be entitled to receive notice of all meetings, to attend and participate in discussions, and to make reports to the Board, but shall not have the right to vote on any matter.

(c) Conflict of Interest. The Head of School shall recuse themselves from any discussion or deliberation regarding their own employment, performance evaluation, compensation, or any matter presenting a conflict of interest.

(d) Evaluation. The Board shall conduct an annual performance review of the Head of School in accordance with Board policy.

Section 2. *Other Employees*. Other employees of TGS may be hired as deemed appropriate by the Board. Unless otherwise directed by the Board, all employees shall report to the Head of School. The hiring and termination of employees shall be the responsibility of the Board. The Board may, however, designate such responsibility either generally or with respect to a specific employment position to the Chair, a Board Committee, or the Executive Trustee.

ARTICLE VII
COMMITTEES

Section 1. *Executive Committee*. The Executive Committee shall consist of the Officers of the Board of Trustees and the Head of School, if any.

Section 2. *Other Committees.* The Board may, by resolution adopted by a majority of the Trustees then in office, establish standing or special committees to carry out the work of the Board. Each committee shall consist of at least two (2) Trustees, and the Chair shall appoint committee members and designate a committee chair, subject to Board approval.

Section 3. *Standing Committees*. The Board may establish standing committees, which may include but are not limited to:

(a) Finance Committee – Oversees TGS' financial health, budget, and audits.

(b) Academic Excellence Committee – Monitors student performance, curriculum quality, and compliance with academic goals.

(c) Governance Committee – Oversees Board recruitment, training, and evaluation.

(d) Development Committee – Supports fundraising and community engagement efforts.

Section 4. *Committee Authority*. Committees shall have only the authority expressly delegated to them by the Board and shall not have authority to act in place of the Board except as permitted by law and expressly authorized in a Board resolution.

Section 5. *Committee Members.* The committee chairpersons shall appoint members to each committee.

Section 7. *Committee Reports*. All committees shall make such reports as may be required of them to the Chair and Board of Trustees.

Section 7. *Ad Hoc.* The Executive Committee shall determine the need for ad hoc committee(s) to address specific areas of interest to TGS, the nature of which is anticipated to be brief (less than one year) in duration.

ARTICLE VIII
EXECUTION OF DOCUMENTS

Section 1. *Execution of Documents*. The Board of Trustees may, by a proper resolution, provide for the method of signing checks, notes, drafts, bills of exchange or other instruments for the payment of money; for the transfer and sale of property; for the assumption of liabilities; for the voting of stock held in other corporations; and for the execution of all other legal documents.

Section 2. *Facsimile or Electronic Signatures.* For purposes of written consents of the Board of Trustees, TGS accepts and agrees to be bound to documents executed and transmitted by facsimile and/or electronic mail provided each such facsimile or electronic mail document is received within the time period specified for such document.

ARTICLE IX
OPERATIONS

Section 1. *Bank Accounts.* All funds of TGS not otherwise employed, shall be deposited to the credit of TGS in a general or special account in such banks, trust companies, or other depositories as the Board of Trustees may select, or may be selected by an Officer, Officers, agent, or agents of TGS to whom such power has been delegated by the Board of Trustees. Such Officer, Officers, agent, or agents to whom such power may be delegated by the Board of Trustees, may endorse, assign, and deliver any check, draft, wiring instructions or other order for the payment of moneys which are payable to the order of TGS.

Section 2. *Books and Records.* TGS shall keep, or cause to be kept, full, complete and accurate books of account showing the assets, liabilities, costs, expenditures, receipts and other

such similar matters. Such books of account will be the property of TGS and will be prepared in accordance with generally accepted accounting principles and procedures. Such books of account shall be maintained at TGS's principal office, or such other place as the Trustees may determine. In addition, all books and records of TGS may be inspected by any Trustee for any purpose at any reasonable time on written demand.

Section 3. *Financial Statements.* Within one hundred twenty (120) days following the end of each fiscal year of TGS, the Treasurer shall cause to be prepared financial statements of TGS for such fiscal year in accordance with generally accepted accounting principals (GAAP).

Section 4. *Financial Controls*. The Board shall ensure that proper financial controls are in place, including but not limited to:

(a) Board approval of the annual budget and any material budget amendments.

(b) Segregation of financial duties to the extent practicable.

(c) Regular financial reporting to the Board.

(d) Annual independent audit or review, as required by law.

Section 5. *Check Signing.* The Board of Trustees shall establish a written policy regarding the required signatories for all checks, drafts and wiring instructions withdrawing funds from any depositories at its initial meeting. Such policy shall include naming the Trustees of TGS who may sign on behalf of TGS and any dollar limitations for such signatories. Such policy may be revised from time to time by the Board of Trustees.

Section 6. *Public Accountability*. All financial records of TGS shall be maintained in accordance with applicable law and made available for public inspection to the extent required by law.

ARTICLE X
INDEMNIFICATION AND INSURANCE

Section 1. *Mandatory Indemnification of Trustees, Officers, Employees and Agents.* To the maximum extent permitted by the Act, TGS shall indemnify and advance reasonable expenses to any person who is or was a Trustee, Officer, employee or agent of TGS, or to such person's heirs, executors, administrators and legal representatives, for the defense of any threatened, pending, or completed action, suit or proceeding, whether civil, criminal, administrative, or investigative, and whether formal or informal (any such action, suit or proceeding being hereinafter referred to as the "*Proceeding*"), to which such person was, is or is threatened to be made, a named defendant or respondent, which indemnification and advancement of expenses shall include reasonable attorneys' 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 Trustee, Officer, employee or agent of TGS; and

(b) A Trustee, Officer, employee or agent conducted himself or herself in good faith (and not willful, wanton or gross negligence), and he or she reasonably believed (i) in the case of conduct in his or her official capacity with TGS, 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 TGS; and (iii) in the case of any criminal proceeding, that he or she had no reasonable cause to believe his or her conduct was unlawful. The termination of a proceeding by judgment, order, settlement, conviction, or upon a plea of *nolo contendere* or its equivalent is not, of itself, determinative that the Trustee, Officer, employee or agent did not meet the standard of conduct herein described.

Section 2. *Non-Exclusive Application.* The rights to indemnification and advancement of expenses set forth in Section 1 of this Article X above are contractual between TGS and the person being indemnified, and his or her heirs, executors, administrators and legal representatives, and are not exclusive of other similar rights of indemnification or advancement of expenses to which such person may be entitled, whether by contract, by law, by the Charter, by a resolution of the Board of Trustees, by these Bylaws, by the purchase and maintenance by TGS of insurance on behalf of an Officer, Trustee, employee or agent of TGS, or by an agreement with TGS providing for such indemnification, all of which means of indemnification and advancement of expenses are hereby specifically authorized and shall be in addition to any and all rights to which any Trustee, Officer, employee or agent of TGS might otherwise be entitled and provisions hereof shall neither impair nor adversely affect such rights.

Section 3. *Non-Limiting Application.* The provisions of this Article shall not limit the power of TGS to pay or reimburse expenses incurred by a Trustee, Officer, employee or agent of TGS in connection with such person's appearing as a witness in a Proceeding at a time when he or she has not been made a named defendant or respondent to the Proceeding.

Section 4. *Prohibited Indemnification.* Notwithstanding any other provision of this Article, TGS shall not indemnify or advance expenses to or on behalf of any Trustee, Officer, employee or agent of TGS, or such persons heirs, executors, administrators or legal representatives:

(a) If a judgment or other final adjudication adverse to such person establishes his or her liability for any breach of the duty of loyalty to TGS, 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;

(b) In connection with a Proceeding by or in the right of TGS in which such person was adjudged liable to TGS; or

(c) In connection with any other Proceeding charging improper personal benefit to such person, whether or not involving action in his or her official capacity, in which he or she was adjudged liable on the basis that personal benefit was improperly received by him or her.

Section 5. *Repeal or Modification Not Retroactive*. No repeal or modification of the provisions of this Article, either directly or by the adoption of a provision inconsistent with the

provisions of this Article, shall adversely affect any right or protection, as set forth herein, existing in favor of a particular individual at the time of such repeal or modification.

Section 6. *Insurance.* TGS may maintain insurance, at its expense, to protect itself and any Trustee, Officer, employee or agent of TGS or another corporation, partnership, limited liability company, joint venture, trust or other enterprise against any liability asserted against or incurred by the individual in that capacity or arising from the individual's status as a Trustee, Officer, employee or agent, whether or not TGS would have the power to indemnify such person against such expense, liability or loss under the Sections 48-58-502 or 48-58-503 of the Act.

ARTICLE XI
NOTICES

Each Board Member and Officer shall furnish TGS with his or her official address and the mailing of any notice to such address shall be deemed service of such notice or notices upon them as of the date of mailing of same.

ARTICLE XII
CODE OF ETHICS

Section 1. *Board Ethics*. It is imperative to the success of TGS that there be a fully informed, responsive, and reasonable Executive Committee and Board of Trustees. To this end, each Board Member shall conduct themselves at all times in the best interest of TGS. In this regard, each Board Member shall abide by the following "Code of Ethics". No code or set of rules can be framed which will particularize all of the duties of a Board Member. The following code of ethics is to be considered a general guide, yet the enumeration of particular duties should not be construed as a denial of the existence of other equally imperative duties, though not specifically mentioned.

Section 2. *Attendance.* Board Members shall put forth their best effort to attend all meetings and constructively participate in those meetings.

Section 3. *Business Judgment*. Board Members shall exercise good judgment in the control and use of confidential information that may from time to time come into their possession.

Section 4. *Public Relations*. Each Board Member shall serve as a public relations agent for TGS and therefore shall work diligently and properly to promote its goals and objectives while keeping abreast of its overall progress.

Section 5. *Conflicts of Interest and Nepotism*. Board Members shall fully disclose at a meeting of the Board any and all family and/or financial relationships in regard to any matter which is recommended to the Board or upon which the Board must vote. Board Members with a potential conflict of interest shall not participate in formal Board discussions or vote on any matter involving a conflict of interest. "Any matter" includes, but is not limited to, (a) the purchase or rental of goods; (b) providing direct or indirect financial assistance through investments, grants, loans or loan guarantees; and (c) providing employment to a family member. "Financial relationship" includes, but is not limited to, (a) any direct or indirect financial interest

in a specific sale or transaction, including a commission or fee, or share of the proceeds; (b) the prospect of promotion, a profit, repayment of funds owed the individual by an assisted business; and (c) any other form of financial remuneration. Each Trustee shall annually complete and sign a disclosure statement identifying any relationships, positions, or circumstances that may contribute to a conflict of interest. Trustees must disclose any potential conflict as soon as it arises.

Section 6. *Alleged Violations*. The Executive Committee shall be charged with the responsibility of reviewing any allegations of Board Members violating this code or acting in any way which is detrimental to the success of TGS and make recommendations to the full Board for final action.

ARTICLE XIII
RULES OF PROCEDURE/GENERAL PROVISIONS

Section 1. *Procedure*. Robert's Rules of Order shall govern the procedure at all meetings of TGS where applicable, and not inconsistent with the Bylaws of TGS.

Section 2. *Fiscal Year.* The fiscal year of TGS shall commence the first day of July and end the thirtieth day of June of each year.

Section 3. *No Seal.* TGS shall have no seal.

Section 4. *Dissolution*. In the event of the dissolution of TGS, the assets of TGS shall, after appropriate provision for debt and liabilities of TGS, be distributed in any liquidation proceedings to (i) the local school district, (ii) another public school or public charter school, or (iii) another nonprofit organization organized and operated exclusively for educational purposes and qualified under Section 501(c)(3) of the Internal Revenue Code, as determined by the Board and consistent with applicable law.

Section 5. *Basic Policy*. The following is the basic policy of TGS:

(a) TGS shall be non-commercial, non-sectarian, and non-partisan.

(b) The name of TGS, or the names of any Officers thereof in their official capacities, shall not be used in any connection with a commercial concern or with any partisan interest or for any purpose not appropriately related to promotion of the purposes of TGS.

(c) TGS may cooperate with other organizations and agencies determined by the Board, but persons representing TGS in such matters shall make no commitments that bind TGS.

(d) In the event of dissolution of TGS, a committee shall immediately be appointed by TGS to disburse all funds on hand within thirty (30) days of the dissolution date.

ARTICLE XIV
NONDISCRIMINATION

The Gate School admits students of any race, color, national and ethnic origin to all the rights, privileges, programs, and activities generally made available to students at the school. The Gate School does not discriminate on the basis of race, color, national or ethnic origin in the administration of its educational policies, admissions policies, scholarship and loan programs, athletic programs, or other school-administered programs. This policy shall be administered in accordance with applicable federal and state law and shall be maintained as a permanent policy of the Corporation.

ARTICLE XV
AMENDED AND RESTATED BYLAWS

These Amended and Restated Bylaws of the Corporation are adopted by the Board of Trustees of the Corporation pursuant to the Act and the Corporation's Articles of Incorporation, and shall amend, restate, and supersede in their entirety all prior bylaws of the Corporation. These Amended and Restated Bylaws shall be effective as of the date adopted by the Board of Trustees.

ARTICLE XVI
AMENDMENTS

Section 1. *Authority*. These Bylaws may be adopted or amended at any meeting of the Board of Trustees by a two-thirds (2/3) majority of the voting Trustees present and voting provided that a quorum is present and provided that a copy of the originally proposed amendment shall have been mailed or electronically communicated to each Trustee at least two (2) weeks prior to the meeting at which action is to be taken thereon. Amendments to the amendment distributed with the meeting notice may be proposed and approved by a simple majority of Trustees at the meeting provided that the final amendment voted on by the Trustees addresses the topic and only the topic area(s) of the amendment distributed with the meeting notice. The amendment shall become effective immediately upon passage unless otherwise stipulated within the final, approved amendment.

Section 2. *Consistency with Law and Charter*. No amendment shall be made that would cause TGS to cease to qualify as a nonprofit corporation under the laws of the State of Tennessee or as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, nor shall any amendment be inconsistent with TGS' charter agreement or applicable state law.

Attachment 8: Letter of Insurance Coverage

MARTIN & ZERFOSS

INSURANCE & BONDS SINCE 1978

December 1st, 2025

Director of Charter Schools
2601 Bransford Ave.
Nashville, TN 37204

RE: The Gate School

To whom it concerns:

The Gate School has begun the process of fulfilling the insurance requirements with Indian Harbor Insurance Company as required by the charter agreement. As stated by MNPS guidelines General Liability/Automobile Liability Policy: must be equal to or greater than $5,000,000. This insurance will be primary insurance and the first $1,000,000 dollars will be with a company licensed in Tennessee with an AM Best rating of at least A. The following $4,000,000 layer will be covered under an excess liability policy or an umbrella policy. This policy will name MNPS as an additional insured and will include contractual liability. The automobile coverage will cover all owned, hired and non-owned vehicles in the amount of $1,000,000 with the additional $4,000,000 excess layer.

The Professional Liability policy for the Directors and Officers of The Gate School will be equal to or greater than $5,000,000 and the Teacher Professional Liability cover will be equal or greater than $1,000,000. The Workers Compensation and Employers Liability policy will be equal to or greater than $1,000,000 each accident, $1,000,000 each employee and $1,000,000 policy limit. Property and Boiler insurance policy will be provided if the Charter school purchase or leases the property being occupied. Insurance shall be for the full replacement cost of the property and contents with no coinsurance penalty provision.

Certificates of Insurance in a form satisfactory to the Chartering Authority shall be provided by Indian Harbor Insurance Company to the Chartering Authority prior to the commencement of performance of this Charter Agreement. Throughout the term of this Charter Agreement the sponsor will provide updated Certificates of Insurance forms upon expiration of the current certificates including a 10 day notice of cancellation and additional insured status.

Should you have any questions regarding coverage requirements, please feel free to contact me.

Sincerely,

Taylor R Ragan, CIC, CAWC, CRA
Martin & Zerfoss, Inc.

M&Z | 6730 CHARLOTTE PIKE NASHVILLE, TN 37209 | TEL 615 297-8500 FAX 615 269-7390 TF 888 297-8557 | WWW.MARTINZERFOSS.COM

Attachment 9: Operating Budget Template

SCHOOL INFORMATION

Proposed School Name:	The Gate School
Sponsor Contact Name:	Burrus Cox
Sponsor Contact Email Address:	Burrus@thegateschool.org
Sponsor Contact Phone Number:	615-330-8495
Geographic District*:	Davidson County (Metro-Nashville Public School)
State + Local Per-pupil Funding Amount**:	$15,864

**"Geographic District" means the school district that serves the geographic location in which the proposed charter school will operate.*

***Within 10 business days of receipt of a sponsor's Letter of Intent, authorizers are expected to share with the sponsor the most recent average combined state and local per-pupil funding amount. Sponsors should enter that number in the cell above to inform revenue calculations on subsequent tabs of this workbook.*

YEAR 0 BUDGET SUMMARY													
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	NOTES AND ASSUMPTIONS
Total revenue	$154,880	$0	$0	$0	$0	$932,560	$0	$0	$0	$250,000	$22,560	$325,000	
Total expenditures	$0	$0	$0	$0	$0	$0	$49,702	$44,702	$44,702	$44,702	$116,485	$729,765	
Net operating income	$154,880	$0	$0	$0	$0	$932,560	-$49,702	-$44,702	-$44,702	$205,298	-$93,925	-$404,765	$654,943 net operating income from Yr 0 to be carried over to Yr 1

YEAR 0 REVENUE													
BEGINNING CASH BALANCE	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Cash on hand	$0	$0	$0	$0	$0	$0							
FEDERAL	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
CSP Grant												325000	
Other federal													
OTHER (GRANTS, LOANS, ETC.)	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Private/Individual Donations	$154,880					$22,560					$22,560		$154,880 secured as of 5/15/26, See attachment 1.3
Charter School Growth Fund										$250,000			
New Schools Venture Fund						$250,000							
SCORE Facilities						$250,000							
Other Grants						$410,000							Nashville Funding Collaborative
TOTAL REVENUE	$154,880	$0	$0	$0	$0	$932,560	$0	$0	$0	$250,000	$22,560	$325,000	

YEAR 0 EXPENDITURES													
ADMINISTRATIVE STAFF SALARIES	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Executive Management (CEO, ED)							$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
School Leadership (Principals, Assistant Principals)							$20,000	$20,000	$20,000	$20,000	$20,000	$20,000	
Deans, Directors, and Coordinators													
CFO/Director of Finance													
Operations/Business Manager													
Administrative Staff													
Other Administrative Staff													
Other													
INSTRUCTIONAL STAFF SALARIES	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Teachers - Regular													
Teachers - SPED													
Teachers - EL													
Teaching Assistant													
Specialty Teachers													
Aides													
Therapists and Counselors													
Substitute Teachers													
Librarian													
Other Instructional Staff													
Other													
NON-INSTRUCTIONAL STAFF SALARIES	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Nurse													
Custodian													
Security													
Other Non-Insructional Staff													
Other													
TOTAL SALARIES	$0	$0	$0	$0	$0	$0	$30,000	$30,000	$30,000	$30,000	$30,000	$30,000	
BENEFITS	**MONTH 1**	**MONTH 2**	**MONTH 3**	**MONTH 4**	**MONTH 5**	**MONTH 6**	**MONTH 7**	**MONTH 8**	**MONTH 9**	**MONTH10**	**MONTH 11**	**MONTH 12**	**NOTES AND ASSUMPTIONS**
Social Security	$0	$0	$0	$0	$0	$0	$1,860	$1,860	$1,860	$1,860	$1,860	$1,860	6.20%
Employer Medicare	$0	$0	$0	$0	$0	$0	$435	$435	$435	$435	$435	$435	1.45%
State Unemployment							$95	$95	$95	$95	$95	$95	
Worker's Compensation Insurance							$180	$180	$180	$180	$180	$180	
Health/Medical Insurance							$2,125	$2,125	$2,125	$2,125	$2,125	$2,125	$8,500/yr/staff
Dental Insurance													
Vision Insurance													
Life Insurance													
Pensions/Retirement							$2,436	$2,436	$2,436	$2,436	$2,436	$2,436	TCRS Legacy - 6.36% (1 staff); TCRS Hybrid - 9% (2 staff)
Other													
TOTAL BENEFITS	$0	$0	$0	$0	$0	$0	$7,131	$7,131	$7,131	$7,131	$7,131	$7,131	
CONTRACTED SERVICES	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Accounting/audit							$2,817	$2,817	$2,817	$2,817	$2,817	$2,817	
Legal							$5,000					$5,000	
Management company fee													
Payroll service							$25	$25	$25	$25	$25	$25	
School lunch/food service													
Special education services													
Student support services													
Consultant(s)												$5,000	E-rate and food service consulting
Dues and Memberships												$1,500	
Insert custom contracted service													
TOTAL CONTRACTED SERVICES	$0	$0	$0	$0	$0	$0	$7,842	$2,842	$2,842	$2,842	$2,842	$14,342	
SCHOOL OPERATIONS	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Board expenses													
Classroom / Teaching Supplies and Materials													
Field Trips													
Fundraising Expenses													
Office Expenses							$63	$63	$63	$63	$63	$63	
Other Equipment												$77,800	Yr 1 Staff - 12 x $1000 (laptops); Yr 1 students - 108 x $600 (laptops)
Other Student Services													
Special Education Supplies and Materials													
Staff Development												$3,000	
Staff Recruitment							$417	$417	$417	$417	$417	$417	
Staff Travel													
Student Recruitment / Marketing							$3,833	$3,833	$3,833	$3,833	$3,833	$3,833	
Student Testing and Assessment													
Student Transportation													
Supplies and Other Materials													
Technology												$20,980	
Telephone							$417	$417	$417	$417	$417	$417	
Textbooks / Workbooks													
Insert custom operations expense													
Insert custom operations expense													
Insert custom operations expense													
TOTAL SCHOOL OPERATIONS	$0	$0	$0	$0	$0	$0	$4,729	$4,729	$4,729	$4,729	$4,729	$106,509	
FACILITY OPERATIONS & MAINTENANCE	**JUL**	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**NOTES AND ASSUMPTIONS**
Equipment													
Facilities cost (rent/debt, interest payments, etc.)											$21,416	$521,416	$500K - tenant improvements; 2 months of lease
Furniture											$50,000	$50,000	Yr1 furniture to be spent in Yr 0
Insurance													
Janitorial Services													
Repairs and Maintenance													
Security Services													
Utilities											$367	$367	
Insert custom facilities expense													
Insert custom facilities expense													
Insert custom facilities expense													
TOTAL FACILITY OPS & MAINTENANCE	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$71,783	$571,783	

STUDENT ENROLLMENT SUMMARY MINIMUM					
	Year 1	Year 2	Year 3	Year 4	Year 5
Kindergarten					
1st Grade					
2nd Grade					
3rd Grade					
4th Grade					
5th Grade					
6th Grade	90	90	90	90	90
7th Grade		90	90	90	90
8th Grade			90	90	90
9th Grade					
10th Grade					
11th Grade					
12th Grade					

Total Enrollment	90	180	270	270	270

Change in Net Enrollment	90	90	90	0	0

PERSONNEL COUNTS MINIMUM							
ADMINISTRATIVE STAFF	AVERAGE ANNUAL SALARY	NUMBER OF FTE					NOTES AND ASSUMPTIONS
		Year 1	Year 2	Year 3	Year 4	Year 5	
Executive Management (CEO, ED)	$120,000	1	1	1	1	1	Executive Partner
School Leadership (Principals, Assistant Principals)	$120,000	2	2	3	3	3	Operations Partner (Y1+), Culture Partner (Y1+),
Deans, Directors, and Coordinators	$85,000	1	1	1	1	1	Director of Operations
CFO/Director of Finance							
Operations/Business Manager	$55,000	1	1	1	1	1	Front office Coordinator
Administrative Staff							
Other Administrative Staff							
Insert custom administrative staff							
Insert custom administrative staff							
ADMINISTRATIVE STAFF SALARY TOTALS		**$440,000**	**$440,000**	**$620,000**	**$620,000**	**$620,000**	
INSTRUCTIONAL STAFF	AVERAGE ANNUAL SALARY	NUMBER OF FTE					NOTES AND ASSUMPTIONS
		Year 1	Year 2	Year 3	Year 4	Year 5	
Teachers - Regular							
Teachers - SPED							
Teachers - EL							
Teaching Assistant							
Specialty Teachers							
Aides - Co-Teaching Apprentices/Paras	$40,000	1	1	2	2	2	
Therapists and Counselors							
Substitute Teachers							
Librarian							
Teachers - Senior Associates	$100,000	1	2	3	3	3	See narrative for breakdown
Teachers - Mid-level Associates	$75,000	1	2	4	4	4	
Teachers - Junior Associates	$65,000	3	6	8	8	8	
INSTRUCTIONAL STAFF SALARY TOTALS		**$410,000**	**$780,000**	**$1,200,000**	**$1,200,000**	**$1,200,000**	
NON-INSTRUCTIONAL STAFF	AVERAGE ANNUAL SALARY	NUMBER OF FTE					NOTES AND ASSUMPTIONS
		Year 1	Year 2	Year 3	Year 4	Year 5	
Nurse	$65,000			1	1	1	
Custodian							
Security							
Other Non-Insructional Staff							
Insert custom non-instructional staff							
Insert custom non-instructional staff							
NON-INSTRUCTIONAL STAFF SALARY TOTALS		**$0**	**$0**	**$65,000**	**$65,000**	**$65,000**	

BENEFITS MINIMUM							
PAYROLL TAXES AND BENEFITS	% OF SALARIES	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Social Security	6.20%	$52,700	$75,640	$116,870	$116,870	$116,870	
Employer Medicare	1.45%	$12,325	$17,690	$27,333	$27,333	$27,333	
State Unemployment	1.00%	$8,500	$12,200	$18,850	$18,850	$18,850	
Worker's Compensation Insurance	0.38%	$3,230	$4,636	$7,163	$7,163	$7,163	
Health/Medical Insurance	11.97%	$101,745	$146,034	$225,635	$225,635	$225,635	
Dental Insurance		$0	$0	$0	$0	$0	
Vision Insurance		$0	$0	$0	$0	$0	
Life Insurance		$0	$0	$0	$0	$0	
Pensions/Retirement	9.00%	$76,500	$109,800	$169,650	$169,650	$169,650	
Overall benefits		$0	$0	$0	$0	$0	Includes SS, Medicare, Workers' Comp, medical insurance
Insert custom benefit		$0	$0	$0	$0	$0	
PAYROLL TAXES AND BENEFITS TOTALS	**30.00%**	**$255,000**	**$366,000**	**$565,500**	**$565,500**	**$565,500**	

SALARY AND BENEFITS SUMMARY MINIMUM						
	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Total Administrative Staff Salaries	$440,000	$440,000	$620,000	$620,000	$620,000	
Total Administrative Staff Benefits	$132,000	$132,000	$186,000	$186,000	$186,000	
Total Instructional Staff Salaries	$410,000	$780,000	$1,200,000	$1,200,000	$1,200,000	
Total Instructional Staff Benefits	$123,000	$234,000	$360,000	$360,000	$360,000	
Total Non-Instructional Staff Salaries	$0	$0	$65,000	$65,000	$65,000	
Total Non-Instructional Staff Benefits	$0	$0	$19,500	$19,500	$19,500	
TOTAL SALARIES AND BENEFITS	**$1,105,000**	**$1,586,000**	**$2,450,500**	**$2,450,500**	**$2,450,500**	

BUDGET SUMMARY MINIMUM						
	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Total revenue	$2,450,126	$3,690,252	$5,030,377	$5,030,377	$5,030,377	
Total expenditures	$2,316,948	$3,422,626	$4,811,193	$4,846,355	$4,881,719	
Net operating income	$133,178	$267,626	$219,184	$184,022	$148,658	
Revenue per pupil	$27,224	$20,501	$18,631	$18,631	$18,631	
Expenses per pupil	$25,744	$19,015	$17,819	$17,949	$18,080	

REVENUE MINIMUM						
PER-PUPIL FUNDING	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**NOTES AND ASSUMPTIONS**
Average per-pupil state and local funding	$1,427,760	$2,855,520	$4,283,280	$4,283,280	$4,283,280	
Average per-pupil federal funding	$2,360	$2,360	$2,360	$2,360	$2,360	
TOTAL FEDERAL, STATE, LOCAL PER-PUPIL REVENUE	**$1,640,126**	**$3,280,252**	**$4,920,377**	**$4,920,377**	**$4,920,377**	
OTHER (FUNDRAISING, LOANS, ETC.)	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**NOTES AND ASSUMPTIONS**
TISA Outcomes Funding		$10,000	$10,000	$10,000	$10,000	
CSP Start Up Grant	$425,000					
National Grants	$185,000	$250,000				
Nashville Grants	$150,000	$100,000	$50,000	$50,000	$50,000	Nashville Funding Collaborative
Individual Donations	$50,000	$50,000	$50,000	$50,000	$50,000	
TOTAL OTHER REVENUE	**$810,000**	**$410,000**	**$110,000**	**$110,000**	**$110,000**	

EXPENDITURES MINIMUM						
SALARIES AND BENEFITS	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**NOTES AND ASSUMPTIONS**
TOTAL SALARIES AND BENEFITS	**$1,105,000**	**$1,586,000**	**$2,450,500**	**$2,450,500**	**$2,450,500**	
CONTRACTED SERVICES	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**NOTES AND ASSUMPTIONS**
Accounting/audit	$80,000	$100,000	$125,000	$150,000	$175,000	Includes third party back office support
Legal	$5,000	$5,100	$5,202	$5,306	$5,412	
Management company fee						
Payroll service	$1,386	$2,366	$3,450	$3,519	$3,589	
School lunch/food service	$129,600	$259,200	$388,800	$388,800	$388,800	$3/breakfast; $5/lunch (180 days)
Special education services	$14,213	$19,921	$30,151	$30,151	$30,151	
Student support services						
Consultants	$3,570	$3,641	$3,714	$3,789	$3,864	E-rate consultant
Dues and Memberships	$1,530	$1,561	$1,592	$1,624	$1,656	
Teacher Resident Fees	$10,000	$10,000	$20,000	$20,000	$20,000	NTR, Belmont, etc
TOTAL CONTRACTED SERVICES	**$245,299**	**$401,789**	**$577,909**	**$603,189**	**$628,472**	
SCHOOL OPERATIONS	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**NOTES AND ASSUMPTIONS**
Board expenses						
Classroom / Teaching Supplies and Materials	$23,148	$39,336	$56,407	$56,407	$56,407	structional supplies, library books, teacher and student supplie
Field Trips	$6,875	$11,607	$21,458	$21,458	$21,458	
Fundraising Expenses						
Office Expenses	$15,464	$28,414	$44,625	$45,518	$46,428	
Other Equipment	$59,000	$62,000	$20,000	$20,000	$20,000	nt laptop (Yr 1 staff and student laptops included in Year 0) ; r
Other Student Services						
Special Education Supplies and Materials	$3,241	$5,507	$7,897	$7,897	$7,897	
Staff Development	$14,280	$23,930	$35,020	$35,720	$36,435	
Staff Recruitment	$5,000	$5,000	$5,000	$5,000	$5,000	
Staff Travel						
Student Recruitment / Marketing	$23,460	$23,929	$24,408	$24,896	$25,394	
Student Testing and Assessment	$9,900	$20,196	$30,900	$31,518	$32,148	
Student Transportation	$80,000	$160,000	$240,000	$240,000	$240,000	
Supplies and Other Materials	$25,375	$37,500	$50,000	$51,000	$52,020	
Technology	$29,292	$46,625	$63,691	$64,965	$66,264	
Telephone	$2,550	$2,601	$2,653	$2,706	$2,760	
Textbooks / Workbooks	$9,167	$18,667	$28,611	$28,611	$28,611	
Authorizer Fees	$35,000	$35,000	$35,000	$35,000	$35,000	
Educational Software (AI tools)	$22,000	$44,880	$68,666	$70,039	$71,440	
Insert custom operations expense						
TOTAL SCHOOL OPERATIONS	**$363,752**	**$565,192**	**$734,336**	**$740,735**	**$747,262**	
FACILITY OPERATIONS & MAINTENANCE	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**NOTES AND ASSUMPTIONS**
Equipment	$20,000					IT/internet equipment installation
Facilities cost (rent/debt, interest payments, etc.)	$256,997	$513,994	$770,990	$770,990	$770,990	
Furniture	$100,000	$100,000				
Insurance	$19,250	$30,800	$42,900	$43,758	$44,633	
Janitorial Services	$66,600	$72,200	$79,254	$80,839	$82,456	
Repairs and Maintenance	$40,000	$51,000	$52,020	$53,060	$54,122	
Security Services	$20,000	$20,000	$20,000	$20,000	$20,000	
Utilities	$80,050	$81,651	$83,284	$83,284	$83,284	
Insert custom facilities expense						
Insert custom facilities expense						
Insert custom facilities expense						
TOTAL FACILITY OPS & MAINTENANCE	**$602,897**	**$869,645**	**$1,048,448**	**$1,051,931**	**$1,055,485**	

STUDENT ENROLLMENT SUMMARY PLANNED					
	Year 1	Year 2	Year 3	Year 4	Year 5
Kindergarten					
1st Grade					
2nd Grade					
3rd Grade					
4th Grade					
5th Grade					
6th Grade	108	108	108	108	108
7th Grade		108	108	108	108
8th Grade			108	108	108
9th Grade					
10th Grade					
11th Grade					
12th Grade					

Total Enrollment	108	216	324	324	324

Change in Net Enrollment	108	108	108	0	0

PERSONNEL COUNTS PLANNED							
ADMINISTRATIVE STAFF	AVERAGE ANNUAL SALARY	NUMBER OF FTE					NOTES AND ASSUMPTIONS
		Year 1	Year 2	Year 3	Year 4	Year 5	
Executive Management (CEO, ED)	$120,000	1	1	1	1	1	Executive Partner
School Leadership (Principals, Assistant Principals)	$120,000	2	2	4	4	4	Operations Partner (Y1+), Culture Partner (Y1+), Student S
Deans, Directors, and Coordinators	$85,000	1	1	1	1	1	Director of Operations
CFO/Director of Finance							
Operations/Business Manager	$55,000	1	1	1	1	1	Front Office Coordinator
Administrative Staff							
Other Administrative Staff							
Director of Talent and Enrollment	$80,000			1	1	1	
Insert custom administrative staff							
ADMINISTRATIVE STAFF SALARY TOTALS		**$440,000**	**$440,000**	**$820,000**	**$820,000**	**$820,000**	
INSTRUCTIONAL STAFF	AVERAGE ANNUAL SALARY	NUMBER OF FTE					NOTES AND ASSUMPTIONS
		Year 1	Year 2	Year 3	Year 4	Year 5	
Teachers - Regular							
Teachers - SPED							
Teachers - EL							
Teaching Assistant							
Specialty Teachers							
Aides - Co Teaching Apprentices/Para's	$40,000	1	2	3	3	3	Co-teaching apprentice/paraprofessionals
Therapists and Counselors							
Substitute Teachers							
Librarian							
Teacher - Senior Associates	$100,000	2	3	4	4	4	In Year 1 and 2 includes SPED Senior Associate
Teacher - Mid Level Associates	$75,000	3	3	6	6	6	In year 1-3 includes EL Mid-Level Associate, In Year 3 includes SPED Mid-Level Associate
Teacher - Junior Associates	$65,000	3	8	10	10	10	In Year 2 and 3 includes SPED Junior Associate, and in Year 3 includes EL Junior Associate
INSTRUCTIONAL STAFF SALARY TOTALS		**$660,000**	**$1,125,000**	**$1,620,000**	**$1,620,000**	**$1,620,000**	
NON-INSTRUCTIONAL STAFF	AVERAGE ANNUAL SALARY	NUMBER OF FTE					NOTES AND ASSUMPTIONS
		Year 1	Year 2	Year 3	Year 4	Year 5	
Nurse	$65,000			1	1	1	
Custodian							
Security							
Other Non-Insructional Staff							
Insert custom non-instructional staff							
Insert custom non-instructional staff							
NON-INSTRUCTIONAL STAFF SALARY TOTALS		**$0**	**$0**	**$65,000**	**$65,000**	**$65,000**	

BENEFITS PLANNED							
PAYROLL TAXES AND BENEFITS	% OF SALARIES	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Social Security	6.20%	$68,200	$97,030	$155,310	$155,310	$155,310	
Employer Medicare	1.45%	$15,950	$22,693	$36,323	$36,323	$36,323	
State Unemployment	1.00%	$11,000	$15,650	$25,050	$25,050	$25,050	
Worker's Compensation Insurance	0.38%	$4,180	$5,947	$9,519	$9,519	$9,519	
Health/Medical Insurance	11.97%	$131,670	$187,331	$299,849	$299,849	$299,849	
Dental Insurance		$0	$0	$0	$0	$0	
Vision Insurance		$0	$0	$0	$0	$0	
Life Insurance		$0	$0	$0	$0	$0	
Pensions/Retirement	9.00%	$99,000	$140,850	$225,450	$225,450	$225,450	
Overall benefits		$0	$0	$0	$0		
Insert custom benefit		$0	$0	$0	$0	$0	
PAYROLL TAXES AND BENEFITS TOTALS	**30.00%**	**$330,000**	**$469,500**	**$751,500**	**$751,500**	**$751,500**	

SALARY AND BENEFITS SUMMARY PLANNED						
	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Total Administrative Staff Salaries	$440,000	$440,000	$820,000	$820,000	$820,000	
Total Administrative Staff Benefits	$132,000	$132,000	$246,000	$246,000	$246,000	
Total Instructional Staff Salaries	$660,000	$1,125,000	$1,620,000	$1,620,000	$1,620,000	
Total Instructional Staff Benefits	$198,000	$337,500	$486,000	$486,000	$486,000	
Total Non-Instructional Staff Salaries	$0	$0	$65,000	$65,000	$65,000	
Total Non-Instructional Staff Benefits	$0	$0	$19,500	$19,500	$19,500	
TOTAL SALARIES AND BENEFITS	**$1,430,000**	**$2,034,500**	**$3,256,500**	**$3,256,500**	**$3,256,500**	

BUDGET SUMMARY PLANNED						
	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Total revenue	$2,813,112	$4,381,224	$6,049,336	$6,049,336	$6,049,336	
Total expenditures	$2,783,049	$4,065,460	$5,830,311	$5,879,472	$5,918,913	
Net operating income	$30,063	$315,765	$219,025	$169,864	$130,423	
Revenue per pupil	26047.33407	20283.44519	18670.79086	18670.79086	18670.79086	
Expenses per pupil	25768.97037	18821.57222	17994.78827	18146.51833	18268.25059	

REVENUE PLANNED						
PER-PUPIL FUNDING	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Average per-pupil state and local funding	$1,713,312	$3,426,624	$5,139,936	$5,139,936	$5,139,936	
Average per-pupil federal funding	$2,359	$2,359	$2,359	$2,359	$2,359	See narrative for federal funding breakout
TOTAL FEDERAL, STATE, LOCAL PER-PUPIL REVENUE	**$1,968,112**	**$3,936,224**	**$5,904,336**	**$5,904,336**	**$5,904,336**	
OTHER (FUNDRAISING, LOANS, ETC.)	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
TISA Outcomes Funding		$10,000	$10,000	$10,000	$10,000	
CSP Start Up Grant	$425,000					
National Grants	$185,000	$250,000				
Nashville Grants	$150,000	$100,000	$50,000	$50,000	$50,000	Nashville Funding Collaborative
Individual Donations	$85,000	$85,000	$85,000	$85,000	$85,000	Includes foundation/corporate support & individual fundraisi
TOTAL OTHER REVENUE	**$845,000**	**$445,000**	**$145,000**	**$145,000**	**$145,000**	

EXPENDITURES PLANNED						
SALARIES AND BENEFITS	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
TOTAL SALARIES AND BENEFITS	**$1,430,000**	**$2,034,500**	**$3,256,500**	**$3,256,500**	**$3,256,500**	
CONTRACTED SERVICES	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Accounting/audit	$80,000	$100,000	$125,000	$150,000	$175,000	Includes third party back office support
Legal	$10,000	$20,000	$20,400	$20,808	$21,224	
Management company fee						
Payroll service	$1,386	$2,366	$3,450	$3,519	$3,589	
School lunch/food service	$155,520	$311,040	$466,560	$466,560	$466,560	$3/breakfast; $5/lunch (180 days)
Special education services	$16,400	$23,715	$35,894	$36,612	$37,344	
Student support services						
Consultant(s)	$3,570	$3,641	$3,714	$3,789	$3,864	E-rate consultant
Dues and Memberships	$1,530	$1,561	$1,592	$1,624	$1,656	
Teacher Resident Fees	$10,000	$10,000	$20,000	$30,000	$30,000	NTR, Belmont, etc
TOTAL CONTRACTED SERVICES	**$278,406**	**$472,323**	**$676,610**	**$712,912**	**$739,238**	
SCHOOL OPERATIONS	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Board expenses						
Classroom / Teaching Supplies and Materials	$27,778	$47,203	$67,688	$69,042	$70,423	structional supplies, library books, teacher and student supplie
Field Trips	$8,250	$16,830	$25,750	$26,265	$26,790	
Fundraising Expenses						
Office Expenses	$15,464	$29,914	$44,625	$45,518	$46,428	
Other Equipment	$72,800	$77,800	$20,000	20000	$20,000	ht laptop (Yr 1 staff and student laptops included in Year 0); re
Other Student Services						
Special Education Supplies and Materials	$4,522	$7,684	$11,019	$11,239	$11,464	
Staff Development	$14,280	$23,930	$35,020	$35,720	$36,435	
Staff Recruitment	$5,000	$5,000	$5,000	$5,000	$5,000	
Staff Travel						
Student Recruitment / Marketing	$23,460	$23,929	$24,408	$24,896	$25,394	
Student Testing and Assessment	$9,900	$20,196	$30,900	$31,518	$32,148	
Student Transportation	$160,000	$240,000	$320,000	$320,000	$320,000	Yr 1: 2 buses; Yr 2: 3 buses; Yr 3+: 4 buses
Supplies and Other Materials	$30,450	$45,000	$60,000	$61,200	$62,424	
Technology	$29,292	$46,625	$63,691	$64,965	$66,264	
Telephone	$2,550	$2,601	$2,653	$2,706	$2,760	
Textbooks / Workbooks	$11,000	$22,400	$34,333	$35,020	$35,720	
Authorizer Fees	$35,000	$35,000	$35,000	$35,000	$35,000	
Educational Software (AI tools)	$22,000	$44,880	$68,666	$70,039	$71,440	
Insert custom operations expense						
TOTAL SCHOOL OPERATIONS	**$471,746**	**$688,992**	**$848,753**	**$858,128**	**$867,691**	
FACILITY OPERATIONS & MAINTENANCE	Year 1	Year 2	Year 3	Year 4	Year 5	NOTES AND ASSUMPTIONS
Equipment	$20,000					IT/internet equipment installation
Facilities cost (rent/debt, interest payments, etc.)	$256,997	$513,994	$770,990	$770,990	$770,990	
Furniture	$100,000	$100,000				
Insurance	$19,250	$30,800	$42,900	$43,758	$44,633	
Janitorial Services	$66,600	$72,200	$79,254	$80,839	$82,456	
Repairs and Maintenance	$40,000	$51,000	$52,020	$53,060	$54,122	
Security Services	$20,000	$20,000	$20,000	$20,000	$20,000	
Utilities	$80,050	$81,651	$83,284	$83,284	$83,284	
Insert custom facilities expense						
Insert custom facilities expense						
Insert custom facilities expense						
TOTAL FACILITY OPS & MAINTENANCE	**$602,897**	**$869,645**	**$1,048,448**	**$1,051,932**	**$1,055,485**	

Attachment 10 - Not Applicable - Network Budget

(Only required for sponsors completing Addendum B)

Not Applicable

Attachment 11 - Not Applicable - Network Organization Chart

(Only required for sponsors completing Addendum B)

Not Applicable

Attachment 12 - Not Applicable - ESP Contract

Only required for sponsors completing Addendum C

Not Applicable

Attachment 13 - Not Applicable - Evidence of Support for Conversion

(Only required for sponsors completing Addendum E)

Not Applicable

Attachment 14 - Not Applicable -Residential Facility Documentation

Only required for sponsors completing Addendum F

Not Applicable