



## **Executive Director's Findings and Recommendation Charter School Application for Neely's Bend: A LEAD Public Charter School**

Pursuant to Tennessee Code Annotated (T.C.A.) § 49-1-614, if, at any time, an Achievement School District (ASD)-authorized charter school meets the priority exit criteria set forth in the state's accountability model, then the school may apply to the LEA or the Tennessee Public Charter School Commission ("Commission") for a new charter agreement with a term not to exceed the term of the initial ASD charter agreement.<sup>1</sup> On November 15, 2022, having earned priority exit status on the state's accountability system, the Governing Board of Neely's Bend: A LEAD Public Charter School ("LEAD Neely's Bend") applied to the Commission for continued authorization under the Commission.

Based on the procedural history, findings of fact, analysis, and Review Committee Report attached hereto, I believe that approval of the LEAD Neely's Bend application is in the best interests of the students, local education agency (LEA), or community. Therefore, I recommend that the Commission approve the application for LEAD Neely's Bend.

### **STANDARD OF REVIEW**

Pursuant to T.C.A. § 49-1-614(k)(4) and Commission Rule 1185-01-03, Commission staff and an independent charter application committee conducted a review of LEAD Neely's Bend's application. The Commission's charter application scoring rubric "[r]equires all applicants to present a clear and compelling mission, a quality educational program, a demonstration of community support, a solvent and sustainable budget and contingency financial plans, a clear demonstration of the effectiveness of the model for the target student population, effective governance and management structures and systems, founding team members demonstrating diverse and necessary capabilities in all phases of the school's development, and clear evidence of the applicant's capacity to execute its plan successfully." In addition, the Commission is required to hold a public hearing in the district where the charter school is located.<sup>2</sup>

The Commission has the ability to approve the application, with authorization to continue under the Commission, or deny the application.

### **PROCEDURAL HISTORY**

1. On October 14, 2022, the Governing Board of LEAD Neely's Bend submitted a letter of intent to the Commission expressing its intention to file a charter school application.
2. The Governing Board submitted a charter application in writing to the Commission on November 15, 2022, including submission of all required documents per Commission Rule 1185-01-03.
3. The Commission's review committee independently analyzed and scored the LEAD Neely's Bend application using the Commission's charter application scoring rubric.
4. On December 14, 2022, the Commission staff held a public hearing at LEAD Neely's Bend in Nashville, Tennessee. At the public hearing, the Executive Director, sitting as the Commission's Designee, heard presentations from the school and Metro Nashville Public Schools (MNPS) and took public comment regarding the LEAD Neely's Bend application.

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<sup>1</sup> (T.C.A.) § 49-1-614

<sup>2</sup> Commission Rule 1185-01-03

5. The Commission’s review committee conducted a capacity interview with key members of the LEAD Neely’s Bend leadership team on December 20, 2022 via Microsoft Teams.
6. After the capacity interview, the Commission’s review committee determined a final consensus rating of the LEAD Neely’s Bend application, which served as the basis for the Review Committee Recommendation Report, attached hereto as **Exhibit A**.

**Commission’s Review Committee’s Evaluation of the Application**

Commission staff assembled a diverse review committee of internal and external experts to independently evaluate and score the LEAD Neely’s Bend application. This review committee consisted of the following individuals:

<b>Name</b>	<b>Title</b>
Caitlin Bullard	External Reviewer
Trent Carlson	Commission Staff, Authorizing Coordinator
DreJean Cummings	Commission Staff, Special Assistant to the Executive Director
Chad Fletcher	External Reviewer
Maggie Lund	Commission Staff, Deputy Director of Authorizing
Grant Monda	External Reviewer

The review committee conducted an initial review and scoring of the LEAD Neely’s Bend application, a capacity interview with the LEAD Neely’s Bend leadership team, and a final evaluation and scoring of the application, resulting in a consensus rating for each major section. The review committee’s consensus rating of the LEAD Neely’s Bend application was as follows:

<b>Sections</b>	<b>Ratings</b>
Academic Plan Design and Capacity	Meets or Exceeds
Operations Plan and Capacity	Meets or Exceeds
Financial Plan and Capacity	Meets or Exceeds
Past Performance	Meets or Exceeds

For additional information regarding the review committee’s evaluation of the LEAD Neely’s Bend application, please see **Exhibit A** for the complete Review Committee Recommendation Report, which is fully incorporated herein by reference.

**Public Hearing**

Pursuant to Commission Rule 1185-01-03 and Commission policy 2.000, a public hearing chaired by the Executive Director was held on December 14, 2022. Dwayne Tucker, the Executive Director of LEAD Public Schools, began by speaking about the history of LEAD Neely’s Bend. Mr. Tucker described how over the last seven years, LEAD has put forth a tremendous amount of work to improve the quality of the school after partnering with the ASD to turn around Neely’s Bend when it fell in the bottom 5% of schools in the state. The school has seen significant progress



due to staff, student, and family commitment to a transformational impact for students, many of whom enter LEAD Neely's Bend 2-3 years behind academically. The seven years of commitment have led to LEAD being the only school in Nashville to exit the priority list early given their TVAAS 5 composite scores since 2017. LEAD Neely's Bend is excited to move to a potential next chapter with the Commission and define a new bar of excellence under a new authorizer.

Shereka Roby-Grant, the Director of Charter Schools for Metro Nashville Public Schools (MNPS), made a statement on behalf of MNPS. This statement outlined the number of students served through MNPS charter schools, along with an organizational chart of oversight provided for charter schools by the district. Ms. Roby-Grant committed that the MNPS Charter Office would continue to provide support to meet the necessary requirements for existing contracted services and will meet with all appropriate LEAD Neely's Bend stakeholders to discuss the next steps in planning for a transition in authorizer.

During questioning by the Commission, Corey Burton, the Director of Enrollment and Family Engagement, spoke to plans to recruit new students to LEAD Neely's Bend outside of the prescribed zone, through door-knocking efforts, bi-weekly canvassing, and building capacity within the team to provide year-round recruitment efforts. The school will also communicate with parents regarding the new opt-in model and engage with community partners and siblings for additional referrals. Adrienne Useted, the Chief Operating Officer of LEAD, then spoke to holistic network team support that provides curriculum coaching, back-office services, and management of vendors, such as custodial service and food service. She stated that they do not anticipate any major changes due to a pending change in authorizer. However, if changes arise, the network-level staff has experience acquiring new services. Tait Danhausen, the former principal of LEAD Neely's Bend, then spoke to their academic plan to continuously improve to meet Commission standards. Mr. Danhausen outlined that the school has seen tremendous growth in proficiency, the school has hired additional leadership support staff for teacher coaching and RTI services, and the school instituted additional interim assessments to obtain better data to determine exactly where students are and what they need. Finally, Ms. Useted spoke to LEAD's intent to continue to provide sibling preference for the two LEAD schools in the area despite a change in authorizer, and she also spoke to the network's commitment to the community and the use of the current building. The school intends to stay in its current location, and it will continue dialogue with MNPS to ensure the school can renew its lease.

The public hearing concluded with closing statements by the school and the receipt of 18 in-person comments, all speaking in support of LEAD Neely's Bend. The Commission also accepted written comments, and the Commission received six written comments, all writing in support of LEAD Neely's Bend.

### **ANALYSIS**

Under T.C.A. § 49-1-614, the Commission is charged with determining if a charter school currently operating under the Achievement School District will continue its authorization under the Commission or remain within the Achievement School District. Pursuant to T.C.A. § 49-13-108, the Commission adopted the State Board of Education's quality public charter schools authorizing standards to review all charter applications received. In making my recommendation to the Commission, I have considered the Review Committee's Recommendation Report, the presentations at the public hearing, and the public comments received by Commission staff and conclude as follows:

In consideration of the Review Committee's Recommendation Report, I find that they have cited specific examples in the application and referenced information gained at the capacity interview in support of its findings. For the reasons delineated in the report, I agree that the LEAD Neely's Bend application has met all requirements for approval as outlined in the scoring rubric for the academic, operational, financial, and past performance sections of



the application. The academic plan is supported strongly by the LEAD network. The school has demonstrated a strong school culture and continued plan to serve the growing English Learner community that has become one of the school's largest subgroups. The school's operations plan includes a strong network team, an experienced governing board, and a contingency plan to support a change to the Commission's authorization. The LEAD network also has demonstrated success across multiple authorizers, which will be imperative for success under the Commission's authority. The school's financial plan included a complete budget and projections, as well as a positive cash flow. The school's past performance also reflected the growth necessary to exit the ASD. It will be important for the school to continue to focus on increasing the academic proficiency levels for all subgroups of students as well as decreasing chronic absenteeism, if approved.

The school earned priority exit status based on the state's accountability system. LEAD Neely's Bend, while acknowledging the success of their academic model and strong network connection, admits that they still have gains to make in proficiency for their students to meet the standards within the Commission's School Performance Framework. The school set forth plans to meet these new standards, including hiring additional staff members and the use of network capacity to meet any needed services. LEAD Neely's Bend has demonstrated clear, strong, and sustained academic growth while operating in the turnaround setting of the Achievement School District.

While the school acknowledges that they still have work to do in order to meet the state's accountability expectations and the Commission's performance standards, I have determined that the school has met the academic and operational achievement to earn an exit from the Achievement School District and to continue the remainder of its charter agreement under the Commission. The Commission holds high expectations for all schools entering its portfolio. The Commission will need to monitor and provide regular oversight, support, and feedback for any school to be successful, especially when a school is moving from a turnaround district. Nevertheless, I have determined that based on the performance record of the school and the application materials, it is in the best interest to allow LEAD Neely's Bend to continue its authorization under the Commission.

### **CONCLUSION**

For these reasons, and for the reasons stated in the Review Committee Report attached hereto as Exhibit A, I believe that the decision to approve the application for LEAD Neely's Bend is in the best interests of the students, the LEA, or community. Therefore, I recommend that the Commission approve the application for LEAD Neely's Bend.

A handwritten signature in cursive script that reads "Tess Stovall".

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Tess Stovall, Executive Director  
Tennessee Public Charter School Commission

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1/27/23  
Date



**EXHIBIT A**

**Charter Application Review Committee Recommendation Report**

January 27, 2023

School Name: Neely's Bend: A LEAD Public School

Charter Management Organization: LEAD Public Schools

Location of School: Nashville, Tennessee

Evaluation Team:

Caitlin Bullard  
Trent Carlson  
DreJean Cummings  
Maggie Lund  
Grant Monda



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



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## Introduction

Pursuant to Tennessee Code Annotated (T.C.A.) § 49-1-614, if, at any time, an Achievement School District (“ASD”) authorized charter school meets the priority exit criteria set forth in the state’s accountability model, then the school may apply to the LEA or the Tennessee Public Charter School Commission (“Commission”) for a new charter agreement with a term not to exceed the term of the initial ASD charter agreement. On November 15, 2022, having earned priority exit status on the state’s accountability system, the Governing Board of LEAD Neely’s Bend applied to the Commission for continued authorization under the Commission. As laid out in Charter Commission Policy 3.000 – Core Authorizing Principles, the Charter Commission is committed to implementing these authorizing standards that are aligned with the core principles of charter school authorizing, including setting high standards for the approval of charter schools in its portfolio.

The Charter Commission’s charter application review process is outlined in Commission Rule 1185-01-03, Charter Commission Policy 2.000 – Charter School Appeals, and Charter Commission Policy 2.100 – Application Review. The Charter Commission assembled a charter application review committee comprised of highly qualified internal and external evaluators with relevant and diverse expertise to evaluate each application. The Charter Commission provided training to all review committee members to ensure consistent standards and fair treatment of all applications.

## Overview of the Evaluation Process

The Tennessee Public Charter School Commission’s charter application review committee developed this recommendation report based on three key stages of review:

1. Evaluation of the Proposal: The review committee independently reviewed the charter application, attachments, and budget submitted by the school. After an independent review, the review committee collectively identified the main strengths, concerns, and weaknesses as well as developed specific questions for the applicant in the four sections of the application: Academic Plan Design, Operations Plan, Financial Plan, and Past Performance.
2. Capacity Interview: Based on the independent and collective review of the application, the review committee conducted a 90-minute interview with the members of the governing board and school leadership to address the concerns, weaknesses, and questions identified in the application, and to assess the capacity to execute the application’s overall plan.
3. Consensus Judgment: At the conclusion of the review of the application and the capacity interview, the committee submitted a final rubric and developed a consensus regarding a rating for each section of the application.

This recommendation report includes the following information:

1. Summary of the application: A brief description of the applicant’s academic, operations, financial plans, and performance review.
2. Summary of the recommendation: A brief summary of the overall recommendation for the application.
3. Analysis of each section of the application: An analysis of the four sections of the application and the capacity of the team to execute the plan as described in the application.
  - a. Academic Plan Design and Capacity: school mission; enrollment summary; academic focus and plan; academic performance standards; high school graduation and post-secondary readiness (if



applicable); assessments; school calendar and schedule; special populations and at-risk students; school culture and discipline; recruitment and enrollment; and parent and community engagement and support.

- b. Operations Plan and Capacity: governance; facilities; personnel/human capital; insurance; transportation; food service; additional operations; charter management organization (if applicable); and waivers.
- c. Financial Plan and Capacity: budgeting; budget narrative; and network financial plan.
- d. Past Performance: an overview of growth and proficiency data for the last three years.

The Charter Commission’s charter application review committee utilized the Tennessee Public Charter School Commission’s Charter Application Rubric for use by Achievement School District Charter Schools applying to the TPCSC<sup>1</sup>, which is used by the Charter Commission when evaluating an application from the Achievement School District. The rubric “[r]equires all applicants to present a clear and compelling mission, a quality educational program, a demonstration of community support, a solvent and sustainable budget and contingency financial plans, a clear demonstration of the effectiveness of the model for the target student population, effective governance and management structures and systems, founding team members demonstrating diverse and necessary capabilities in all phases of the school’s development, and clear evidence of the applicant’s capacity to execute its plan successfully.”

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

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

<sup>1</sup> This rubric was updated in August of 2022 by the Charter Commission.



**Summary of the Application**

School Name: Neely’s Bend: A LEAD Public School

Charter Management Organization: LEAD Public Schools

Location of School: Nashville, Tennessee

Mission:<sup>2</sup>

LEAD Neely’s Bend’s founding mission was to support, train, and educate the next generation of responsible citizens. This mission evolved to a more comprehensive focus on preparing all of our students with the knowledge and skills to succeed in college and life.

Number of Schools Currently in Operation by Governing Board:

There are six schools in the LEAD network.

Proposed Enrollment:<sup>3</sup>

Grade Level	Year 1 2023-24	Year 2 2024-25	Year 3 2025-26 Fully Enrolled
5	50	100	100
6	125	150	150
7	125	125	125
8	125	125	125
Total	425	500	500

Brief Description of the Application:

LEAD Neely’s Bend is a charter school in Davidson County, Tennessee and serves students in the Madison neighborhood of Nashville and the Hunters Lane cluster of Metro Nashville Public Schools (MNPS). LEAD Neely’s Bend is a middle school serving grades 5 through 8. The school intends to continue operating in this neighborhood and will expand its reach outside its current cluster to the greater Madison neighborhood. The school’s educational model is built on the belief that all students can excel when given the right opportunities and support.<sup>4</sup> LEAD Neely’s Bend has emphasized English language arts and literacy as the means for developing lifelong learners through utilizing rigorous, standards-aligned content based in research-proven curricula designed to enhance problem solving and critical thinking skills necessary for college and career readiness. LEAD Neely’s Bend also prioritizes their core value of Ethos by placing a high value on social and emotional learning and creating a joyful school culture.

The LEAD Neely’s Bend governing board is long standing, offers diverse skillsets, and has effectively overseen the school for the last eight years. LEAD Neely’s Bend intends to stay in their current facility upon completion of its ten-year charter term as their facility is an integral part of their community. The school currently has a lease with

<sup>2</sup> LEAD Neely’s Bend Application – p. 3

<sup>3</sup> LEAD Neely’s Bend application – p. 10.

<sup>4</sup> LEAD Neely’s Bend application – p. 3



Metro Nashville Public Schools, and they will engage with MNPS to negotiate a longer lease if approved by the Charter Commission and upon completion of their current charter agreement term. LEAD Neely's Bend is operating in a strong financial position with a projected net income of \$1,304,095 for the 2022-2023 school year and a projected net income of \$309,928 for the 2023-2024 school year, with the reduction due to a projected decrease in federal funding levels and increased operating costs including facility related expenses and contracted services.<sup>5</sup> They have demonstrated conservative budgeting practices that allow the school to effectively use its funds to maintain its mission and vision.

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<sup>5</sup> LEAD Neely's Bend provided budget – Attachment K



## Summary of the Evaluation

The review committee recommends approval of the application for LEAD Neely's Bend because the applicant meets the standards in the academic, operations, financial, and past performance sections of the rubric.

Throughout the application and capacity interview, LEAD Neely's Bend leadership spoke to their strong school culture and clear emphasis on literacy instruction, which the school believes drives success in all content areas and is a core tenant of their instruction. LEAD Neely's Bend has also experienced a shift in demographics of its student population throughout its charter term, as the school now serves a much larger number of English Learners than when it opened. To better support the growing number of English Learners, LEAD Neely's Bend redesigned its English Language Arts (ELA) curriculum. School leadership spoke to the importance of strong literacy support, including for English Learners, to improve student performance across content areas. Additionally, the school demonstrates a commitment to data-driven instruction and has a robust assessment plan to continually assess and monitor student progress. LEAD Neely's Bend receives robust support and resources from the LEAD network, which includes support in analyzing and responding to student data. The LEAD network also has experience navigating two different authorizers, which sets LEAD Neely's Bend up for a successful transition to a new authorizer and an open enrollment model.

The applicant's operations plan met standard as they have a knowledgeable network team, an experienced, capable governing board, and adequate contingency planning for an impending change in authorizers. The LEAD network is comprised of individuals with relevant experience and expertise who have supported the network's six schools, including LEAD Neely's Bend. Network leadership and members of the governing board participated in the capacity interview and demonstrated the knowledge and capacity to offer support to the school as it prepares for the potential change in authorization including speaking to potential funding changes, changes in enrollment and recruitment plans, and academic support for school-level leadership. The applicant also demonstrated adequate contingency planning for services and processes such as transportation and facility acquisition.

The financial plan also met standard as the budget and projections are complete, include conservative estimations, reflect a positive cash flow, and demonstrate that the school and network are in strong financial positions. In the capacity interview, network leadership spoke about how the school is budgeting for the shift in state funding from BEP to TISA and indicated that LEAD anticipates that Neely's Bend TISA rates will be higher than rates currently allocated by BEP. Additionally, it was shared in the capacity interview that the network, due to their stable financial position, was able to pay off a loan for another facility in their network early all while maintaining a growing cash position.

Finally, the applicant's past performance met standard. LEAD Neely's Bend earned priority exit from the Achievement School District (ASD) due to three consecutive TVAAS composite level 5 scores in previous years and a success rate of 10.3% in 2022. LEAD Neely's Bend has outperformed the ASD in both ELA and math proficiency on TNReady assessments since 2018 and is the second highest performing middle school in the ASD. Additionally, student growth data on NWEA MAP assessments shows a significant bounce-back in reading and math growth post-pandemic.



Summary of Section Ratings

In accordance with the Charter Commission’s charter application scoring rubric, applications that do not meet or exceed the standard in all sections will be deemed not ready for approval.<sup>6</sup> The review committee’s consensus ratings for each section of the application are as follows:

<b>Sections</b>	<b>Rating</b>
Academic Plan Design and Capacity	Meets Standard
Operations Plan and Capacity	Meets Standard
Financial Plan and Capacity	Meets Standard
Past Performance	Meets Standard

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<sup>6</sup> Tennessee Public Charter School Commission ASD Application Scoring Rubric

## **Analysis of the Academic Plan Design**

*Rating: Meets Standard*

### **Strengths Identified by the Committee:**

The review committee found that the applicant's Academic Plan Design meets the standard because LEAD Neely's Bend has developed a strong academic instructional model to meet the needs of its students, the school redesigned curriculum to be more supportive of the school's growing English Learner (EL) population, and LEAD is a strong network offering academic support and resources to the school.

In both the application and capacity interview, school leadership attributed much of LEAD Neely's Bend's success to the school's mission, model, and people. There is an emphasis on literacy instruction, which LEAD Neely's Bend believes drives success in all subject areas and therefore is a core tenet of the school's instruction. Along with its focus on literacy, LEAD Neely's Bend prioritizes data-driven instruction. In the capacity interview, school leadership spoke to the school's intentional use of data to drive planning and instruction. The school relies on FastBridge benchmark data and students' NWEA MAP scores to determine intervention placement of students, which begins before each school year and is reassessed after each benchmark or interim assessment. Additionally, weekly assessments are administered in classes to gauge student understanding and determine what remediation may be necessary. Weekly data meetings are held to evaluate assessment data and responsively plan future lessons. The success of LEAD Neely's Bend instructional model is evidenced in part by earning three consecutive TVAAS composite scores of 5 in previous years.

As stated in the application, LEAD Neely's Bend has experienced a shift in demographics of its student population over the course of its charter term. In both the application and the capacity interview, the school discussed how it responded to the changing demographics of its student population by redesigning its English Language Arts (ELA) curriculum to be more supportive of the growing English Learner population. Furthermore, LEAD Neely's Bend has hired additional staff members specifically responsible for ELA intervention which allows for the school to provide more specialized support for English Learners in the general education setting. LEAD Neely's Bend also hired an additional Assistant Principal of Instruction who manages the school's ELA instructional coach. In the capacity interview, leadership explained that these additional hires were due to both the determined need for increased support in ELA and the belief that bridging gaps in reading proficiency is a key driver for bridging gaps across all content areas. While these recent adjustments demonstrate the school's commitment to being responsive to changing demographics and student performance data, the review committee was left with questions regarding the efficacy of the programming shifts to ELA, particularly for the English Learner subgroup as proficiency rates remain low.

Another strength that was apparent within the application and capacity interview is the support and resources the school receives from the LEAD network. LEAD has a track record of success, operating six schools across Nashville. LEAD Neely's Bend has access to the experience and resources of the network and rely on its support when necessary. For example, when questioned about challenges the school faces during the capacity interview, leadership spoke to new hires at the network level focused on further developing content knowledge and expertise of school-based instructional coaches and teachers. The network leadership team also examines student data frequently and determines school-based support accordingly, further evidencing the data-driven approach to which LEAD is committed. Additionally, the LEAD network has experience navigating two different authorizers for their six schools, which demonstrates experience in developing and maintaining systems to ensure compliance to district and state



requirements for its schools. For instance, because the network operates open-enrollment charter schools in Nashville, LEAD is familiar with the open enrollment model and the need for robust recruitment plans to maintain stable enrollment, as well as has an understanding of the lottery process. While the transition from a zoned school to an open-enrollment school, along with a change in authorizer, can present challenges for many schools, LEAD Neely's Bend demonstrated the support and experience necessary to ensure a smooth and successful transition.

## **Analysis of the Operations Plan**

*Rating: Meets Standard*

### **Strengths Identified by the Committee:**

The applicant's Operations Plan meets the standard they have an active governing board of thirteen members with diverse experience, network staff with varied experience providing robust support to the school, a staffing plan to address teacher retention, and adequate contingency planning for an impending change in authorizers.

The governing board of LEAD has effectively governed the organization and is comprised of individuals that represent the major constituencies needed to support effective operations including academics, finance, fundraising, marketing, information technology, human resources, and facilities acquisition and management. Additionally, LEAD has a robust network team comprised of experienced education professionals including a chief academic officer, head of middle schools, head of high schools, chief financial officer, chief operational officer, chief HR officer, vice president of development, director of enrollment and family engagement, and director of communications. The network team is highly knowledgeable about the school, curriculum, and day-to-day operations, and they participated heavily in the capacity interview. It is clear that the network team is made up of high-capacity individuals that offer wrap around support for LEAD Neely's Bend.

LEAD Neely's Bend has made significant investments in increasing teacher retention rates over the last few years, attempting to make the profession more competitive. Master Teachers at LEAD Neely's Bend can now earn up to \$100,000 by staying in the classroom, and returning teachers now earn up to a 10% increase in pay per year based on performance. Additionally, in a recent survey conducted by LEAD Neely's Bend, there were noted increases in teacher satisfaction than in previous years. These investments are promising given that LEAD Neely's Bend teacher retention rates fall below the Commission's standard within the School Performance Framework of 75% teacher retention. This retention plan coupled with robust network support demonstrates LEAD Neely's Bend's intent to continuously improve to meet standard under the Commission's School Performance Framework.

LEAD Public Schools currently has a lease with Metro Nashville Public Schools for the LEAD Neely's Bend facility. LEAD Neely's Bend intends to stay in this facility for a minimum of three more years upon which the charter term expires. LEAD Neely's Bend will engage with MNPS to enter into a longer-term lease agreement or to purchase the facility, as they intend to continue serving the Madison neighborhood and their current families. However, should LEAD Neely's Bend need to acquire a new facility, LEAD will work with a third-party facilities acquisition company to find a new facility within the same neighborhood. The LEAD network and governing board has experience acquiring facilities as with their LEAD Southeast facility, and the network staff and governing board have already begun completing due diligence as a contingency plan. The applicant also has sound contingency plans to adjust transportation as it begins to expand its enrollment zone by adding additional routes. Finally, the applicant does not anticipate any changes in food service and other vendors through the transition in authorizers, though should it need to enact a contingency plan to cover these costs, the network is in a strong financial position to do so.

## **Analysis of the Financial Plan**

*Rating: Meets Standard*

### **Strengths Identified by the Committee:**

The applicant's financial plan meets the standard because the budget and projections are complete, and the documentation provided demonstrates a sound overall financial position. LEAD Neely's Bend provided conservative estimations within their three-year projections and reflected positive cash flow.

LEAD Neely's Bend is in a financially secure position with a budgeted net income for the 2022-2023 school year of \$1,304,095 and a projected net income for the following year (2023-2024) of \$309,928. This reduction in projected net income accounts for a reduction in federal funding levels and increased operating costs related to a potential change in authorization including facility related expenses and contracted services. There is also an anticipated \$1.2 million in philanthropic funds built into the budget, though many anticipated revenue streams have been budgeted conservatively based on average amounts received to allow for flexibility within the budget. During the capacity interview, LEAD's Chief Financial Officer (CFO) discussed the anticipated shift from BEP to TISA. She anticipates that the TISA funding amounts will be higher than the current BEP amounts based on what they project for English Learner and Economically Disadvantaged rates. The network is continuing to work to ensure that all demographic information for students is up to date in state student information systems and will continue to adjust their budgets accordingly as further information is released.

The CFO also discussed how costs are distributed amongst schools within the LEAD Public Schools network. Each school within the network pays a 14.9% management fee to the network that covers the cost of all network level employees along with shared costs such as legal, human resources, and other operational support. The network does not bill schools for any costs above the 14.9% fee and each school is responsible for their own school-level expenses and staffing. During the capacity interview, review committee members inquired about the staffing budget given the adjustments made in salaries to attract and retain high quality teachers. The CFO clarified that the total employee salaries budgeted for the 2022-2023 school year of \$3,338,500 are reflective of current school-based instructional and leadership staffing based on experience and one master teacher. The subsequent two-year projections are adjusted to reflect an increase in personnel costs to serve the projected increase in student population. Additionally, there is flexibility within the budget to compensate additional staff commensurate to experience.

In order to corroborate the financial standing information provided within the application and budget attachments, the review committee also examined LEAD Public School's unaudited financials for the 2021-2022 school year since the FY22 audit had not been completed at the time of the review. Within the unaudited financials, there was a loan payment of over \$5 million dollars noted for October 2022. The CFO explained that this was for a school facility within their portfolio that they were able to pay off early given their cash position. Given that this facility has been paid for, they are no longer in debt for any school facility and are still maintaining a healthy cash position. This also puts LEAD Public Schools in a favorable position should they need to enact contingency planning and acquire a new facility for LEAD Neely's Bend through the transfer of authorizers if approved by the Commission.



## **Analysis of Past Performance**

*Rating: Meets Standard*

### **Strengths Identified by the Committee:**

The review committee determined that the application's past performance meets standard because LEAD Neely's Bend earned priority exit from the Achievement School District (ASD) in part due to three consecutive years of scoring a TVAAS composite Level 5, the school has outperformed ASD averages on TNReady ELA and Math since 2018, and the significant bounce-back in students' NWEA MAP growth scores since the 2019-2020 school year and the COVID-19 pandemic.

LEAD Neely's Bend earned priority exit status from the ASD after ending the 2021-2022 school year with three consecutive years of earning a TVAAS composite Level 5. Their consistent TVAAS scores are not only indicators that led to LEAD Neely's Bend earning priority exit from the ASD, but it also demonstrates a track record of success in terms of the school growing students toward academic proficiency. The review committee highlighted these scores as a clear example of successes in past performance and noted that if continued, it sets the school up to exceed TVAAS expectations set forth in the Commission's School Performance Framework.

In addition to a track record of demonstrating student growth, LEAD Neely's Bend has historically outperformed the ASD in the percent of students who are proficient on TNReady. The application shows that since 2018, LEAD Neely's Bend has had a higher percentage of students reaching proficiency standards on TNReady in both ELA and math than the ASD average. Additionally, the application noted that LEAD Neely's Bend is the second highest performing middle school in the ASD. The school demonstrated clear plans within the application to continue this trajectory of growth and achievement, and address challenges, in order to move closer to meeting academic thresholds on the Charter Commission's School Performance Framework.

Lastly, the review committee noted the significant bounce-back since the pandemic in LEAD Neely's Bend's students' NWEA MAP growth scores. Between school year 2019-2020 and 2020-2021, average years of growth in MAP Reading nearly doubled across all grade levels. Average years of growth in MAP Math also improved, with the most significant improvements made in 5th and 6th grade. LEAD Neely's Bend also demonstrated improvement in achievement on the 2021-2022 TNReady test. While the applicant acknowledged the significant dip in scores the school saw during the pandemic, much like many other middle schools, it also noted that on the spring 2022 TNReady test, math proficiency doubled, and ELA proficiency also increased, though by a smaller margin. In the application, the school explained its plans to address continued challenges to ensure improvement in proficiency, particularly for subgroups of students, and in the capacity interview, school leadership shared that English Learners were progressing and exiting the program at a higher rate than the school has typically seen.

### **Weaknesses Identified by the Committee:**

While the past performance section was found to meet standard, the review committee noted remaining concerns with low academic proficiency levels overall, uncertainty about the effectiveness and outcomes of the shifts to their RTI and MTSS models, and a continued rise in chronic absenteeism.

Concerns remained regarding the proficiency data overall and for subgroups of students. Both the data from state assessments and internal data assessment submitted by the school indicate that there are achievement gaps, particularly for English Learners and students with disabilities. For the 2021-2022 school year, less than 10% of



students were proficient on TNReady in both ELA and math and less than 5% of English Learners were proficient in both ELA and math. As stated in the Academic Plan's strengths, LEAD Neely's Bend has adjusted its curriculum and instruction considering the changing demographics of its student population. However, the review committee noted that there was little data provided to demonstrate the effectiveness of these changes for the student subgroups noted. Under the Charter Commission's Student Performance Framework, there is a noted focus on subgroup comparative data; therefore, English Learner performance will need to continue to be an area of focus for the school. Finally, the review committee remains concerned with the school's chronic absenteeism rate, as it continues to increase and was 39.4% in 2022. In both the application and capacity interview, the school stated that chronic absenteeism remains a challenge and shared the steps being taken to address the concern.



### Evaluation Team

**Caitlin Bullard** is the Coordinator of School Choice and Charter Schools for Rutherford County Schools, where she oversees all authorizing responsibilities and has led the expansion of the district's school choice program. She began her career as a Nashville Teaching Fellow and middle school teacher. Since then, she has worked in several districts across Middle Tennessee as a teacher, instructional coach, and elementary school principal. Her public education career has focused on centering student outcomes, strategic planning, and high-quality professional development for educators. Caitlin holds a B.S. from Middle Tennessee State University, a M.Ed. in Curriculum and Instruction from Johns Hopkins University, and Education Specialist and Doctorate degrees from Trevecca Nazarene University, where she serves as a dissertation adviser.

**Trent Carlson** is the Authorizing Coordinator for the Tennessee Public Charter School Commission. Prior to joining the Commission, Trent worked in Nashville schools as a middle school teacher in both the public school district and a local public charter school. Trent was a Teach for America corps member and a Leadership for Educational Equity policy and advocacy summer fellow, in which he co-authored the American Federation for Children — Tennessee's report, *The Warmth of Other Schools: Supporting Underrepresented Students in Private Schools*. Trent received an M.Ed. from Lipscomb University and a B.A. from the University of Alabama, where he studied Journalism, Political Science, and History.

**DreJean Cummings** joined the Tennessee Charter School Commission in 2021, serving as the Special Assistant to the Executive Director. Prior to working at the Commission, DreJean held a variety of roles at the Tennessee Department of Education, most recently as the Research Manager for the Research and Evaluation team. She holds a Bachelor of Arts degree from Rhodes College and a Master of Public Policy from Vanderbilt University.

**Chad Fletcher** is the Federal Programs Director for Bedford County Schools. Additionally, he serves as the Safe Schools and District Testing Coordinator. Fletcher began his career as a High School teacher in the Metro-Nashville/Davidson County School System before serving as an Elementary and Middle School Administrator in Murfreesboro City, Knox County, and Manchester City Schools. Additionally, Fletcher currently serves as a member of the DOE's Community of Practitioners for Federal Programs and was a member of the Tennessee Department of Education's Personalized Learning Task Force from 2015-16.

**Maggie Lund** is the Deputy Director of Authorizing at the Tennessee Public Charter School Commission. Additionally, she serves as an adjunct professor in the Lipscomb College of Education Master's Program, teaching Planning, Instruction, and Assessment and Building Classroom Communities. Prior to her role at the Charter Commission, Maggie served as the Director of Family Engagement at STEM Prep Academy where she led all community engagement efforts for two schools along with enrollment, school culture, and operations pieces. Maggie holds a BA in Business Administration and Marketing from Loyola University New Orleans, a Doctor of Education degree, and a Master of Education degree with a specialization in English Language Learning from Lipscomb University. Her dissertation research focused on Restorative Justice Practices and school culture. Most recently, her research article, *Mindsets Matter for Equitable Discipline* was published in the *Middle School Journal*.

**Grant Monda** is in his eighth year with Aurora Collegiate Academy, currently serving as its Executive Director. Aurora is a tuition-free public charter elementary school serving students from all over Shelby County. Grant joined Aurora after completing the prestigious Ryan Fellowship in 2015. In addition to his work at Aurora, Grant has previously taught in Memphis City Schools as a Teacher For America Corps member and served as a district level coach and



evaluator with Shelby County Schools. Grant has reviewed charter applications for the state and Shelby County Schools. He holds a Bachelor of Arts degree from Rhodes College and a Master's in Education from Christian Brothers University.