

# **LEAD Academy**

## **START-UP PUBLIC CHARTER SCHOOL APPLICATION**

**by**

**LEAD Education Foundation  
Montgomery, AL**

**December 18, 2017**

# Table of Contents

<b>Cover Sheet &amp; Enrollment Projection</b>	<b>3</b>
<b>Executive Summary</b>	<b>5</b>
<b>Section 1. Educational Program Design &amp; Capacity</b>	<b>18</b>
<b>Section 2. Operations Plan &amp; Capacity</b>	<b>67</b>
<b>Section 3. Financial Plan &amp; Management Capacity</b>	<b>102</b>

## **ATTACHMENTS REFERENCED IN APPLICATION**

- **Attachment 0**—Resumes of the LEF Board of Directors
- **Attachment 1**—Overview of Planned Curriculum
- **Attachment 2**—School’s Curriculum
- **Attachment 3**—Complete set of the School’s Proposed Learning Standards for Each Grade
- **Attachment 4**—School’s Exit Standards for Graduating Students
- **Attachment 5**—Annual Academic Schedule
- **Attachment 6**—Structure of the School Day & Week, Including Number of Instructional Hours/Minutes
- **Attachment 7**—School Enrollment Plan
- **Attachment 8**—School’s Approach to Student Discipline
- **Attachment 9**—Plan to Inform Students and Parents of School Discipline Policy
- **Attachment 10**—Qualifications, Resume, and Professional Biography of Principal Candidate
- **Attachment 11**—Job Description or Qualifications for Principal Candidate (if not hired)
- **Attachment 12**—Qualifications, Resumes, Biographies of School’s Leadership Team Members
- **Attachment 13**—Proof of 501(c) 3 Non-Profit Status and Federal Tax-Exempt Status
- **Attachment 14**—School Governing Documents Already Adopted (such as Board Policies)
- **Attachment 15**—School Organizational Chart
- **Attachment 16**—Governing Board Bylaws
- **Attachment 17**—Complete Staffing Chart
- **Attachment 18**—Personnel Policies or Employee Manual (if developed)
- **Attachment 19**—Leadership Evaluation Tool(s)
- **Attachment 20**—Educator Evaluation Tool(s)
- **Attachment 21**—Facility MOU or Proof of Intent to Secure Facility and Brief Description of Location
- **Attachment 22**—Supporting Documents Providing Details of Facility
- **Attachment 23**—Detailed Start-Up Plan for School
- **Attachment 24**—School Transportation Plan
- **Attachment 25**—School Insurance Coverage Including Description and Levels of Coverage
- **Attachment 26**—Budget Narrative
- **Attachment 27**—Letters of Support from the Community
- **Attachment 28**—Letter of Credit/Loan



of the proposed school. Additionally, it may also include a specific neighborhood or school with the LEA.

Model or focus of proposed school (e.g., arts, college preparation, dual-language, and/or other):

College Preparation with STREAMS (Science, Technology, Reading, Engineering, Mathematics, Social and Emotional Learning) focus

Does the school intend to contract with a third-party education service provider (ESP) to manage the educational program and operations of the school?

Yes       No

If Yes, identify the ESP or other partner organization: **Unity School Services**

Does the school intend to partner or be affiliated with an organization through which a single governing board governs or will govern multiple schools?

Yes       No

If Yes, identify the organization:

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**Proposed Principal/Head of School Information (if identified):**

Name of proposed principal candidate: **Not Identified** \_\_\_\_\_

Current employment: \_\_\_\_\_

Daytime phone: \_\_\_\_\_ Cell: \_\_\_\_\_

E-mail: \_\_\_\_\_

# Executive Summary

The executive summary should provide a concise statement/synopsis of the following:

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

## Mission and Vision

State the mission and vision of the proposed school. The mission statement describes the fundamental purpose of the school, relating why it will exist. The vision statement outlines how the school will operate and what it aims to achieve in the long term. The mission and vision statements provide the foundation for the entire proposal.

- The mission and vision statements, when combined, should:
- Identify the students and community to be served.
- Illustrate what success will look like.
- Align with the purposes of the Alabama School Choice and Student Opportunity Act (Act 2015-3) and the authorizer's stated priorities for schools.

**The mission** of LEAD Academy is to provide innovative programs designed to spark curiosity, maximize learning potential, continuously improve student achievement by empowering them with 21st century skills.

**The vision** of LEAD Academy is to build leaders by engaging students in an innovative educational program focusing on high achievement and developing the whole child into knowledgeable, productive, and well-rounded citizens.

LEAD Academy will be established by the LEAD Education Foundation (LEF), a Montgomery based non-profit organization. Founders of the LEF are passionate about transforming the K-12 educational system in Montgomery, Alabama by combining their experience in the fields of education and business with the best research based techniques of imparting knowledge to offer a new and innovative charter school program. These "best practices" will include but not be limited to the following: exposing all students to individualized project based learning, higher-level of critical thinking and problem-solving, thematic instruction, and scaffolding instructional practices to positively impact student

learning.

The name LEAD stands for Lead, Engage, Achieve, and Develop. The name of the foundation has been selected by the founders thoughtfully because we want to build strong leaders by engaging students focusing on sustainable achievement and develop the whole child. Founders of the LEF aim to provide an academically rigorous college and career preparatory program for all students regardless of race, gender, ethnic origin, national background, or socioeconomic level.

The LEF founders believe that STEM education is vital and indispensable for making our state and the nation more innovative and competitive. Over the past decade, there has been growing concern regarding America's ability to maintain its competitive position in the ever-evolving global economy. This has resulted in a renewed interest in STEM education. It has come to the notice of many that American students generally score below average in international tests (i.e., PISA) compared to their counterparts abroad. According to the recent PISA test results, amongst the 34 OECD countries, United States ranked 27th in Mathematics, and 20th in science (#01). Our country ranks below Poland, Slovenia, and Estonia in terms of the average scores in STEM subjects.

It is clearly evident that our students are underperforming in Math and Science. PISA test results also show that the scores in Reading are well below the expected level. This fact has been overlooked by most people. The Founders of LEF unanimously agree that "low literacy is related to negative outcomes including increased education costs, higher crime rates, poorer overall health, and a higher rate of dependence on publicly subsidized programs" (#02 Bush).

In order to equip our students with 21st century skills, we will put special emphasis on improvement of the art of reading that includes writing, in addition to STEM. The founding board pledges to create a school environment which promotes holistic development of the students while offering core academic courses as well as social, emotional, and career guidance that leads to inspires students to become good citizens and lifelong learners (#03).

To implement these ideas, we propose to use a new model called STREAMS<sup>360</sup> (Science, Technology, Reading, Engineering, Art, Mathematics, and Social and emotional learning). The 360-degree approach is meant for providing a complete and well-rounded educational program. We believe that this combination of core subject courses with blended Project Based Learning will create an innovative model for our students to be ready not only for college but their careers and future life as well. The concept of STREAMS<sup>360</sup> has been developed by Dr. Soner Tarim who established the largest and most successful STEM program in the nation as a result of his 27 year experiences in the sector.

The founders of the LEF intend to establish a school ecosystem where parents will have assurance that the school is genuinely concerned about the welfare and dignity of their children. Instruction will be student-centered and project-based. Each individual will be recognized as a unique person with various interests and talents. Therefore, individual

attention and motivation will be provided to students with the help of blended learning strategies, intensive counseling in the form of social and emotional learning, and personalized goals. These components are considered the keys to motivate our students. Specific elements will be required to accomplish our mission and vision. These elements will be the building blocks of our program:

### **1) Student Oriented Teaching**

- Individual attention given to each and every student
- Diagnostic tests administered periodically
- Use of data (all forms) to measure student progress
- Early multi-tiered instruction and remediation (After-school and weekend tutorials)
- Individual and/or group research projects assigned to students

### **2) Comprehensive Core Course Curriculum**

- Rigorous and relevant core courses offered (i.e., AP, Dual Credits, etc.)
- PLTW pathways (Engineering, Comp. Sci., Biomedical Sci.) included
- More class hours dedicated to Mathematics and ELA
- More electives offered (i.e., Coding, Animation, Electronics, Robotics, Debate)

### **3) Emphasis on College Bound Education**

- Cultivation college going culture
- Frequent college counseling
- Partnership with universities
- Dual Credit Program
- Visits to college campuses

### **4) Qualified and Dedicated Teachers**

- Rigorous interview process before hiring a teacher
- Ensuring teacher specialization in Math, Science, and Reading for early grade levels
- Diverse faculty and staff
- Frequent home visits
- Use of data to measure teacher retention and satisfaction

### **5) Social and Emotional Learning (#03)**

- Encourage self-awareness and responsibility in all the students
- Promote honesty, cooperation, and social awareness
- Challenge students to develop personal and social skills
- Empowers students' emotional skills to help them make responsible decisions
- Support parental and community involvement

The LEF founders' track record of leading by example is the best way to inspire change. This push for change in the Montgomery education scenario will be realized through the development of a school with high academic standards which will result in higher achievements. The plan of progress will be all-inclusive which will result in complete satisfaction of students as well as their families with the system.

LEAD Academy of Montgomery County is governed by five core values that define our school. These values guide our decision-making in all areas:

- High Expectations
- Dedication

- Integrity
- Teamwork
- Innovation

The Board acknowledges that students face barriers that impact their ability to earn a diploma, acquire a professional license, or attend college. The students we expect to enroll may have family problems, health challenges, or may lack the financial support to achieve their goals. For this reason, the Board believes that the proposed school must provide a comprehensive system of support designed to meet the whole students' needs and is a necessary alternative to the traditional schools in Montgomery County. The Board understands that unless all of the individual student needs are met, including social and emotional, it is difficult for students to reach their true potential.

### **Educational Need and Anticipated Student Population**

Describe the anticipated student population, the students' anticipated educational needs, and non-academic challenges the school is likely to encounter. Describe the rationale for selecting the location and student body. Identify any enrollment priorities on which the program is based consistent with student enrollment eligibility and selection criteria.

LEAD Academy anticipates serving a diverse population of students, with approximately 55% of the population eligible for free and reduced lunches, and more than 82% minority. Historically, students from families with a low socioeconomic level enter school at a disadvantage with a limited vocabulary, reading level and overall parental involvement in academic support. Because many students will come from homes with limited resources, they often do not receive the academic enrichment and support necessary to meet the demands of ever-increasing education standards. Faced with the pressures and realities of high-stakes testing, students often find themselves disenfranchised and struggling to meet expectations of adequate academic progress. Left to their own devices, they fall behind and find it difficult to catch up.

In order to ensure success for all students, we will provide support in the way of tutorials, enrichment classes, mentoring, and guidance counseling (social and emotional learning). Through the use of benchmarks and other authentic assessment data, teachers will be prepared to offer support to students before they fail or fall behind. LEAD Academy will enlist the support of all stakeholders, including parents, teachers, students and community members. When considering academic success, this form of success can encompass the support of struggling students as well as advanced classes for those with a strong foundation and who are ready to excel. Students are provided with a mentor to regularly review academic successes and challenges, and to discuss any obstacles. Struggling students are immediately assigned to tutorials, either one-on-one or small group sessions that provide guided instruction to close learning deficits.



In addition to mentors and tutoring, home visits are an integral part of developing a strong relationship among teachers, students and parents or guardians. All students will be given the option of a home visit by at least one or more staff members. These visits provide the teacher and/or administrator with a clear picture of the students' home life, often leading to an ability to better understand and offer support before, during and after school. Parents are able to ask questions of the visiting staff members, often sharing challenges and concerns as a result of the trust developed. Many students are very excited and energized when teachers take the time to connect with students during the home visits.

The proposed school will start grades K through 5. Gradual increases in enrollment and grade level will allow teachers and school administrators to implement proposed programs carefully to produce positive outcomes. We believe that our dedication, experience, expertise, and resources will enable us to serve more students and their families in Montgomery.

According to the most recent district report, Montgomery Public Schools (MPS) were rated inadequate in four out of the five areas. These areas are 1) Overall Effectiveness, 2) Leadership and Governance, 3) District Support for Learning, and most importantly 4) Student Achievement and Progress (School Outcomes). Therefore, the MPS systems struggle to provide adequate services to its students to meet their individual needs.

The Alabama Accountability Act (AAA) ranks schools using the ACT Aspire results. Montgomery is ranked at the bottom of this list (ALSDE District Review Report-2017). According to the report, in all the 14 elementary schools reviewed by the auditors, the average percentage of students in Grade 3 achieving proficiency in math and reading on the 2015/16 ACT Aspire assessment was below the state average of 59 and 27 percent, respectively. Grade 4, 5, 6, 7, and 8 results were similarly below state average and ranged between 31 to 53 percent for both subjects.

In Montgomery County 77.5% of 10th grade students were identified as in need of support on the Math ACT Aspire District results, 67.4% of 10th grade students were identified as in need of support on the Science ACT Aspire District results, and 50.4% of 10th grade students were identified as in need of support on the Reading ACT District results. Along with the staggering number of students needing support, the climbing college tuitions are hindering the educational progression of low-income students in Montgomery County ("Find your school's ACT Aspire results." AL.com. 2017).

Any child qualified under the laws of Alabama for admission to a public school will be qualified for admission into the proposed school. Although the exact location of the school has not yet been determined, the school will be likely located within a 10-mile radius of state capitol. The Board feels that the majority of the students will be located within a 10-mile radius of the school pulling students from neighboring schools. As a result, the proposed school will reflect the demographics of the community it serves.

LEAD Academy will be the only school in Montgomery County to offer a comprehensive college preparatory program emphasizing PBL STEM plus Reading, Arts and SEL. The

proposed school will strive to play a significant role in satisfying this need. LEAD Academy will be a driving force for STREAMS among low-income, minority and underserved populations.

### Education Plan/School Design

Provide an overview of the education program of the proposed school, including major instructional methods, assessment strategies, and non-negotiables of the school model. Describe evidence that demonstrates the school model will be successful in improving academic achievement for the targeted student population. Summarize what the proposed school is projected to do more effectively than the schools that are now serving the targeted population and how the school plans to achieve its goals.

LEAD Academy will promote and foster a positive culture and climate focused on improved outcomes for all students. The proposed school will actively communicate and collaborate with stakeholders and identify innovative ways to build school capacity to better meet the needs of students and families in need. The organizational structures and systems at the school will be setup to maximize the cycle of continuous improvement efforts. The school will use an early warning system indicator to identify the patterns of students that are off-track and access resources at the school to re-engage those students. The school will establish a culture of achievement that includes high expectations and expressly articulates college & career readiness as a goal for all students. The school will use effective instructional strategies rooted in research to increase student achievement across the core curriculum.

We believe that all children are curious. Children learn to use all the five senses to discover the world around them. Such a multisensory experience can help them to understand and retain information more effectively. We believe that project based learning (PBL) will help students to use this approach and it will facilitate better cognitive connection to understand difficult concepts (#04). Thus, innovative and advanced PBL will be an essential component of our STREAMS<sup>360</sup> program.

#### ***Project-Based Learning: Integrating it with the Innovative STREAMS<sup>360</sup>***

The project-based learning methodology will further help us engage students in active learning processes and enable teachers to observe and assess areas of students' strengths and struggles. Project-based learning has been proven to facilitate deeper conceptual understanding of academic content through hands-on activities. For many students, gaps in their conceptual understanding hinders their process of internalizing and generalizing information. A theme-based curriculum and project-based learning technique will contextualize academic content through active engagement of students in learning and allow them to connect the information to their experiences. Project-based learning will deepen their knowledge. It will help them to understand the relevance of their school-based learning in various aspects of their lives and the world around them. Teachers will receive training and guidance for understanding and implementing this approach in

different ways so that all students can reach a high level of academic success.

Our proposed STREAMS<sup>360</sup>PBL will fortify foundational skills of students and make them ready to face academic challenges at the high school and college levels. Practical application of knowledge will be encouraged so that students can get an idea as to what their professional lives are going to be like. Researchers at Texas A&M (#05) indicate that PBL provides contextualized, authentic experiences necessary for students to scaffold learning and build meaningful and powerful STEM concepts supported by Language Arts, Social Studies, and Fine Arts. Integrating interdisciplinary STREAMS<sup>360</sup> and PBL;

a) will eliminate curriculum fragmentation; learning will be more meaningful and students will be able to bridge concepts

b) It will allow appropriate development with a modified curriculum

c) It will lead to curriculum flexibility so that the teacher can meet the needs of diverse learners (#06).

### ***Arts Education***

Research shows that Arts subjects lead to cognitive and motivational enhancements in learning. These courses allow students with strong, nonverbal skills of learning to engage in activities that may be better aligned with their interests and abilities, offering them the opportunity to express themselves better and feel confident among their peers (#07).

Based on Howard Gardner's Multiple Intelligence Theory and a study of various Arts-integrated programs for at-risk students, our Arts course will offer inclusive learning opportunities for different types of learners. One study showed that through the use of the arts, low-performing students who were previously withdrawn or disruptive became active and productive class members (#08). "Learning in the arts is interesting and meaningful, promotes higher levels of engagement, raises students' intrinsic standards and motivates students to invest energy that learning requires of them" (#09). These observations prove that Arts can be used as learning tools because their symbolic quality helps in understanding without words- Arts are "motivators;" they "capture children's excitement, interests, and passions;" and "they build self-worth, confidence, and self-esteem" (#10).

### ***Continuous Improvement: As an innovative approach***

In our mission, we emphasized continuous improvement of student achievement standards. To equip our students with 21st century skills, we need to reorient our school system. Therefore, we propose to implement a research-based continuous improvement model (also known as Deming Cycle). It is unanimously agreed that improving the K-12 education system is a priority, especially in the low income-earning urban areas. Our focus will be on outcomes, such as reducing drop-out rates, improving college and career readiness and closing achievement gaps as well as the ways in which we can accomplish these outcomes. Continuous improvement is a new and promising approach that is being used in public education in many states such as Texas, California, and Kentucky to improve outcomes. Research has shown that such an approach has already proven successful in fields such as healthcare, manufacturing, and technology (#11).

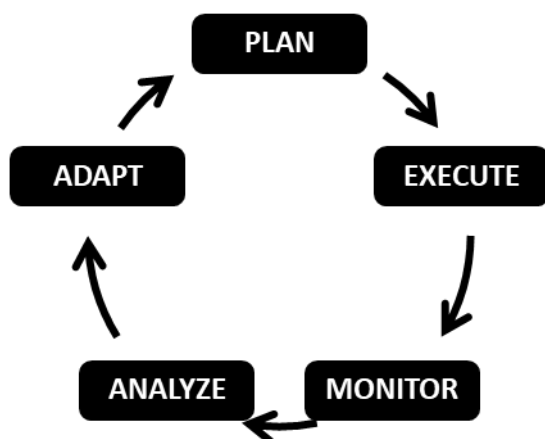
The "continuous improvement" is a problem solving process that embodies ongoing efforts to improve outcomes (#12). In this approach, change occurs both quickly and

incrementally, as organizations learn from experience while testing and refining strategies to produce better results (#12).

The continuous improvement model has the following 5 stages (Figure#1)

The following 5 stages are in a circular mode and follow each other continually.

- 1) Plan: Create an action plan for the year and set achievable quarterly, monthly, weekly, and daily objectives.
- 2) Execute: Provide support and coaching to teachers to enable execution of the action plan.
- 3) Monitor: Continuously evaluate the status of the plan.
- 4) Analyze: Analyze current data and inform relevant authorities.
- 5) Adapt: Ask questions to check whether outcomes are satisfactory- How do we improve and how can we attain success in the future. We believe that no matter how high a student's test scores are in core subjects, the student still needs to improve in terms of thinking, analyzing, learning, and writing skills.



### ***Social Emotional Learning: An innovative integration***

The Board of directors believe that students need a supportive and socially nurturing educational environment that promotes high levels of engagement through active learning experiences. The proposed school program will promote high levels of literacy and academic achievement through a multifaceted view of students' educational requirements. We believe that, in addition to a rigorous educational program, the foundation for students' future success depends on their developmental, social and emotional growth in a positive learning environment. Research conducted on the social-cognitive theory of learning demonstrates that a student's self-efficacy influences his or her academic achievement (#13).

The Board of Directors will coordinate with the Chicago based nonprofit, Collaborative for Academic Social and Emotional Learning (CASEL), to integrate Social Emotional Learning (SEL) with STREAMS<sup>360</sup>. The SEL is a systematic, evidence-based approach to teach students how to achieve goals, understand and manage emotions, build empathy, forge relationships, and make responsible decisions (#14). According to a 2011 analysis of 213

studies involving more than 270,000 students who participated in evidence-based SEL programs, there was an 11 percentile-point gain in academic achievement compared to students who did not participate in SEL programs (#15). The same comparative study also indicated that students participating in SEL programs showed improved classroom behavior, an increased ability to manage stress and depression, and better attitudes about themselves, others, and school (#16). According to a 2015 report by the American Enterprise Institute and the Brookings Institution, SEL competencies are critically important for the long-term success of all the students in today's economy (#16).

All staff will use the data to drive instructional decisions. Teachers use data from state assessments, pre and post assessments in order to make decisions regarding instruction. The teachers will reflect on instruction daily to determine effectiveness. Instruction is aligned to the essential skills to ensure proficiency.

### **Community Engagement**

**Describe the relationships that have been established to generate community engagement in and support for the proposed school and how needs and/or solicited support for the school have been assessed. Briefly describe these activities and summarize the results.**

Members of the LEF held several town hall meetings, and we have met with families in various neighborhoods. We have setup booths at local parks and a local Doctor's office. We have gathered over 200 signatures of support from the community. We have also included letters of support from various community member including but not limited to state representatives, business and community organizations, and city council members. The School will be located in Montgomery County. We plan to serve all students, regardless of race, gender, national origin, religion or any other status.

As of the date of this application, the exact location of the proposed school has not been determined. Because of this, it was difficult for the board of directors to focus on an area to mobilize parents for the proposed school. Based on public school enrollment and student population density, we are confident that we will reach our enrollment capacity starting at year one. We will locate our building in an area where there is a clear demand for a high quality charter school to serve underserved student populations.

Meantime, the board members understand that effective outreach and community engagement efforts are critical for the development of a successful school. We believe that the survival of the school depends on engaging the community in a meaningful way. Upon approval, the board members will oversee the creation of a variety of advertisement techniques and preparation of materials for promoting the school. These include (but are not limited to):

- One-pager describing the school

- Brochures
- Post cards
- Website
- Poster and banners

Printed and electronic versions of these materials will facilitate ease of use and consistency of message across all media. Additionally, the school will utilize bulletin boards, media, mailings, and workshops at proposed school location and other public institutions, throughout the identified neighborhood. The process will also include outreach to parents, teachers, pediatricians, counselors, social service agencies, and other youth advocates.

Families will be made aware of the opportunity to enroll their children in our proposed school of choice. We will conduct open house meetings at different dates and times so that interested parents will be able to attend school information sessions. They will be able to meet with board members and school staff to learn our philosophy, mission, curriculum, and application procedures.

The following activities will also be conducted by the board members and school staff:

- Post notices in the local libraries, stores, public places, doctors' and dentists' offices, and all locations frequented by the parents of prospective students.
- Issue press releases in local publications.
- Attend and speak at local community meetings, PTA meetings,
- Conduct multiple open houses.
- Visit all elementary and middle schools in the area.
- Post notices in local radio programs as public service announcements.
- Visit and speak with all religious organizations.
- Mail or deliver flyers with information to community based organizations,
- Post notices in condominiums, apartment buildings, public housing (housing projects), day care centers, Head Start programs, etc.
- Recruit volunteers to distribute information door-to-door.

We hope to eliminate barriers for our parents by conducting open house meetings on different dates and at convenient times. We will also start early and keep the enrollment window open long enough to inform the local community.

### **Leadership and Governance**

As an attachment, list the members of the school's proposed leadership team and governing board, including their roles with the school, their current job titles and employers, and full resumes (including contact information and professional biographies for each individual listed).

The proposed school will be governed by the LEAD Education Foundation. The LEF members consist of highly qualified, degreed and experienced educators and community stakeholders who support the school's mission and embrace a shared vision for LEAD Academy. The team will consist of proven and successful thought leaders that have a longstanding reputation as advocates for children and learning. Currently, there are four founding board members;

1. Charlotte Meadows
2. Ryan K. Cantrell
3. Lori White
4. William Green

***Charlotte Meadows*** has been an education advocate for the past fifteen years with a single passion – to improve education in Montgomery, Alabama so every student will receive the opportunity to get the best education possible. Her experiences on the Montgomery Board of Education has led her to her tireless work on behalf of students in the area. She has always believed that there are enough people who care in the community that the problems in the schools can be fixed, albeit with hard work. Charlotte was able to work with lawmakers and the Legislative Reference Service to write legislation to reform Alabama's tenure laws. Although the specific legislation did not pass, the networking and knowledge she gained was invaluable, as well as the research experience in reviewing laws from around the country.

***Ryan Cantrell*** received his Bachelor degree in Political Science in 2008 from Faulkner University, where he was also an All-Conference, All-Region golfer and President of the Student Government Association. After graduating college, Ryan went to work for the Alabama Republican Party, first as a Field Director for the Jay Love for Congress Campaign, then as Deputy Political Director, helping to accomplish the first Republican takeover of the State Legislature since Reconstruction. After leaving the ALGOP in 2011, he went to work for the newly elected President Pro Tempore of the Alabama State Senate, Del Marsh, where he served as Policy and Research Analyst. Ryan has been active in the education reform movement since 2013 when he started working for the American Federation for Children, a school choice advocacy organization that works to ensure that low- and middle-income families have the ability to choose the educational environment that works best for their children.

***William A. Green, Jr.*** is a former U.S. Marine. He graduated from Alabama State University in 1992 with a degree in Accounting. Immediately after graduation, he worked as a stockbroker in Atlanta. After leaving the investment banking industry, he continued his career in investment banking at SunTrust Bank in the mortgaged backed securities department where he designed an award winning computer system to process numerous securities cutting the amount of time to process mortgages from several days to a couple of hours. As a consultant supporting various Fortune 500 businesses and government entities, William analyzes financial statements and reconciles budgets on a daily business as part of his duties. The experiences acquired through the application of best practices across a wide range of industries in the public and private sector over his 20 plus years of experience makes him uniquely qualified to serve in his position as city councilman in

district 5 in the great city of Montgomery Alabama.

**Dr. Lori White** is an Internal Medicine physician who has been in Montgomery since 1994. She received her Doctor of Medicine degree from Emory University in 1988. As an Assistant Professor of Medicine, she is involved in teaching and supervising resident physicians during their training, as well as, medical students attending the UAB School of Medicine Montgomery Campus. She serves as the Curriculum Committee Chair, the Acting Internship Clerkship Director and the Inpatient Services Director as part of her position with UAB Montgomery. Dr. White has been an advocate for education for many years. In 2010, Lori ran for a position on the Montgomery County School Board. During this time, she reached a new understanding of the need for improved educational opportunities in Montgomery. Her passion to ensure a quality education for all the children in our community has not waivered.

**Please, see Exhibit-A for more detailed information.**

### Enrollment Summary.

Complete the following table, removing any rows for grades the school will not serve.

Grades	Number of Students					
	Year 1 2018-19	Year 2 2019-20	Year 3 2020-21	Year 4 2021-22	Year 5 2022-23	At Capacity 2024-25
<b>K</b>	96	96	96	96	96	96
<b>1</b>	72	96	96	96	96	96
<b>2</b>	48	72	96	96	96	96
<b>3</b>	48	48	72	96	96	96
<b>4</b>	48	48	48	72	96	96
<b>5</b>	48	48	48	48	72	96
<b>6</b>		96	96	96	96	96
<b>7</b>			96	96	96	96
<b>8</b>			0	96	96	96
<b>9</b>			48	48	96	96
<b>10</b>				48	48	96
<b>11</b>					48	96
<b>12</b>						96
<b>Total</b>	<b>360</b>	<b>504</b>	<b>696</b>	<b>888</b>	<b>1032</b>	<b>1248</b>



## **Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.**

We propose to establish a comprehensive college preparatory K-12 program in Montgomery. In our first year, we will start with all elementary school grades (K-5) with 360 students. We will serve 1,248 students at full capacity. Basis for this number is that we want to have a minimum 384 students at high school grades (9 through 12). In order to accomplish and support 384 students at high school and we must build a healthy student population at lower grades that can support this enrolment size. This size student population is large enough to offer a solid curriculum with many electives, AP and dual credit courses while being financially viable.

Please note that we will start middle school in our second year with only six grade level and incubate our middle school program in existing elementary school building. In our third year, we will lease or build another campus nearby to our existing elementary to establish our 6-12 program. We will have 6, 7, and 9 grade levels in this new facility and continue grow as it was outlined in above table. At full capacity, our goal is to have two separate building preferably on same campus to serve 1248 students in grades K though 12. This growth model is critical to the LEF board members because it allows the administrators and teachers on each building to carefully create and support the school culture and our core values of high expectations, integrity, dedication, respect, and teamwork. We believe that the successful execution of this structure will allow us to sustain this model in Montgomery.

## **References**

- #01= Retrieved from OECD Website (<https://www.oecd.org/unitedstates/PISA-2012-results-US.pdf>)
- #02= Retrieved from Barbara Bush Houston Literacy Foundation (<https://www.bushhoustonliteracy.org>)
- #03= Retrieved from CASEL (<https://www.casel.org>)
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## SECTION 1. Educational Program Design & Capacity

### EDUCATION PROGRAM OVERVIEW

**Summarize the education program, including primary instructional methods and assessment strategies, and any non-negotiable elements of the school model. Briefly describe the research-based evidence that has demonstrated success for this education program with the anticipated student population.**

The Board of Directors of the LEAD Education Foundation believe that each child has a natural inquisitiveness and love of learning and each child has a unique intelligence, level of proficiency, and learning style. Education in LEAD Academy will help students cultivate their essential skills and ethical values and learn how to meet their potential. LEAD Academy also embraces the goals, objectives, and content in all subject areas and grade levels which have been established by Alabama Department of Education. LEAD Academy place strong emphasis on STREAMS education (Science, Technology, Reading, Engineering, Arts, Mathematics, and Social Emotional Learning); therefore, several programs will be incorporated into the mainstream curriculum to promote STREAMS education among the underserved populations. Advanced Placement Program, Project Based Learning, State Dual Credit Program, Robotics, Engineering, Project Lead the Way, and other programs will also be integrated into the campus programs to provide graduation pathways and career opportunities for LEAD Academy students.

The educational program emphasizes the core subjects (Math, Reading/ELA, Science, Social Studies) and Engineering and Technology as part of the STEM efforts in K-12. Students will be given intense and extended instruction especially in Math and ELA/Reading. In terms of curriculum support and extra-curricular programs, the non-negotiables of the education model include but are not limited to:

***University Collaboration Program:*** To create a college going culture, trips to universities for all students are essentials. During these trips, students interact with academicians, graduate students and participate in academic and non-academic activities. Additionally, students visit laboratories, and learn about college life.

***After-School Program (extended days and weeks):*** LEAD Academy believe that after-school programs and Saturday schools are essential for students' success. Identified low achieving/struggling students are required to receive additional tutorials in small groups.

For advanced students, extracurricular activities are design to satisfy their needs. Many club activities and the sports are also offered for students to attend.

**Lectures by Professionals:** Professors and doctoral students from the area universities and professionals from local companies are invited to support our curriculum by giving lectures to students in class or to teachers on staff development days. A list of people who want to contribute to our school their areas of expertise is given to teachers, who arrange the schedule of these professionals according to the course schedule.

**Field Trips:** In addition to classroom instruction, regular field trips to academic resources in and around the city, such as museums, art galleries, science centers, are planned every year to support our curriculum in science, history, art, and technology.

**Community Service:** Students must complete 100 hours of community service as part of the high school graduation requirement; or average of 25 hours per high school year. Students learn to appreciate volunteerism and the importance of the community.

**School Project Fair:** Through the School Project Fair, seniors present their projects to the community and the school as part of their high school graduation requirement. Parents, surrounding communities, and professionals from colleges and companies are invited to this annual event. Students are provided the opportunity to practice their public speaking and presentation skills.

**Peer-tutoring and Mentorship Programs:** Successful students are encouraged to be peer tutors for their friends and mentors for the younger students (with their parents' consent). Students contribute to the success of the school and their friends through these programs.

**Role Model Initiative:** Through this program, LEAD Academy bring a distinguished member of the community to school every month for a speech and create a platform for that person to interact with students.

**Student Clubs:** Student clubs (such as the drama club, math club, science club, chess club, photo/film/art club, dance team, school newspaper and magazine team, yearbook team, and debate team) are encouraged and supported by LEAD Academy. The school asks our faculty members to donate at least one hour a week to support student club activities, and for parents to also donate time. Students learn to work together, take responsibility in a team environment, and compete with other schools as real-world experience. Seventh and eighth grade students are required to participate at least in one club activity.

**Student Recognition:** Students who demonstrate good citizenship are recognized with awards and prizes. Good citizenship includes strong work skills and ethics, leadership, and good behavior, such as being respectful to others and others' opinions. Students are recognized with awards and prizes for their participation in the mentorship program, community service, student clubs, and athletic program.

**Science Fair Projects and Science Demonstrations by Students:** LEAD Academy Science

curriculum incorporates project-based learning at multiple levels. It requires students to perform self-initiated research using scientific inquiry and experimentation. Through these techniques students are required to produce a science fair project, participate with a science Olympiad team, or prepare a demonstration related to a scientific knowledge. Students who are willing to pursue science fair projects may also participate at regional, state, national, and international levels to compete with other projects. To produce more advanced projects students are also encouraged attending research groups at local universities and labs. Students may also opt-in to prepare a demonstration of a scientific knowledge in the areas of physics, chemistry, biology, or math. These demonstrations are prepared solely by student efforts and are all designed to teach and enrich scientific knowledge through hands-on experience. Students prepare present a 5 to 10-minute video of the demonstration and make a presentation of the subject to their own classroom and other classrooms.

***Tutorial in all grade levels:*** The main goal of the program is the academic improvement that yields positive outcomes in reducing dropout rates. Tutoring is offered to students after school and on Saturdays. Students who identified for placement in after-school tutoring are required to attend; Saturday tutoring is invitation-based. LEAD Academy Tutoring program is offered free of charge to students to increase students' attendance. LEAD Academy Tutoring Program aims to achieve the following:

- Increase students' mastery of academic skills.
- Improve students' self-esteem and self-confidence.
- Improve students' attitudes toward school: reduces dropout rates, trancies, and tardiness.
- Help students break down social barriers and create new friendships.

Students enrolled for the tutoring program receive the following:

- Individual instruction—lessons are tailored to individual students' learning styles and levels of understanding.
- Instruction free of competition—students' progress at their own pace.
- Private instruction, apart from whole class instruction.
- Increased praise, feedback, and encouragement beyond what they might receive from one teacher.
- Closer monitoring (from the teacher and tutor) that maximizes time on task.
- Skills demonstrated instead of just verbalized.

***Advanced Placement Programs:*** LEAD Academy high school campuses offer several Advanced Placement (AP) courses in addition to the regular course curricula. Students choosing these AP courses are expected to commit to study regularly, attend review sessions arranged by the AP Teacher and the College Counseling Team, and take the end-of-year AP exam to become eligible to earn credit for the designated subject area. Students are welcome to enroll in AP courses; however, eligibility depends on the student's former performance, teacher recommendation, and completeness of the summer AP assignments. A core set of AP courses in LEAD Academy campuses will include AP Biology, AP Chemistry, AP Physics B, AP Calculus, AP Human Geography, AP World History, AP US History, AP Spanish Language, AP English Language, AP English Literature, AP Computer

Science A, and AP Art History. Other AP courses may be available based on the campus resources and student interest. Teacher selection and hiring is also affected by the need for AP courses at campuses. Teachers are required to attend Summer AP Workshop programs at universities to earn experience and professional development towards their corresponding AP course.

### **Ongoing assessment**

- LEAD Academy's ongoing assessment system that includes NWEA MAP, Benchmark assessments closely monitors the academic progress of students.
- LEAD Academy teachers are given flexibility in teaching and are not constrained by the testing focus.
- The mandatory use of the technology-enabled student database by teachers allows for information to be consistently updated.

### **Progress Screening Tests**

LEAD Academy students at grades K-12 will take tests called Measures of Academic Progress (MAP®). We give students MAP tests to determine students' instructional level and to measure academic growth throughout the school year, and from year to year in the areas of English Language Arts and Reading, Mathematics, and Science. Students will take the tests on a computer.

MAP tests are unique in that they adapt to be appropriate for student's level of learning. As a result, each student has the same opportunity to succeed and maintain a positive attitude toward testing. And with MAP tests, we can administer shorter tests and use less class time while still receiving detailed, accurate information about your child's growth.

We are truly focused on every child's individual growth and achievement. Partnering to help all kids learn, parents and teachers can have a profound positive effect on the lives of our children. MAP assessments will be based on the learning path for each student to be developed to progress. Teachers will create personalized learning path in English Language arts and Reading, and Mathematics. Students will focus on the objectives that they have not mastered yet.

**MAP Reading:** Students will be given *NWEA Map Test* to determine their current reading level. This assessment will provide information on students' over all reading ability and suggest a range of book levels for each student. Teachers then will meet with each student to set individualized reading practice goals using *Compass Learning Accelerated Reading (AR)* program, where students read books in their reading levels and take quizzes. AR provides teachers with immediate information on students' performance on the quizzes and helps them monitor reading level and comprehension skills of each student. If the students' performances are below their grade level, the teachers start implementing RTI process.

**MAP Math:** Students will take NWEA Map test three times in a year to see their progress in Mathematics. The MAP testing data will verify the students' true achievement level. LEAD Academy will use Assessment and Learning in Knowledge Spaces (ALEKS) to meet the

needs of each student based on MAP data. ALEKS is a Web-based, artificially intelligent assessment and learning system. ALEKS uses adaptive questioning to quickly and accurately determine exactly what a student knows and doesn't know in a course.

**Benchmarks:** Every grading period, students will be given benchmarks as a formative assessment. Based on the students' scores in these tests, teachers will plan their instruction and interventions.

## Curriculum and Instructional Design

**Propose a framework for instructional design that both reflects the needs of the anticipated population and ensures all students will meet or exceed applicable standards of academic proficiency.**

**1. Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.**

Our goal at LEAD Academy is to provide ample opportunities for active, engaging, project-based learning opportunities, within a developmentally appropriate educational program that prepares students to be lifelong learners. A strong basis in literacy is one of the ways we will invest in our students' future academic success.

LEAD Academy's primary focus is to improve student learning through continuous improvement of the educational programs. The design of the daily, quarterly and yearly schedule is to show our intent and purpose. Our daily schedule is a reflection of our mission statement. The daily schedule has been purposefully planned based on the needs of the foreseen student groups and research-based best practices. It is important for students to have a predictable and consistent daily schedule so that they are more organized, efficient, and productive.

Many of our students will come from low socioeconomic backgrounds. A majority of our students will be part of the Free/Reduced Breakfast and lunch program. Also, these are working families and we want to accommodate students' basic needs such as food, shelter plus social and emotional support. LEAD Academy will open its doors at 7:15am every day. Breakfast will be provided to students as early as 7:15am. Students who do not need breakfast will have access to the reading materials. During the day, students will have time to have a recess period that will give them an opportunity for a physical outlet. Recess will also support them for their brain development, academic progress and increase expected communication skills among peers.

Multi-tier interventions, Professional Learning Communities, and department meetings will be among the most important considerations while creating the optimum schedule. Teachers will have an opportunity for common planning periods. Course offerings at elementary, middle, and high school levels can be differentiated due to students' need.

The total academic year will consist of 180 instructional days. There will be 7 professional development days before the school year starts and 5 days for professional development during the school year. Teachers will have a 45-minute planning time and a 30-minute duty free lunch period daily.

Parents will receive progress reports in the middle of each quarter. Report cards will be sent to parents at the end of each quarter with an acknowledgment section that will be signed and returned to the school.

After the first and third report cards, teachers will have Parent/Teacher/Student goal setting and academic progress monitoring conferences. Parents will be asked to sign up for these meetings according to their availability.

<b>Daily Schedule</b>	
<b>Time</b>	<b>Activity</b>
<b>7:15</b>	School opens doors
<b>7:15-7:40</b>	Breakfast
<b>7:40</b>	Daily announcements, Pledge of Allegiance
<b>7:45</b>	First period starts
<b>7:45-8:15</b>	Blended learning, ELA & Math Multi-tiered Interventions-PBL activities
<b>8:18-9:03</b>	Mathematics
<b>9:06-9:51</b>	Language Arts (English)
<b>9:54-10:39</b>	Art/Music
<b>10:42-11:12</b>	Lunch
<b>11:12-11:30</b>	Recess
<b>11:30-12:15</b>	Social Studies
<b>12:18-1:03</b>	STEM/Computer/Coding
<b>1:06-1:51</b>	Science
<b>1:54-2:39</b>	Physical Education/Health
<b>2:42-3:10</b>	Character Education with Social Emotional Components
<b>3:10</b>	Dismissal starts
<b>3:10-4:00</b>	Clubs, After school programs, Community based events, Tutorials

The lack of consideration for developmentally sound literacy instruction, in prerequisite skills in comprehension and higher-level cognitive processes, leaves holes in students' educational experiences, denying them access to further academic advancement. The high rates of illiteracy in Montgomery, demonstrate that the education system is failing large numbers of students. The unacceptable rates of illiteracy and school failure experienced by children affected by poverty and those with special needs have serious

consequences for their academic achievement in school and for their lives. The LEAD Academy aims to address literacy as a top priority in our curriculum and instruction from kindergarten to twelfth grade. Through our literacy program, students will learn phonemic awareness, receive whole-language instruction, and gain comprehension skills that help them become good readers and access the academic curriculum.

The major components of our literacy plan are:

- Integration of English Language Arts Alabama State Standards and into the curriculum
- Engaging curriculum materials and resources
- Small-group instruction based on students' actual reading and developmental levels, rather than grade level
- A combination of phonics, whole language, and comprehension activities
- Interactive and guided reading instruction, as well as opportunities for independent reading
- Arts-integrated reading activities that incorporate drama and visual arts
- Two literacy blocks each day for students from Kindergarten through eighth grade, including reading applications to other subject areas

We will provide students with personalized learning experiences by organizing them into small learning communities. In these learning communities, students engage with a team of core content teachers and learning coaches. This team works together to ensure that students realize short and long-term goals, thus fulfilling their academic plan. Each student's progress will be tracked and regularly benchmarked against the Alabama College- & Career -Ready Standards (ACCRS). The Instructional model provides opportunities for students to master core academic content aligned with Alabama standards, think critically and solve complex problems, work collaboratively, communicate effectively and learn how to learn. The student to teacher ratios may vary at different grade level but the overall student teacher ratio will be around 1:20. Students engage daily in high levels of rigor and relevance, through a collaborative and personalized learning experience.

**2. Provide an overview of the planned curriculum, including, as an attachment (Attachment 1), a sample course scope and sequence for one subject for each division (elementary, middle, high school) the school would serve. In an attachment (Attachment 2) explain the school's curriculum; its correlation to the Alabama standards; the specific instructional materials to be used to implement the curriculum; and the process your school will follow to evaluate, review, and revise its curriculum on an annual basis.**



LEAD Academy will build a powerful program that will have a college-preparatory focus. At LEAD Academy will design a personalized learning environment for students to have deep learning, responsive, targeted instruction that will prepare them for college and career ready. To accomplish this, LEAD Academy will implement the following three new key strategies:

1. Implement a cross-disciplinary, multi-sensory, technology-enabled blended curriculum that integrates standards-based learning and project-based learning (PBL)
2. Institute a “LEAD hours” schedule whereby students receive 2 hours a day of targeted instruction on three LEAD levels: receive remediation and extra support in math and English Language Arts; choose math or ELA enrichment; or pursue electives in areas of interest;
3. Data systems and dashboards to provide real-time data to inform the first two strategies and to support students in setting goals and creating personal learning plans.

***Blending standards-based and project-based learning:*** The LEAD Academy educational model addresses the need we identified for our students to engage even more deeply with content in core subjects. Highlighting the STREAMS areas, we believe that instituting a cross-disciplinary multi-sensory approach will lead to higher levels of student engagement in core subjects through students being able to determine the focus of their intellectual exploration and the specifics of their products based on their own unique interests. The student-driven projects will align to CCSS and require students to go deep into the content and apply their knowledge using higher-order skills such as analysis and interpretation as they engage in the complex tasks and performance assessments that will be required in this project.

Integrating the projects with social studies and ELA components will help students to understand the relationship between science and society and culture now and throughout history. As an example, in a prior STEM project, a student produced demonstrations that explained sound waves and their relationship to each other. This science topic presents an opportunity to explore the relationship between “keys” and sound in general. The student could investigate the impact of sound on a symphony, historical music, or architecture. She could use what she has learned about sound to explain why a symphony hall looks the way it does. She could even use an example of the qualities of resonance to investigate how and why certain violins are more desirable to professionals than others. Social Studies topics that could be explored through this investigation include: Architecture, Music History, inventors of music instruments, and impact of famous musicians such as John Phillips Susa, and Jim Europe. Students will work with their ELA teachers to develop essays or other genres of writing related to their projects. The student could write an essay about how technological advances in the physical qualities of sound have affected music history.

***LEAD Hours:*** LEAD hours addresses the need for more differentiation to accelerate the learning of all students in math and English language arts. LEAD Academy currently offers intervention support as well as enrichment after school and on Saturdays. This initiative

will strengthen the approaches we are currently using after school and expand access to all students by integrating these programs into the school day. Depending on an individual student's needs, two hours a day will be available for intervention, enrichment, or elective courses. These classes will utilize a variety of instructional approaches to support competency-based progress through an individualized learning plan at a pace specific to each student's needs and abilities.

***Data systems and dashboards:*** To support the goals we have set, all stakeholders will need robust data to ensure each student is receiving relevant and timely feedback they will need to make progress toward their goals, and to monitor system-wide progress toward goals. Stakeholders will need access to a variety of data about students, including real-time data and information on students' learning styles and preferences, as well as social-emotional information that may have an impact on an individual's learning. Data systems, with dashboards customized to each end user, will support students, teachers, and parents to provide personalized content to meet the needs of all students.

## **Attachment-1**

## **Attachment-2**

### **3. Describe the primary instructional strategies that the school will expect educators to use and why they are well suited for the anticipated student population. Describe the methods and systems that educators will utilize to provide differentiated instruction to meet the needs of all students.**

Students will be provided with opportunities to expand their mental and physical abilities in socially acceptable activities. Students and teachers will be considered as partners in the students' educational program, where there will be mutual respect and support. We believe that addressing students' successes and setbacks are equally important for the students' growth. Because thought and expression develop out of experience, learning should nurture a sense of caring for other people and the environment.

The School's primary instructional method is a blended model of asynchronous and synchronous instruction that takes into account the instructional and social/emotional needs of at-risk students. The instructional model focuses on organizing and structuring the school for success where teachers and staff work collaboratively to design rigorous learning experiences for every student. Student learning experiences reflect a focus on foundational, collaborative, personalized and conceptual learning experiences. Students engage daily in high levels of rigor and relevance, through collaborative and personalized learning experiences. Students take part in daily custom learning time (LEAD Hours) where they receive additional interventions, skill support, tutoring and acceleration and enrichment at their level of learning. We believe in providing students with personalized learning experiences by organizing our students into small learning communities. In these learning communities, students work closely with a team of core content teachers and their learning coach, who together ensure that students set short and long-term goals so that

they can fulfill goals. The Instructional program will provide opportunities for students to master core academic content, think critically and solve complex problems, work collaboratively, communicate effectively and learn how to learn.

The following list is examples of teaching methods that will be utilized by the instructional staff throughout the proposed school at appropriate grade levels:

**The thematic approach** will be used as the basis for planning a five-or six-week academic term. The theme topic will be driven by student interest and group consensus. Once a theme topic is chosen, a variety of core activities across the curriculum will be brainstormed by group members. Students will then examine these activities and choose several to complete, based on time constraints, group and individual interest, availability of community resources, and general compatibility with the school program. The group will then set a schedule of completion with input from program, education, and other support staff.

**Cooperative learning** will be integral and essential to all learning experiences. Success will be measured at the group level as well as the individual level. Group work and portfolio work will be an essential part of the therapy that will take place in the program, so it will become a natural part of instructional opportunities as well.

**Goal-setting** will be another strategy that bridges academic and therapeutic boundaries. Students will be expected to write long-term and short-term goals for every aspect of their life. Educational goals will be evaluated for every activity throughout the day. Goals will be expected to be realistic, reliable, and measurable.

**Individualized instruction** will be one of the most important instructional strategies of LEAD Academy, which will be provided to students at all times as needed. It will be accommodated in group settings because of the favorable student/teacher ratio. Each student's education plan will be individualized according to his or her education, emotional, and psychological needs.

By using a **multi-sensory** approach to learning, students will be provided opportunities to learn through auditory, visual, tactile, and kinesthetic activities. Students will be guided through the process of determining which learning style is best suited to their needs.

In **Role modeling**, teachers will actively participate in the daily routine and educational process of the group. The power of role modeling is especially important in demonstrating a respect for others and the environment.

**Modular Instruction;** A learner-centered and self-directed learning experience will be designed for individuals or for small teams in the school. Learning teams will be randomly assigned so cooperation will be required of students who may be from diverse backgrounds or groups.

**Simulation** is a learning process that involves students as participants in role-playing

presentations and/or problem-solving games imitating real-life situations or workplace environments will be used as instructional strategies.

**Demonstrations;** Showing practical applications of theory, product, or equipment; will be done by teacher, guest, and/or students.

There are many forms of **Multiple Intelligence**; many ways by which we know, understand, and learn about the world. Seven intelligences have been identified: verbal/linguistic, logical/mathematical, visual/spatial, body/kinesthetic, musical/rhythmic, interpersonal, and interpersonal. Instructional staff will use the following areas to challenge the students' various intelligences.

- **Visual/Spatial:** charts, graphs, photography, visual awareness, organizers, visual metaphors, visual analogies, visual puzzles, 3D experiences, painting, illustrations, story maps, visualizing, sketching, patterning, mind maps, color, and symbols.
- **Verbal/Linguistic:** stories, retelling, journals, process writing, reader's theatre, storytelling, choral speaking, rehearsed reading, book making, speaking, nonfiction reading, research, speeches, presentations, listening, reading, reading aloud, and drama.
- **Bodily Kinesthetic:** field trips, activities, creative movement, hands on experiments, body language, manipulative, physical education activities, crafts, and drama.
- **Logical/Mathematical:** problem solving, tangrams, coding, geometry, measuring, classifying, predicting, logic games, data collecting, attributes, experimenting, puzzles, manipulative, scientific model, money, time, sequencing, and critical thinking.
- **Musical/Rhythmic:** singing, humming, rhythms, rap, background music, music appreciation, mood music, patterns, form, rhythm, and playing instruments.
- **Intrapersonal:** individual study, personal goal setting, individual projects, journal log keeping, personal response, personal choice, individualized reading, and self-esteem activities.
- **Interpersonal:** co-operative learning, sharing, group work, peer teaching, social awareness, conflict mediation, discussion, peer editing, cross age tutoring, social gathering, study groups, clubs, and brainstorming.

## Student Performance Standards

**Responses to the following items regarding the proposed school's student performance standards must be consistent with applicable state and authorizer standards**

### **1. Describe the student performance standards for the school as a whole.**

Our philosophy of continuous improvement requires us to plan, execute (do), monitor (check), and adopt (adjust) so that our beliefs are put in action. We link all decisions and all results to students' success. Thus, the goals for teachers, administrators, staff members,

and the governing board will link directly to our students' performance goals. Additionally, LEAD Academy will ensure all of the organization's goals are associated to the goals we set for our students.

LEAD Academy will continuously review the students' data to improve student outcome. The ultimate goal is to exceed local and state standards. We will first ensure that students are meeting the grade level expectations detailed in the Alabama College & Career Readiness Standards (ACCRS); students will meet these performance goals set forth by the Alabama State Department of Education. Additionally, our students will meet these standards and eventually, will surpass them. Additionally, LEAD Academy will achieve the following specific goals;

**Goal 1:** LEAD Academy students will Meet or Exceed Proficiency (Level III + IV) in ELA The ACT Aspire or comparable test.

**Metrics:**

- Grade K-8: At least 30 percent more of all students will meet or exceed proficiency in the area of ELA than among their counterparts in the Montgomery County.
- Grades K-8: Students with disabilities will meet or exceed proficiency in ELA compared to their counterparts in the Montgomery County.

**Goal 2:** LEAD Academy students will Achieve Mastery in The Area of Math to Meet or Exceed Proficiency (Level III + IV) on ACT Aspire/or other test and ACT Quality Core End-of-Course Assessments.

**Metrics:**

- Grades K-8: At least 20 percent more of all students will meet or exceed proficiency in Math than among their counterparts in Montgomery County.
- Grades K-8: Students with disabilities will meet or exceed proficiency in Math compared to their counterparts in the Montgomery County.
- Algebra I EOC: At least 20 percent more of all scholars will meet or exceed proficiency in the area of Algebra I than among their counterparts in Montgomery County.

**Goal 3:** LEAD Academy students will Achieve Mastery of Skills in the Area of Science to Meet or Exceed Proficiency (Level III + IV) on ACT Aspire.

**Metrics:**

- Grades 5 & 7: at least 30 percent more of all scholars will meet or exceed proficiency in Science than among their counterparts in Montgomery County.

**Goal 4:** LEAD Academy students will show growth in their academic performance as measured by NWEA- MAP.

**Metrics:**

- Grades K-8: NWEA-MAP results will show gain from year to year.

**Goal 5:** LEAD Academy students will participate in a project to demonstrate their understanding of scientific process.

**Metrics:**

- Grades 3-8: By the end of 3rd year, 50% of students will complete at least one science project.
- Grades 3-12: By the end of 5th year, 75% of students will complete at least one science project.

**Goal 6:** LEAD Academy students will have higher daily attendance average than Montgomery County Schools.

**Metrics:**

- Grade K-12: Each year, the school will maintain a daily attendance average rate higher than the average at local counterpart schools.

**Goal 7:** LEAD Academy students will participate in extra-curricular and volunteer activities.

**Metrics:**

- Grade 3-12: By the end of third year 50% or students will participate in at least one after school club.
- Grades 9-12: Students will complete at least 100-hour community volunteer hours to graduate.

**Goal 8:** Annual audits of the school will result in an unqualified opinion and no major findings.

**Metrics:**

- Upon completion of the school's second year of operation and every year thereafter, the financial audit will result in an unqualified opinion and no major findings.

**Goal 9:** Each year, the school will operate on a balanced budget (i.e., revenues equal or exceed expenditures) and maintain a stable cash flow.

**Metrics:**

- LEAD Academy's monthly financial statements will reveal sound and balanced budget.

LEAD Academy will use the Alabama College and Career Ready Standards for Grades 9-12. The Alabama State Board of Education approves these standards. All teachers will use State of Alabama Courses of Study to develop and deliver all courses. All of the curriculum will be aligned to Alabama College and Career Ready Standards. The use of the Alabama College and Career Standards will ensure students are prepared to perform well on the ACT as a part of Alabama's testing and accountability system.

- 2. Provide, in an attachment (Attachment 3), a complete set of the school's proposed learning standards for each grade the school will serve. Address the skills and knowledge each student will be expected to attain by the end of each grade. Approved schools will be required to submit a full set of learning standards for all**

## **grades in the school before opening.**

LEAD Academy will use the Alabama CCRS and the ACT College Readiness Benchmark Standards for each designated grade level and content area. Based on the state's course of study, many of the standards solely show progressive mastery based on age and grade relevance. LEAD Academy expects all students to possess the key skills at every grade level and at the age appropriate level.

LEAD Academy students are going to:

- Read, comprehend, analyze, evaluate, etc. grade appropriate texts
- Develop academic language and vocabularies
- Improve and express their thoughts, ideas, and arguments verbally and on paper and eventually in writing at an age proper or higher level in all subjects
- Understand and apply the foundational and complex ideas of in the areas of science, technology math, and social studies courses for problem-solving, critical-thinking
- Utilize technology as a tool for learning
- Utilize knowledge to apply it to real life applications
- Understand and demonstrate good leadership skills and character
- Develop growth mind-setting

The school will use the ACT Aspire performance level descriptors that align directly with the Alabama's testing and accountability system. The school recognizes the needs of each student as an individual and will use the ACT Aspire performance level descriptors in math, reading, and science as an accountability tool to ensure each student is performing at his/her greatest potential. Therefore, when each student has demonstrated proficiency in the ACT Aspire performance level descriptors it will be noted in students' academic plan with evidence of the student reaching proficient on each performance level descriptor. We have included the ACT Aspire performance level descriptors in Attachment 3. Source: ACT Aspire

## **Attachment-3**

- 3. If you plan to adopt or develop additional academic standards beyond the applicable state and authorizer standards, explain the types of standards (e.g., content areas, grade levels, and/or others). Describe the adoption or development process that has taken place or will take place. Select one grade level and subject area as an example and explain how these additional standards exceed applicable state and authorizer standards.**

LEAD Academy will use the Alabama state authorized academic standards. No additional academic standards have been developed by the school.

- 4. Explain the policies and standards for promoting students from one grade to the next. Discuss how and when promotion and graduation criteria will be communicated to parents and students.**

LEAD academy student placement and promotion will be aligned on the state's placement and promotion requirements. LEAD academy students will be promoted from one grade to another based on the student's mastery of the standards, specifically English Language Arts, mathematics, science, and social studies. The retention, placement promotion, and acceleration decisions will be made by the Campus Grade placement committee. Campus principal will be the ultimate person for the final decision.

Promotion and retention decisions regarding Special Education students will be done through IEP process. IEP committee will review the student's Individualized Educational Plans and will determine the appropriate decision.

According to Alabama Code, Section 16-28-4(b), a child must be "five years of age on or before September 1 or the date on which school begins in the enrolling district" in order to enroll in his/her local kindergarten. In grade Kindergarten promotion to the next grade level will be based on evidence of satisfactory performance in Reading, Language Arts and Mathematics.

According to Alabama Code, Section 16-28-4(a)) states that any "child who is under six years of age on September 1 or the date on which school begins in the enrolling district shall not be entitled to admission to the first grade" during that school year. Although, the student may be admitted, "regardless of age", if they completed kindergarten and/or transferred from first grade from another state. In addition, a "child who becomes six years of age on or before February 1 may, on approval of the board of education in authority, be admitted at the beginning of the second semester of that school year to schools in school systems having semiannual promotions of pupils.

In grades First through eight, placement and promotion will be based on academic progress and accomplishment of objectives assigned to the student. A mastery level of 70% or higher is required for promotion to the next grade level. In grades 9 through 12, placement and promotion of students will be based on the number of credits earned

- To be promoted to Grade 10, a student must earn a minimum of five credits including one credit for a required English and mathematics courses.
- To be promoted to Grade 11, a student must earn a minimum of ten credits including two credit for a required English and mathematics courses.
- To be promoted to Grade 12, a student must earn a minimum of fifteen credits including three credit for a required English and mathematics courses.

The decision-making process includes parents/guardians and staff. Students may be included when appropriate.

**5. Provide, in an attachment (Attachment 4), the school's exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do.**

The school's exit standards for graduating students will be according to the State of Alabama's graduation requirements per Alabama Administrative Code 290-3-1-02(8) and



(8)(a).

## Attachment-4

# High School Graduation Requirements

High schools will be expected to meet the applicable state and authorizer graduation requirements.

1. Describe how the school will meet these requirements. Explain how students will earn credit hours, how grade point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed applicable state and authorizer standards, explain the additional requirements.

Students will earn a half credit for each semester course and a whole credit for a year-long course as long as the minimum required grade was achieved. Students earn credits when they have minimum of 70% average and meet the attendance requirement for the state. Grade Point Average (GPA) is calculated by dividing the total amount of grade points earned by the total amount of credit hours attempted. All semester grades for courses attempted will count toward a student's GPA. Weighted GPA is used to determine class rank. Unweighted GPA is used for admission to most colleges and universities, and for scholarships at in-state schools.

Grading Scale & Course Weight				
Letter Grade	A	B	C	F
Grade Range	90-100	80-89	70-79	69-0
Advanced Placement (AP) / Dual Credit (DC)	5	4	3	0
Pre-AP	4.5	3.5	2.5	0
On-Level Course	4	3	2	0

**Academic Achievement Record (high school transcript) will consist of:**

- All completed course-work
- Numeric and Letter Grades
- Grade Point Average (GPA)
- State Test Scores
- AP and Dual Credits

2. Explain how the graduation requirements will ensure students' college or career

**readiness, and/or both, or other postsecondary opportunities (e.g., postsecondary education, career/technical training, military service, or workplace readiness).**

At the LEAD Academy, college and career readiness is as important as to the students' high school graduation. Students involved in project-based learning will be able to see the relevance and applicability of what they are learning in the classroom.

Additionally, our STREAM360 approach will give more access to low income minority students in those fields. This opportunity will increase the overall success at the college level on any field. Student will be encouraged to take college courses before graduation. In addition to the students meeting the Alabama graduation requirements every student will have the opportunity to explore a career, take AP courses, and college courses as part of their instructional day. This college course taking experience will inspire students to reach their highest potential and prepare them for postsecondary success.

LEAD Academy college guidance team is going to encourage students to enroll in postsecondary technical or academic dual enrollment courses, AP courses, or industry apprenticeship programs before graduation. It will be the explicit expectation of the school that students will have enrolled in at least one postsecondary related course before graduation.

### **3. Explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.**

The LEAD Academy will start the college transition starting from early high school grade levels. In the grade 8, students will be developing individualized graduation plan with their college and career counselors. During these meetings, counselors will help at risk students to design their pathways to college and career. LEAD will ensure that at-risk students meet with success in college or career.

College Guidance Counselor: CG counselors will be available to support students during the school days and weekends. They will monitor individual student's attendance, academic progress, Dual credit enrollments, college and scholarship applications.

Extended Hours: LEAD Academy teachers and college guidance counselors will be available after school hours and weekends to provide extra help specifically at-risk students.

Early intervention/Mandatory Tutoring: Based on the students' benchmark, unit or short term assessments students will be attending mandatory tutorials. Identifying and addressing the needs of the at risk students will give assurance to students' success on all academic areas.

LEADer Seminar: Students in the LEAD Academy will have extra support of a College and career seminars where students can receive variety of personal and youth development supports and life skills management services for students, including but not limited to:

outreach and student recruitment, orientation and engagement, individual and family, counseling and referrals, case management, extracurricular activities, youth leadership development, academic support and tutoring, college exploration and advisement, preparation for employment, employment placement, and support and guidance for planning for postsecondary experiences.

*Home visits:* LEAD Academy will be asking its teachers to visit their students home during the academic year, and prior to the school year starting. Establishing personal level relationship with families will increase the at-risk students' success.

*After school programs:* LEAD Academy will provide after-school and summer enrichment programs that reduce information loss and increase interest in a variety of areas.

**Mentor–Mentee Program/Buddy System:** This program is a one-to-one caring, supportive bond between a mentor and a mentee that is based on trust. Giving a role model to at risk students from same background and circumstances is going to enable those students to succeed.

## **School Calendar and Schedule**

- 1. Discuss the annual academic schedule for the school. Explain how the calendar reflects the needs of the educational program. In an attachment (Attachment 5), provide the school's proposed calendar for the first year of operation, including total number of days/hours of instruction.**

The number of days in school calendar will be 180 days for students. Teachers will be working 190 days including professional development days. The school year will be divided into four quarters and each quarter will last approximately in 45 days. After each quarter, report cards will be sent homes and parent/teacher conferences will be scheduled within a week in order to give opportunity to the parents to discuss their children's progress and to increase parental involvement. Please see Attachment-5 for the proposed calendar.

### **Attachment-5**

- 2. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for subjects such as English language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade. This response should include, in an attachment**

**(Attachment 6), a sample daily and weekly schedule.**

## **Attachment-6**

The daily hours of operation will be from 7:45 AM to 3:10 PM. However, school will be open starting 7:15 until 4 PM. After 3:10 PM, there will be several programs for students such as tutoring for intervention, enrichment activities, and extra-curricular activities. Please see a tentative daily schedule for middle school students.

<b>Daily Schedule</b>	
<b>Time</b>	<b>Activity</b>
<b>7:15</b>	School opens doors
<b>7:15-7:40</b>	Breakfast
<b>7:40</b>	Daily announcements, Pledge of Allegiance
<b>7:45</b>	First period starts
<b>7:45-8:15</b>	Blended learning, ELA & Math Multi-tiered Interventions–PBL activities
<b>8:18-9:03</b>	Mathematics
<b>9:06-9:51</b>	Language Arts (English)
<b>9:54-10:39</b>	Art/Music
<b>10:42-11:12</b>	Lunch
<b>11:12-11:30</b>	Recess
<b>11:30-12:15</b>	Social Studies
<b>12:18-1:03</b>	STEM/Computer/Coding
<b>1:06-1:51</b>	Science
<b>1:54-2:39</b>	Physical Education/Health
<b>2:42-3:10</b>	Character Education with Social Emotional Components
<b>3:10</b>	Dismissal starts
<b>3:10-4:00</b>	Clubs, After school programs, Community based events, Tutorials

LEAD Academy school year will be 180 days, divided into four quarter. Each term will each be 45 days, within each quarter, the school calendar will include four types of days: instructional days, review days, end-of-term exam days, and holidays and breaks.

Followings are proposed weekly calendars for grades K-8 and 9-12. The school day is provisionally scheduled to run from 7:45 AM to 4:00 pm, Monday through Friday. As illustrated in the following schedule, each student in grades K-8 will have 10 periods of instruction a day from Monday through Friday, plus time for lunch and recess. Every teacher will have at least one 45-minute period a day for planning and collaboration with other section teachers and the administrator who will be in charge of academic programs. Grade-level teams will meet formally once a week during this planning period, led by the lead teacher and the assistant principal.

The following table illustrates a sample schedule for students in grades K-8.

<b>Weekly Schedule for Grades K-8</b>						
Period	Time	Monday	Tuesday	Wednesday	Thursday	Friday
1	07:45-08:15	LEAD Hour***	LEAD Hour***	LEAD Hour***	LEAD Hour***	LEAD Hour***
2	08:18-09:03	Math	Math	Math	Math	Math
3	09:06-09:51	Math	Math	Math	Math	Math
4	09:54-10:39	Reading/Writing	STEM/Comp	Reading/Writing	STEM/Comp	Reading/Writing
	10:42-11:12	Lunch	Lunch	Lunch	Lunch	Lunch
	11:12-11:30	Recess	Recess	Recess	Recess	Recess
5	11:30-12:15	Soc. Studies	LOTE	Soc. Studies	LOTE	Soc. Studies
6	12:18-01:03	ELA	ELA	ELA	ELA	ELA
7	01:06-01:51	ELA	ELA	ELA	ELA	ELA
8	01:54-02:39	Science	Science	Science	Science	Science
9*	02:42-03:10	SEL**	Art	Music	PE	PE
	3:10	Dismissal	Dismissal	Dismissal	Dismissal	Dismissal
10	03:10-04:00	Club/Tutorial	Club/Tutorial	Club/Tutorial	Club/Tutorial	Club/Tutorial

\*= Planning Period for teachers

\*\*=Social Emotional learning, Character Education etc.

\*\*\*=Students participate in PBL, Blended Learning, ELA, Math Multi-tiered activities

High school schedules include an advisory period five days a week, when students will meet with faculty advisors to discuss their personal aspirations, educational and career goals, challenges, and progress. Students will choose at least one club that may include chess, English and math tutoring, theater, art, and puzzles (problem-solving). As the school expands in grades, additional activities will be offered to include athletic activities and social events; community service projects; and such school-based organizations as the student council and the school's newspaper.

The following two tables illustrate sample schedules for students in grades 9-12. As noted there are two schedules for group A and B. Students will be assigned to either one of these groups. Unlike K-8, high school students will have block schedule. Each block is 90 minutes.

<b>Weekly Schedule for Grades 9-12 (Group-A)</b>						
<b>Period</b>	<b>Time</b>	<b>Monday (A)</b>	<b>Tuesday (B)</b>	<b>Wednesday (A)</b>	<b>Thursday (B)</b>	<b>Friday (A)</b>
<b>0</b>	07:45-08:15	LEAD Hour***	LEAD Hour***	LEAD Hour***	LEAD Hour***	LEAD Hour***
<b>Block-1</b>	08:18-09:51	Math	Electives	Math	Electives	Math
<b>Block-2</b>	09:54-11:12	ELA	Electives	ELA	Electives	ELA
	11:15-11:45	Lunch	Lunch	Lunch	Lunch	Lunch
<b>Block-3</b>	11:48-01:18	Soc. Studies	Electives	Soc. Studies	Electives	Soc. Studies
<b>Block-4</b>	01:21-02:51	Science	Electives	Science	Electives	Science
<b>Advisory</b>	02:54-3:15	Advisory	Advisory	Advisory	Advisory	Advisory
	3:15	Dismissal	Dismissal	Dismissal	Dismissal	Dismissal
	03:15-4:00	Club/Tutorial	Club/Tutorial	Club/Tutorial	Club/Tutorial	Club/Tutorial

<b>Weekly Schedule for Grades 9-12 (Group-B)</b>						
<b>Period</b>	<b>Time</b>	<b>Monday (B)</b>	<b>Tuesday (A)</b>	<b>Wednesday (B)</b>	<b>Thursday (A)</b>	<b>Friday (B)</b>
<b>0</b>	07:45-08:15	LEAD Hour***	LEAD Hour***	LEAD Hour***	LEAD Hour***	LEAD Hour***
<b>Block-1</b>	08:18-09:51	Electives	Math	Electives	Math	Electives
<b>Block-2</b>	09:54-11:12	Electives	ELA	Electives	ELA	Electives
	11:15-11:45	Lunch	Lunch	Lunch	Lunch	Lunch
<b>Block-3</b>	11:48-01:18	Electives	Soc. Studies	Electives	Soc. Studies	Electives
<b>Block-4</b>	01:21-02:51	Electives	Science	Electives	Science	Electives
<b>Advisory</b>	02:54-3:15	Advisory	Advisory	Advisory	Advisory	Advisory
	3:15	Dismissal	Dismissal	Dismissal	Dismissal	Dismissal
	03:15-4:00	Club/Tutorial	Club/Tutorial	Club/Tutorial	Club/Tutorial	Club/Tutorial

## School Culture

- 1. Describe the culture of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.**

The LEF Board members primary goal is to create a warm and positive school culture

where all members (students, teachers, parents, and guests) feel welcomed and appreciated. It is our belief that the school leadership sets the organizational structure and tone, but every member contributes to the social emotional learning and interactions, activities, and experiences that form the school culture.

The design of the school program, including curricular activities and resources, shows that the leadership cares deeply about creating opportunities for deep and successful learning for each student. We believe that the following components our program will lead to a thriving organization that promotes a positive school culture.

*Highly Qualified and Compassionate Teachers:* Our staffing efforts will ensure that all our teachers are highly qualified to teach their assigned subjects. We will create conditions that require teachers to demonstrate their skills and interactions with children prior to hiring them. As part of the interview process, each teacher will be informed of the school curriculum and activities and will answer questions regarding his/her personal philosophy of education, to ensure alignment with our unique approach to student learning. Teachers' intuition and positive interactions with students will be an important factor in the hiring process.

*Curriculum and Learning Activities:* We will train our teacher to properly deliver curriculum and conduct learning activities that promote students' self-efficacy, motivation, self-regulation, and the enhancement of social interactions. All of these are considered important influences on academic achievement and a positive school environment:

- *Project Based Learning:* Theme and project- based learning opportunities will help students make sense of the world around them as they enhance their knowledge in specific subject areas.
- *Arts Education and Integration:* Students will have opportunities to participate in the arts (visual and digital arts, music, and drama) throughout the day, found to enhance the social learning environment.
- *Athletics Programs and Competitions:* Students will be encouraged to participate athletic clubs and competitions in team sports to enhance school support and culture.

**2. Explain plans for creating and implementing this culture for students, educators, instructional leaders, and parents starting with the first day of school. Describe the plan for transitioning students who enter school mid-year into the school's culture.**

The founding members believe top-to-bottom effect when it comes to establishing school culture and high expectation for all. Therefore, it is our belief that the school leadership sets the organizational structure and tone even before the school opening. The school administrators expect every member of the school community to contribute to the social interactions and activities that will form a strong school culture. Teachers will be respected and engaged with students as their mentors and advocates. This engagement will include fostering a positive working partnership between the student, their family and

the school. Expectations of students and teachers will be articulated daily.

LEAD Academy will utilize the following strategies to build its school culture of high expectation and culture of collaboration:

1. Creating strong relationships among school community: It will be a priority of our administrators and teachers to build strong trust and relationship among all school community. The school leaders and teachers need to have time to talk to their students in and out of the classroom. The goal should be for every adult in the building to maintain a high rate of positive interactions with students and to show genuine interest in their lives, their activities, their goals and their struggles.

2. Teaching social skills: LEAD Academy will offer character education classes where faculty and staff talk about acceptable social skills. Teacher will also talk about behaviors and values include honesty, sensitivity, concern and respect for others, a sense of humor, reliability, and so on. Teachers will identify the social skills and teach them step-by-step throughout the year.

3. Role modeling: Students are influenced by observing the actions of others how they respond to their environment and cope with unfamiliar situations. LEAD Academy will invite successful community leaders to share their life experiences with our students.

4. Clarifying classroom and school rules: LEAD Academy will create positive rules help create a predictable, stable environment that is more conducive to healthy interactions. School and classroom rules will help communicate our expectations to all school community.

5. Setting appropriate consequences: Establishing classroom and school-wide rules and procedures is an important step in any effort to bring more structure to your school. Effective consequences show young people the connection between what they do and what happens as a result of their choices or actions. Consequences need to be appropriate, immediate and consistent. Equally important, they need to be delivered with empathy, not in anger.

6. Praising students for good choices: Many of our students, especially those who struggle, don't receive nearly enough positive feedback in the classroom or in their personal lives.

Students who are transferred mid-year are always welcomed, space permitting. Upon enrollment, the student and parent/guardian will be given an orientation. Following this, the student will be introduced to the school principal who will personally welcome the family to the school and provide a tour of the building. The third step of the process is a debriefing of what the school's expectations are and an overview of the student handbook. Finally, the student will be introduced to his/her teacher and classmates. The classroom teacher then will assign him/her a body among his classmates to help guide him/her until the new students acclimates to school environment.

**3. Explain how the school culture will take account of and serve students with disabilities, students who are English learners (EL), and any students who are academically below grade level.**



All students including students with disabilities are entitled a free appropriate public education and to learn at the LEAD Academy in the least restrictive environment. No student at LEAD Academy will be unlawfully excluded from participation in any program or activity of the School, nor will the student be subject to discrimination by LEAD Academy because of a disability. LEAD Academy uses an inclusion model for our special education students. Our special education staff will support the students in their assigned classrooms. The continuum of services will include intervention at the school level, district support, and outsourced services as applicable.

The proposed school culture creation strategies mentioned above will be implemented for all students regardless of their gender, social, disability status. Therefore, positive school culture will increase the effect of the instructional support for low performing students. LEAD Academy curriculum and culture has been designed to help struggling and low performing students. Teachers will be trained data analysis, individualized goal setting and progress monitoring, and parent communication. The curriculum and data systems include pre-assessment, data review, continual progress monitoring, and structured support. The following table summarizes interventions at multiple level for students with disabilities and low performing.

<b>Intervention Level</b>	<b>TIER-I</b>	<b>TIER-II</b>	<b>TIER-III</b>
Support Provided by	Teachers	Interventionist / teacher	Interventionist / Teacher
Student Groups	All Students	Small Groups (5-20%)	Individual or Small Group (1-5%)
Group Size (Whole/Small/Individual)	W & S	Small Groups	Individual or Small Group
Learning Standards	On grade level	On the grade level	Below Grade Level
When?	Regular & LEAD Hours	LEAD Hours, Pull-outs & Tutorials	LEAD Hours / Pull Outs & Tutorials

LEAD Academy will provide accommodations/modifications as necessary to permit access to technology-based learning and the related services provided on the student’s IEP. The modifications/adaptations shall include, but are not limited to:

- Adapted curriculum assignments
- Test modifications
- Computer pacing and remediation; and
- Adapted computer devices

It is important to note that exceptional education students are assessed on an ongoing

basis. Each course's curriculum is developed to include regular assessments to determine student mastery. If a student does not exhibit mastery, the Intervention Specialist will work with the classroom teacher to modify the curriculum and/or pace of delivery within the general lab setting. All classroom teachers are provided with the appropriate IEP's and staff support to address the identified goals. The School's curriculum is capable to deliver content in a variety of formats that are compatible with assistive technology and accommodate different abilities and learning styles, based on research findings that equitable access to learning materials ensures that students with disabilities have equal opportunities to achieve to their highest potential. The curriculum uses many of the principles of instructional design & learning theory recognized as teaching techniques for students with learning disabilities. Teachers have found the self-paced structure, small steps with immediate feedback, and extensive practice is particularly useful for students with learning disabilities. The curriculum is reviewed on an annual basis to ensure alignment that the learning needs are being met.

## Supplemental Programming

- 1. If summer school will be offered, describe the program(s). Explain the schedule and length of the program, including the number of hours and weeks. Discuss the anticipated participants, including number of students and the methods used to identify them. Describe the anticipated resource and staffing needs for summer programs.**

LEAD Academy does not plan to offer a summer school. The summer school may be offered only for failing students.

- 2. Describe the extra- and/or co-curricular activities or programming the school will offer; how often they will occur; and how they will be funded and delivered.**

LEAD Academy will offer a wide range of clubs and athletics activities. Additional programs and activities will be offered during and after school hours. Leadership activities such as Honor Society, Boy Scouts, Girl Scouts, and Student Council will be organized.

LEAD Academy is planning to develop agreements with several local public or private schools to conduct joint hands-on science and mathematics education programs, joint arts exhibitions, and joint sports competitions at all grade level. LEAD Academy will contact with the City Police Department to provide a Drug Free program at the school. The officers of the police department will hold seminars to inform the students about the dangers of drug use.

Some of the clubs that will be offered for LEAD Academy students are:

**Computer and Coding Club:** Students with an interest in computer technology will have the opportunity to learn new skills and practice those previously learned. Projects will be

developed around areas that the club members suggest. Possible areas of exploration will be Internet searching and Hyper Studio. The members of this club will introduce new developments in computer technology to other students.

**Math Club:** Math Club is an after-school activity which will use a variety of games designed to promote math skills and thinking strategies. Students with a high interest in math and related areas will learn to make better use of their skills. Peer tutoring and coaching will also occur among students who excel in math and those who struggle with the subject. Peer tutoring and coaching will take place between the upper grades.

**Science Club:** Students with an interest in science will be given an opportunity to experience hands-on activities and experiments in the various areas of science. This club will organize small competitions and exhibits about science and increase the popularity of science at LEAD Academy. This club will occupy the most important place in the co-curricular life at LEAD Academy.

**Chess Club:** The purpose of the chess club will be to give students the opportunity to practice the strategy of chess. Students will take turns pairing with each other during each session. At the end of the year, there will be a contest to determine who is the champion chess player for that year. During the winter, there will be a district contest held at LEAD Academy.

**Art Club:** Students with an interest in art will have an opportunity to work with different ideas and materials not usually experienced in art class. Students need not be registered in an art class to join. Students will do fun art activities along with an emphasis on community service.

**Team Sport Clubs (basketball, soccer, etc.):** Open to any student who is interested in team sports such as basketball and soccer. These club will support drug prevention programs by encouraging the students in sport activities.

### **3. Describe the programs or strategies that will be used to address students' mental, emotional, and social development and health courses or the needs of the school.**

The Board of directors believe that students need a supportive and socially nurturing educational environment that promotes high levels of engagement through active learning experiences. The proposed school program will promote high levels of literacy and academic achievement through a multifaceted view of students' educational requirements. We believe that, in addition to a rigorous educational program, the foundation for students' future success depends on their developmental, social and emotional growth in a positive learning environment. Research conducted on the social-cognitive theory of learning demonstrates that a student's self-efficacy influences his or her academic achievement.

The Board of Directors will coordinate with the Chicago based nonprofit, Collaborative for Academic Social and Emotional Learning (CASEL), to integrate Social Emotional Learning

(SEL). The SEL is a systematic, evidence-based approach to teach students how to achieve goals, understand and manage emotions, build empathy, forge relationships, and make responsible decisions. Studies show that students participating in SEL programs showed improved classroom behavior, an increased ability to manage stress and depression, and better attitudes about themselves, others, and school.

Additionally, students with behavioral health needs will be supported by our counselor. The proposed school will also form a partnership with local organizations for additional help. One of our board members is a physician and capable of identifying these partner organizations.

**4. If applicable, describe any other student-focused activities and programs that are integral to the educational and student-development plans.**

LEAD Academy will identify and enter into MOU with local and national organizations to help our high school students to obtain summer internship opportunities. These paid or non-paid internship opportunities will help prepare our students for college and beyond.

LEAD Academy will organize science fairs and competitions and support our students to participate in local, national, and international contest. The proposed school will provide necessary academic and financial support for these activities when funding is available. When appropriate, LEAD Academy will organize local, national, and international exchange trips for its students.

## **Special Populations and At-Risk Students**

**1. Describe the overall plan to serve students with special needs, including, but not limited to, students with Individualized Education Programs (IEPs) or Section 504 plans; English Learners (EL); students identified as intellectually gifted; and students at risk of academic failure or dropping out. Identify the special populations and at-risk groups that the school expects to serve, whether through data related to a specifically targeted school or neighborhood or more generalized analysis of the population to be served. Discuss how the course scope and sequence, daily schedule, staffing plans, and support strategies and resources will meet or be adjusted for the diverse needs of students.**

LEAD Academy will comply with all federal and state authority concerning the education of students with disabilities, including the Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act. The school will identify, locate and evaluate a child who has a suspected disability and provide the parent with information on the referral process. Any child, regardless of suspected disability will be evaluated and provided the appropriate services to receive a free appropriate public education.

We estimate that 10 to 15% of our students will need special education, ELL, or gifted services. The School is committed to identifying and meeting the learning needs of all its students, including students with Individualized Education Programs (IEPs), 504 Plans, English Language Learners (ELL), students identified as intellectually gifted, and students at risk of academic failure or dropping out. The School will comply with all federal and state authority concerning the education of students with disabilities, including the Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act. The School will comply with the federal Child Find mandate to identify and evaluate students who have, or are suspected of having, disabilities and need exceptional services.

After the students enroll in LEAD Academy, an identification list will be created for students who have a disability. The parent will sign a consent form to release the academic records which are related to special education or Section 504. The Director of Special Education and Child Find will request special education or Section 504 records from the previous school immediately. After the initial identification with the enrollment documents, the school will contact parents to confirm and start the process for the services. The school will set up a transfer IEP meeting with the parent. The parent will be provided with an IEP notice and the procedural safeguards. If an interpreter is needed, the school will arrange an interpretation service to the parent. After the transfer IEP, the parent will be provided a copy of the IEP. The Director of Special Education and Child Find (DSECF) will inform and disseminate the accommodations and IEP goals to the related personnel. Progress monitoring will be communicated with the parent throughout the school year. Our goal is to have all students in the least restrictive environment to access the general education curriculum. Based on the student's IEP, the appropriate instructional services will be provided. The least restrictive environment will be considered first. The instructional services that could be provided will be inclusion, resource, self-contained, or homebound. If needed, the school will provide an alternative placement.

Based on the federal law, Child Find is a requirement for all schools to find students with disabilities. The school will have response to intervention to address students who are not identified as a special education student yet. The student support team will meet and review student needs and progress of the interventions being implemented. Interventions will be provided by the general education teacher and support staff. Parents will be involved in this process and informed of the student's strengths and areas of need. If the interventions do not respond to the student's needs, a parent may request an evaluation, with or without having the RTI process. With the consent of the parent, the student can be referred for an evaluation to determine a need for eligibility and special education services.

To help ensure that English Language Learners (ELL) attain English proficiency, develop high levels of academic attainment in English, and meet the same state academic content and student academic achievement standards that all students are expected to meet. All language-minority students will be able to attend LEAD Academy, regardless of their ability to produce a birth certificate, social security number, or immigration documentation.

LEAD Academy will be using Home Language Survey (HLS) to start the identification

process of the English Learners. School personnel will be trained to meeting the needs of students from different cultures with different levels of English proficiency.

The Home Language Survey must contain:

- Is a language other than English spoken at home?
- Is your child's first language a language other than English?
- What language did your child learn when her/she first began to talk?
- What language does your child most frequently speak at home?

Initial assessment of English language proficiency will be conducted to determine the level of English proficiency and to facilitate appropriate instructional and program placement decisions. English language learner (ELL) students identified through the HLS during registration before the beginning of the school year will be assessed for English-language proficiency within thirty (30) days of enrollment. ELL students who register after the beginning of the school year will be assessed within ten (10) days of enrollment. LEAD Academy will record the registration date as "original entry date" on INOW or if the child is newly arrived in the county, "date first enrolled in US school," when completing the demographics page of the ACCESS for ELLs® English proficiency test.

Teachers and the student's parents will plan the means for instruction in English and or specific modifications or accommodations. ELL students shall have equal access to appropriate English language instruction and instruction in basic subject areas that is understandable to the students given their level of English proficiency; and equal and comparable in amount, scope, sequence, and quality to that provided to English proficient students.

Classroom accommodations may include differentiated instruction, visuals and graphic organizers, and alternate assessment as necessary.

Using a blending instruction, each student has the opportunity to work through their Individualize Academic Plan based on the data from several data points. Students engage daily in high levels of rigor and relevance, through collaborative and personalized learning experiences using instructional software to support their needs. Teachers will actively monitor the progress. Students will be able to listen to instructional text read aloud, and participate in interactive self-assessments with immediate feedback.

LEAD Academy will use early warning system indicators to identify the patterns of students that are off-track and access resources at the school to re-engage those students. The school will have a Multi-Tiered Support System team at the school (See table below). This model promotes student achievement through engaging, high quality instruction by using a team approach to guide student's educational and behavioral practices.

This process is defined in tiers of intervention. These tiers include increasing levels of intervention intensity. Using the tiers of interventions, the team will deliver targeted interventions for students at-risk. Students will be provided with interventions at increasing levels of intensity to accelerate their rate of learning.

TIER I	TIER II	TIER III
<ul style="list-style-type: none"> <li>• Takes place during main/core hour and LEAD hours</li> <li>• Serves all students</li> <li>• Provided by classroom teacher of record</li> <li>• Includes lesson reteach/extension as needed</li> <li>• Standards based grouping</li> </ul>	<ul style="list-style-type: none"> <li>• Takes place during LEAD hours</li> <li>• Serves some identified students based on data</li> <li>• Provided by classroom teacher and/or interventionist</li> <li>• Includes explicit reteach/extension of specified topic</li> <li>• Standards based grouping</li> <li>• After school and Saturday tutorials</li> </ul>	<ul style="list-style-type: none"> <li>• Takes place during LEAD hours</li> <li>• Provided by the interventionist, ESL teacher, and Special Education teacher</li> <li>• Includes explicit instruction to include skill gaps</li> <li>• Skills based grouping</li> </ul>
<b>Assessment Data:</b> <ul style="list-style-type: none"> <li>• Previous year State Test Results</li> <li>• Previous year NWEA</li> </ul>	<b>Assessment Data:</b> <ul style="list-style-type: none"> <li>• Previous year State Test Results</li> <li>• NWEA</li> </ul>	<b>Assessment Data:</b> <ul style="list-style-type: none"> <li>• NWEA</li> <li>• Skills Navigator (NWEA)</li> </ul>
<b>Progress Monitoring:</b> Monthly Lexile level check~ Assessments Curriculum Based /District Assessment /Mock College Readiness	<b>Progress Monitoring:</b> Monthly Lexile level check~ Assessments Curriculum Based /District Assessment /Mock College Readiness	<b>Progress Monitoring:</b> NWEA Skills Navigator every two weeks

Students are a part of a school within a school where they engage in rigorous learning experiences that allows them to learn not just in their core content area, but also through their real world experiences. The Instructional program provides opportunities for students to master core academic content, think critically and solve complex problems, work collaboratively, communicate effectively and learn how to learn.

**2. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports the school will provide for these students.**

In order to increase the effect of the instructional support for low performing students, programs and strategies will be based on reliable and actionable data collection and monitoring. Based on available data in Montgomery County, we expect the majority of our students to enter with gaps and deficiencies. Thus, LEAD Academy curriculum and culture has been designed with this in mind. Teachers will be trained in data analysis, individualized goal setting and progress monitoring, and parent communication. The curriculum and data systems include pre-assessment, data review, continual progress monitoring, and structured support. The following table summarizes intervention levels at multiple level.

Intervention Level	TIER-I	TIER-II	TIER-III
Support Provided by	Teachers	Interventionist / teacher	Interventionist / Teacher
Student Groups	All Students	Small Groups (5-20%)	Individual or Small Group (1-5%)
Group Size (Whole/Small/Individual)	W & S	Small Groups	Individual or Small Group
Learning Standards	On grade level	On the grade level	Below Grade Level
When?	Regular & LEAD Hours	LEAD Hours, Pull-outs & Tutorials	LEAD Hours / Pull Outs & Tutorials

The school will have a school-wide performance assessment system in which each student will complete a test at entry, which will measure their functioning grade level in reading and mathematics. The school will use this information to drive interventions that align with the students' need to ensure we are providing all levels of intervention support. Every day students take part in daily custom learning time where they receive interventions, skill support, tutoring and acceleration and enrichment at their level of learning. The students will be regularly benchmarked against the Alabama College and Career Ready Standards to ensure mastery.

3. **Explain more specifically how the school will identify and meet the learning needs of students with mild, moderate, and severe disabilities. Specify the programs, strategies, and supports the school will provide, including the following:**
  - a. **Methods for “identifying, locating, and evaluating” students with disabilities who are in need of special education and related services; (and avoiding misidentification).**

LEAD Academy will act in accordance with the federal and state Child Find directives to identify and evaluate students who have, or are suspected of having disabilities and need special services. To address the physical, emotional, medical and behavioral issues, the guardians and the school will complete a Referral form. This referral will be given to the Special Ed teacher. After the referral data collection within 30 days of the receipt of written notification of concerns regarding a child, the IEP team, including the parent, will meet to review existing data and determine whether a referral for consideration of eligibility for



special education is necessary.

**b. Plans for hiring and evaluating certified special education teachers and licensed related service providers, including projecting adequate staffing for the anticipated population of students.**

The initial special education recruitment for the LEAD Academy will be one special education teacher, with more teachers or other support personnel added as student enrollment requires and IEPs require. The Special Education teachers need to have a Bachelor's degree in Education, Special Education, Curriculum and Instruction, Education Leadership or other related fields with Education from an accredited university or college. As necessary, contract special education services will be utilized.

**c. Specific instructional programs, practices, and strategies the school will employ to ensure students with disabilities are provided a free appropriate public education in the least restrictive environment.**

Each student with a disability is eligible to receive a free appropriate public education (FAPE) in the least restrictive environment that will allow the student to progress in the general curriculum environment. Particularly, intended teaching and assistive technologies, accommodations, and/or modifications as designated in the student's IEP will help the most.

**d. Plans regarding continuum of placements, access to the general education curriculum, and the opportunity for students with disabilities to be educated with nondisabled peers to the greatest extent appropriate.**

As determined by the IEP committee LEAD academy will ensure that a variety of services is available to meet the needs of students with disabilities for special education and related services. Service delivery may include;

- Speech/ Occupational and other therapy services
- Conference with student,
- Resource room pull-outs
- Regular class inclusions

Based on the review of the IEP committee, new needs, suggestions for accommodations, or supplemental supports will be provided by LEAD Academy Special education department.

**e. Plans for monitoring and evaluating the progress and success of students with disabilities.**

According to each student's IEP, the Special Education students' progress will be evaluated. The teachers of Special Education will maintain and provide progress monitoring reports, academic grades, attendance and behavioral records, and other records that are needed by the national and state regulatory guidelines.

The academy's effectiveness in serving special education students will be assessed in the ability for the student to exhibit learning improvements consistent with the annual goals specified in the student's IEP. Also, data from State and school assessments (Initial assessments, screening, progress monitoring, and diagnostics) will be gathered and monitored regularly by the Special Education and General Education teachers to measure growth and determine if modifications or alterations to instructional methods or accommodations are needed.

**f. Plans for promoting college- and career-readiness for students with disabilities, including high school graduation and post-school indicators.**

Before the age 16, IEP meeting will be held for the appropriate transition. Transition plans will be addressed in the IEP via measurable postsecondary goals based on transition assessments related to training, education, employment, and independent living skills and the transition services needed to assist the child in reaching those goals. Below items will be discussed and execute accordingly;

- Transition Assessments,
- Postsecondary Education (Training, Employment, and Goals)
- Anticipated Date of Exit,
- Pathway to the Alabama High School Diploma,
- Program Credits to be Earned,
- Total Number of Electives,
- Measureable Annual Goals for Postsecondary Education

**g. Plans regarding self-monitoring of disproportionality in the areas of identification, least restrictive environment, and disciplinary actions, including suspension/expulsion of students with disabilities. Self-monitoring of disproportionality should include an understanding of the coordinated early intervening services (CEIS) requirements when significant disproportionality has been determined by the Alabama State Department of Education/Special Education Services.**

Disproportionality is the more representation of a specific race or ethnic group in a program or system compared to their representation in the over-all populations. When we say disproportionality in Special Education includes comparisons by race or ethnicity between groups of students identified as eligible for special education and related services. Students from a specific ethnic group identified at a larger rate than all other racial/ethnic groups. The most important causes that contribute to over-representations are:

- The special education referral process
- Eligibility determination and placement
- Identification errors
- False assessment and evaluation
- Ineffective instruction strategies in the general education setting

Students with disabilities cannot be removed from school more than 10 days. The school

will be responsible for educational services so as to enable the children to continue to participate in the general educational setting, even though in alternative setting, and to improvement toward meeting the goals set out in the IEP.

**h. Self-monitoring methods to evaluate procedural and substantive compliance with special education rules and regulations.**

Self-monitoring procedures to evaluate procedural and substantive compliance will require following and executing special education local, state and federal rules and regulations. The SPED teacher/Coordinator will lead the teachers in the monitoring of compliance using a school based checklist on a quarterly basis. School will review and audit of student special education folders with the leadership of the assistant principal and/or principal. Also, the principal will ensure staff members are trained in:

- 1- Understanding Indicator 9
- 2- IEP review process
- 3- Collaboration with service providers
- 4- Change of placement steps

LEAD Academy personnel will be trained Coordinated Early Intervening Services (CEIS) requirements and the steps to take early-on in a child's education and if for any reason, significant disproportionality has been determined by the Alabama State Department of Education Special Education Services.

**4. Explain how the school will identify and meet the needs of intellectually gifted learners, including the following:**

**a. Approach to defining gifted, methods for ensuring equity and comparability in identification of students in need of gifted services, and methods for monitoring and ensuring racial equity in the gifted program.**

Based on the ALSDE definition Gifted means: "Intellectually gifted children and youth are those who perform or who have demonstrated the potential to perform at high levels in academic or creative fields when compared with others of their age, experience, or environment. These children and youth require services not ordinarily provided by the regular school program. Children and youth possessing these abilities can be found in all populations, across all economic strata, and in all areas of human endeavor" (Alabama Administrative Code (AAC), 29-8-9.12 (1). LEAD academy will use a systemic identification process, to identify the students based on the definition above. LEAD Academy will make sure that trained school personnel who are knowledgeable in identifying and reaching gifted students through the ALSDE required services to provide gifted education services. Also, data will be analyzed and reviewed continuously as to evaluate program effectiveness.

**b. Certification requirements for gifted specialists and professional development targets for general education teachers who teach gifted learners.**

LEAD Academy will comply with Alabama Administrative Code (AAC), section 290-8-9.12 related to gifted education. LEAD Academy will designate an administrator and/or a Gifted teacher who is also a certified to oversee the gifted program. Also, teachers of gifted students will be highly trained and able to deliver support and instruction in this area. All LEAD Academy teachers will receive training in differentiation to provide for these students. School will offer on-going professional development chances that will aim other strategies and instructional methodologies that will aid in accelerating students' performance.

- c. Methods for ensuring the needs of gifted learners are met and continuum of service delivery options that will be offered (e.g., pull-out classes, advanced classes, interest clusters, cluster grouping with differentiated curriculum for gifted learner, acceleration procedures, field studies, and mentors, all of the above).**

Plan of the LEAD Academy is to ensure the needs of all learners are met, including those identified as gifted learners. Our Gifted program will be allowing for cluster grouping and differentiation. Gifted students in the upper grades will have chances for independent coursework as electives as well. Individual gifted plan and activities will be documented and reviewed quarterly. In the state of Alabama, two models to identify and serve gifted students are used and will be available for LEAD Academy students:

- Gifted Program is a delivery model to provide services to identified gifted students using the ALSDE Gifted Eligibility Determination Form and requires a gifted certified specialist to facilitate.
- Enrichment Model Program is a delivery model to provide services to identified gifted students plus an additional identified talent pool using a state-approved, multiple-criteria eligibility matrix. An Enrichment Model Program requires a certified gifted specialist to facilitate.

Grades K-8: Consultative services-gifted specialist consults with classroom teachers to develop differentiated lessons, activities, and/or centers. Pull-out classes-gifted specialist provides student-centered, pull-out classes using concept-based curriculum that provides opportunities for career exploration, real-world problem solving, authentic learning, and authentic audiences.

Grades 9-12: In the grades 9-12, the curriculum resources will support gifted and talented learners through access to Honors and Advanced Placement courses, and dual enrollment.

- d. Methods for determining cognitive and affective growth among gifted learners.**

Lead Academy will make sure that particular practices are documented for gifted students. School will use pre- and post-assessment data for defining cognitive and affective progress among gifted learners. Based on the state's The Gifted Standards and Student Outcomes LEAD Academy will create a document that will be used to provide a list of competencies and skills that will be mastered and to keep track of what has been mastered. These standards will give important data and is another tool that can provide information to the

students and to parents about what a student knows and is expected to know as she/he matriculates in the gifted program.

**e. Procedures related to the monitoring of achievement data for gifted learners, including plans for disaggregation and distribution of results to parents.**

LEAD Academy will use the documents based on the ALSDE Gifted Eligibility Determination forms as a benchmark to progress. In the individual Gifted student folders, the pre- and post- assessments reports, student instructional performance, creativity, projects and other classroom measures used to evaluate student performance will be kept. The assessment information will be reviewed and as longitudinal data to make projections and recommendations regarding student performance and setting goals. Every 9 weeks, the RtI team will review the progress of the gifted students and will discuss the students' progress with gifted students and their parents.

**f. Self-monitoring methods for the gifted program, including what, when, and by whom.**

The LEAD Academy Gifted teacher will complete a Folder Review Checklist form for each Gifted student to assist with a self-review one time during the school year. Required State documents will be uploaded to STISETS during the school year. The ASSIST Gifted Compliance Monitoring Template will be completed one time a year. The document will be completed by the School administration and Gifted Specialist. The monitoring items include: Referral, Public Notice, Equity, Second Grade Child Find, Standard Referral, Gifted Referrals Screening Team, Consent, Evaluation, Aptitude, Performance, Characteristics, Aptitude Test Selection, Eligibility Determination, Timeline, Eligibility Criteria, Placement and Service Delivery Options, Gifted Education Plan, Gifted Education Accommodations, Transportation, Child Count, LEA Plan for Gifted, Transfer Students, Responsible Staff Person, Caseloads and Procedural Safeguards. In addition, the Gifted Specialist Questionnaire form, the General Education Teacher Response Form, and the Mandatory Gifted Specialists' Schedule and Caseload Form will be completed. The School will also ensure that the Gifted Specialist submits a Concept-Based Curriculum Unit that they are teaching during the school year.

(<https://www.alsde.edu/sec/cm/Self%20Assessment/Gifted%20LEA%20Compliance%20Monitoring%20Self-Assessment%20Manual%202017-2018.pdf>)

**5. Explain how the school will meet the needs of English Learner (EL) students, including the following:**

**a. Methods for notifying parents/caregivers in a language they understand about the procedures that the school will use to identify EL students for possible language acquisition support.**

LEAD Academy will adhere to all requirements of State and federal law relating to English Learners (EL). The School will be responsible for state and federally required services to EL students in compliance with the guidelines provided by the Alabama Department of

Education. A Home Language Survey will be given to every student at enrollment stage. If the primary home language is a language other than English, the student will be scheduled for the state-identified English language proficiency screening test, the WIDA. If the student is identified based on performance on the WIDA, the school staff will document the identification, proper language instructional program goals, and applicable instructional and testing accommodations in the student's plan. The school will meet with the parent/guardian of the student and communicate with the school's support services using translation services as necessary.

To increase the effectiveness of the program and to meet the federal and state expectations LEAD academy will be using one of the online based programs which is called ELlevation.

**b. Methods for identifying and evaluating EL students with disabilities in a timely manner by administering special education evaluations in the child's native language, unless it is clearly not feasible to do so (ensuring that a student's language needs can be distinguished from a student's disability related needs).**

LEAD Academy will meet with the federal Child Find required to identify and evaluate students who have, or are suspected of having, disabilities and need special education services. LEAD academy will follow the state and federal procedures for the education of ELs with disabilities as well. The School or parent will complete a Referral of Concern form to address behavioral, medical, physical, or emotional issues that are limiting the student's ability to function in the academic environment. This referral will be given to the special education Teacher. Within 30 days of the receipt of written notification of concerns regarding a child, the IEP team, including the parent, will meet to review existing data and determine whether a referral for consideration of eligibility for special education is necessary. The school will communicate using translation services as necessary.

If an EL is suspected of having a learning disability, LEAD Academy will follow many of the same processes it does for all students (RtI) with the exception that it must also be determined that language is not the only obstacle to achievement. As soon as it has been determined that language is not the barrier, the SST will follow the same procedures as it will for all other students.

**c. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students.**

To make sure that English Language Learners (ELL) attain English proficiency, develop high levels of academic accomplishment in English, and meet the same state academic content and student academic achievement standards that all students are required to meet. Teachers and the student's parents will plan for instruction in English and or specific modifications or accommodations. ELL students shall have equal access to appropriate English language instruction and instruction in basic subject areas that is clear to the

students given their level of English proficiency; and equal and comparable in amount, scope, sequence, and quality to that provided to English proficient students.

Our School will use the best model based on the students' needs and teacher certifications and qualifications, and factors such as number of ELs registered in the School, to select the service delivery model which will be used at the school. The options include:

- Sheltered English or content-based programs
- ESL push-ins and pull outs
- Newcomers Program
- Bilingual Program

Classroom accommodations may include differentiated instruction, visuals and graphic organizers, and alternate assessment as necessary. LEAD Academy will arrange a committee to cultivate an action plan that will show how and when goals and strategies will be met, the personnel accountable for each action step, and the funding necessary to implement the program.

- d. Plans for monitoring and periodic evaluation of the progress and success of EL students, including using a reliable English language proficiency (ELP) assessment that tests in the four language domains, identifying benchmarks for exiting students from EL services, and defining plans for providing follow-up support for at least two years after students exit the program;**

LEAD Academy will follow State and federal law that mandates ELL students to be annually assessed on the state-identified English language proficiency test until the student meets the exit criteria. Student's English language proficiency is assessed using the WIDA ACCESS placement Test (W-APT). Students have to achieve a score of 4.8 to exit from the program. Students who exit the program will be monitored after exiting for two years. Also, further academic support will be provided if students begin to have difficulty. If it is determined that a student is not making satisfactory progress, a team meeting with parental participation will take place to review all pertinent information and recommend a suitable plan.

- e. Means for providing qualified staffing for EL students.**

The Principal and/or Assistant principal will oversee the compliance of the ELL program. The ESL teacher will be responsible for reporting on compliance, monitoring and exiting ELL students from the program.

## **Student Recruitment and Enrollment**

- 1. Explain the plan for student recruitment and marketing that will provide equal access to interested students and parents. Specifically describe the plan for outreach to students and families who have an economic or academic**

**disadvantage that requires special services and assistance to succeed in educational programs. Those students include, but are not limited to, students who are members of economically disadvantaged families, students who are identified as having special needs, students who are limited in English proficiency, students who are at risk of dropping out of high school, and students who do not meet minimum standards of academic proficiency.**

The School attempts to achieve racial and ethnic balance by being open to all students and openly marketing to every subsection of the potential student population. Upon approval of this application, the proposed school will open an Enrollment Office to begin attracting and enrolling students for enrollment at the beginning of the 2018 – 2019 school year. After that, the School will offer daily enrollment for students who wish to enroll, space permitting. Marketing this new, innovative option for students and parents is essential to ensure widespread student participation and community support. The marketing communications team will work with the school's staff throughout the year to develop a turnkey marketing plan to reach the target student population.

The marketing team will determine the right integrated marketing campaign to effectively generate the desired enrollment goals. Mediums of communication available to the School will include:

- TV advertising
- Radio advertising
- Newspaper advertising
- Web advertising
- Parent/Student informational sessions
- Email marketing campaigns
- Posters
- Custom website
- Custom brochures
- Education fairs
- Corporate sponsorships
- Phone Calls

The school administrators and staff will be fully-trained and experienced to answer questions, process appropriate enrollment paperwork, assemble transcripts and generally, follow all necessary steps involved in informing and enrolling families into the program. Other strategies that may be used include advertising in local community newspapers (particularly those published for minority groups) or contacting community social service organizations that target the at-risk and/or dropout population (youth organizations, courts, churches, etc.). The school will use multi-lingual advertisements and materials when appropriate.

## **2. Explain the plan for admitting students based on a random selection process if more students apply for admission than can be accommodated.**

LEAD Academy requires applicants to submit a timely and complete application form in order to be considered for admission. A random lottery is to be conducted if the number of



applicants exceeds the maximum targeted enrollment. The lottery shall take place within fifteen days after the closing date of the application period. Each student will be assigned a number. Numbers will be written on a piece of a paper (1" by 2") and folded twice. Numbers will be placed in a container and randomly drawn one number at a time by the principal or his/her designee. The lottery will be supervised by at least one member of the sponsoring entity or his/her designee and by a school representative. Results of the lottery shall be certified by a notary public.

***Development of a Waiting List:*** The lottery will be paused momentarily once the number of student names reaches the proposed enrollment cap. Then the drawing will continue and a waiting list will be developed by pulling the remaining names until all names are pulled. As space become available, applicants will be called from the waiting list with the lowest number assignment.

Students accepted will be notified by letter within ten days giving them instructions to call the school and confirm intent to enroll. The School will also call families to notify them of acceptance and to confirm intent to enroll. All attempts to reach the family and if contacted the response from the family will be documented. If the student has not confirmed intent to enroll within two weeks of receiving confirmation of acceptance the student will be placed at the end of the wait-list.

**3. Explain the school's policy regarding enrollment preferences with respect to students who reside within the former attendance area; students within the local school system; students outside of the local school system; previously enrolled students; siblings of students; and children of founders, governing board members, and full-time employees.**

Returning students (students who currently attended the school and intend to return the next school year) are given priority in admission if they notify the school of their intent to return for the next school year by February 1<sup>st</sup> of each school year.

According to Alabama Charter School law the school can give preference to children of founders, governing board members and full-time employees as long as it does not exceed 10% of the total enrollment. The school will adhere to the Alabama Charter School law regarding enrollment preferences within former attendance area, within the local school system, previously enrolled students and siblings of students.

Siblings of returning students will be exempt from the lottery and will obtain automatic admission. Siblings of returning students are required to follow regular admission procedures. However, children of the school's founders and teachers (so long as the total number of students allowed constitutes less than 10 percentage of the total enrollment) will be exempt from lottery requirements.

**4. Provide, as an attachment (Attachment 7), the school's enrollment plan, which should include the school's plan for maintaining records on all enrolled students**

utilizing the state-adopted Alabama Student Information System (ASIM).

## Attachment 7

### **Student Discipline**

Describe in detail the school's approach to student discipline. Provide, as an attachment (Attachment 8), the school's proposed discipline policy. The proposed policy must comply with any applicable state and federal laws and authorizer policies. The description of the school's approach and the proposed policy should address each of the following:

1. Practices the school will use to promote good choices, including both penalties for infractions and incentives for positive behavior.
2. A list and definitions of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively.
3. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings.
4. Procedures for due process when a student is suspended or expelled as a result of a code of conduct violation or disciplinary rules or regulations, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students with disabilities who are expelled or out of school for more than ten days.

## Attachment 8

5. Provide, as an attachment (Attachment 9), how students and parents will be informed of the school's discipline policy.

## Attachment 9

### **Parent and Community Involvement**

1. Describe the role of any parents and community members involved to date in developing the proposed school.

Business leaders, potential community organizations, and elected officials have been contacted to ask for input on what the local community challenges are with regard to

education and what is needed to improve education in Montgomery.

**2. Describe what you have done to assess and build parent and community support for your school and how you will engage parents and community members from the time that the school is approved through opening.**

Individual meetings with parents and community members as well as community meetings were held to inform the community and families of the proposed charter school. We held three town hall meetings and we have met with families in County Downs neighborhood. We have held meetings at rotary club, local church, and a community meeting. We have set up booths at local parks, and Dr. Office. We have gathered over 200 signatures of support from the community. These meetings will continue after the charter is approved until the school opens in fall 2018. Open Houses will take place in the community as well as at the school. Members of the community will be invited to tour the campus and learn more about the school.

**3. Describe how you will engage parents in the life of the school (including any proposed governance roles described in Act 2015-3). Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe any commitments or volunteer activities the school will seek from, offer to, or require of parents.**

Parental involvement plays a vital role in students' academic success and will therefore be essential to the success of LEAD Academy as a school. As required in Act 2015-3 at least 20% of the Board members will be parents of current students. To support parent involvement, communication with parents will be provided in English, Spanish and Korean if necessary. Parents and community members will have extensive opportunities for involvement in School operations. The School will ensure that parents, teachers, and other community members are engaged in the school by offering them the following opportunities for involvement:

- Parent/teacher conferences
- Open houses, Career Fairs, and School events (such as student shows; information sessions; project fairs; club activities; etc.) held in the evenings to maintain communication and encourage involvement in the School
- School Website, monthly newsletters, and event calendars will be updated or distributed monthly to disseminate information and maintain open lines of communication in the community
- Parent Teacher Organization (PTO) will coordinate extra-curricular events and fundraisers involving the community
- PTO will coordinate extra-curricular events and fundraisers involving the community

**Volunteer Opportunities**

Parents will be provided numerous opportunities to volunteer at the School and are required to participate in some way throughout the year in order for their child to remain enrolled. Opportunities may include, but will not be limited to homeroom-parent, field

trips, job fairs, award banquets, teacher appreciation day, etc.

### **Other Parent Involvement Opportunities**

Parent workshops on educational topics, such as decision-making regarding school performance, student assessment needs, and homework help will be offered.

Parent/Teacher conferences, the electronic grade-book, and the School's website will also keep parents informed of progress and important School activities, thereby encouraging parental involvement in the School. Additionally, parent surveys will be distributed annually to monitor general parent satisfaction with the School program.

- 4. Discuss the community resources that will be available to students and parents. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments.**

LEAD Academy will partner with community organizations such as the Civil Air Patrol, Habitat for Humanity, Salvation Army, local hospitals and health care facilities, Salvation Army, etc. The school will be partnering with local businesses and organizations to provide the students with mentors and intern opportunities. We will also be partnering with colleges and universities to offer dual enrollment opportunities for the students. There is a strong support from prospective parents and the community for the proposed school (Attachment-27).

## **Educational Program Capacity**

- 1. Identify the key members of the school's leadership team. Identify only individuals who will play a substantial and ongoing role in school development, governance, and/or management and will thus share responsibility for the school's educational success. These may include current or proposed governing board members, school instructional leadership/management, and any essential partners who will play an important ongoing role in the school's development and operation.**

The key members of the school's leadership team will be comprised of but not limited to the following: Principal, Legal, Assistant Principals, Business Manager, Management Company Liaison, and LEF Board members. After establishment of the proposed school, PTO chair, selected parents, teacher and student representatives play active role for the success of the program. Currently the LEF Board members along with Education Management representative formed a core team and started pre-startup processes. The founding board consists of Charlotte Meadows, Ryan Cantrell, Lori White, and William Green. Dr. Soner Tarim, representing Unity School Services (Education Management Organization), was retained by the LEF Board to provide consulting and school

management services regarding proposed school.

Members of the LEF board have contributed to different parts of this application which match their individual areas of expertise. Our board members have in-depth knowledge and understanding in the fields of education, leadership and policy, curriculum and instruction, developmental psychology, nonprofit finance and governance, and school and real-estate law. Along with the expertise, our team is familiar with the educational needs of students, historical and socioeconomic trends, and the challenges of finding a plot for a school building in Montgomery. Board members are concerned about the scarcity of high-quality schools and are fully committed to supporting LRF's mission of offering a comprehensive, rigorous education program to Montgomery students. We have confidence in our ability to consider and address the multitude of issues related to establishing a successful educational institution.

**Describe the team's individual and collective qualifications for successfully implementing the school design, including capacity in areas such as:**

- **School leadership, administration, and governance.**
- **Curriculum, instruction, and assessment.**
- **Performance management.**
- **Parent and community engagement.**

The team consists of highly qualified, degreed and experienced educators and community stakeholders who support the school's mission and embrace a shared vision for the proposed school. The team will consist of proven and successful thought leaders that have a longstanding reputation as advocates for children and learning.

The LEF has comprised the core leadership team with residents of the district or nearby communities. The school has found individuals who have developed relationships with the community and have direct knowledge of the challenges and needs of the area. The leadership team will seek input to expand the team from local service organizations, business groups and postsecondary institutions.

**Charlotte Meadows** has been an education advocate for the past fifteen years with a single passion – to improve education in Montgomery, Alabama so every student will receive the opportunity to get the best education possible. As a parent of three students in the Montgomery public schools, she was involved as PTSA president for her son's high school and saw the need for more parent participation on the board level. As administrator for her husband's medical practice she observed the resumes of job applicants from the traditional high schools and determined that MPS students were not being educated to the point where they are prepared for a job following high school graduation. Her experiences on the Montgomery Board of Education has led her to her tireless work on behalf of students in the area. She has always believed that there are enough people who care in the community that the problems in the schools can be fixed, albeit with hard work.

Charlotte knows that her educational background and work experience have served to give

her the knowledge and ability to take the next step in each of her roles in life. A 1984 accounting graduate from Auburn University with a Master's Degree in Business in 1989 from University of South Alabama served to prepare her for starting a medical practice in Montgomery in 1991. As a parent she realized the need for a stronger voice from parents on the local board and ran for an open seat. In recent years she used the experiences garnered from the Board of Education term to verbalize the need for education policy changes at the state level. As a member of the local board of education she saw how easily a policy change could impact the entire system for better or worse.

As the outreach director for Students First, a national education reform nonprofit, Charlotte traveled the state to train parents in advocacy and explain the need for a better education system. She has an excellent understanding of student achievement data and believes that data should inform decision-making, including financial decisions. She worked tirelessly to advocate for school choice laws to give Alabama families options for their children, supported the Alabama Accountability Act by explaining the positive benefits to legislators as well as parents and businesses and successfully lobbied for charter school legislation to be enacted. After her job changed to include state policy director, Charlotte was able to work with lawmakers and the Legislative Reference Service to write legislation to reform Alabama's tenure laws. Although the specific legislation did not pass, the networking and knowledge she gained was invaluable, as well as the research experience in reviewing laws from around the country.

Charlotte Meadows will use all of these experiences as well as her broad based knowledge of Montgomery as a 43-year resident of the area and her many contacts in the education, business, political and medical communities to work to make the proposed school a success. She gives 100 percent to every project she begins and will take personal pride in seeing Montgomery's students enroll and subsequently graduate from the first charter high school in the area.

**Ryan Cantrell** received his Bachelor degree in Political Science in 2008 from Faulkner University, where he was also an All-Conference, All-Region golfer and President of the Student Government Association. After graduating college, Ryan went to work for the Alabama Republican Party, first as a Field Director for the Jay Love for Congress Campaign, then as Deputy Political Director, helping to accomplish the first Republican takeover of the State Legislature since Reconstruction. After leaving the ALGOP in 2011, he went to work for the newly elected President Pro Tempore of the Alabama State Senate, Del Marsh, where he served as Policy and Research Analyst.

Ryan has been active in the education reform movement since 2013 when he started working for the American Federation for Children, a school choice advocacy organization that works to ensure that low- and middle-income families have the ability to choose the educational environment that works best for their children. In his current role with AFC, he functions as the lead staff member in five southeastern states, where he creates and oversees state budgets and advocacy activities.

His passion for education comes from his mom, who was a public and private school

teacher, and his dad, who is the Assistant General Director for the Prattville YMCA. Their influence displayed that a great education comes when one focuses on the whole child – not just academic achievement, but also an emphasis on character, integrity and other skills needed to be successful in one’s career. He has a deep-rooted belief that every child has the ability to learn.

Ryan is active in his church, Landmark church of Christ, where he has served as a ministry leader and bible class teacher. He is a diehard college sports fan, enthusiastic golfer and avid book reader. Ryan and his wife have been married for five years and have three children.

**William A. Green, Jr.** is a former U.S. Marine. He graduated from Alabama State University in 1992 with a degree in Accounting. Immediately after graduation, he worked as a stockbroker in Atlanta. After leaving the investment banking industry, he continued his career in investment banking at SunTrust Bank in the mortgaged backed securities department where he designed an award winning computer system to process numerous securities cutting the amount of time to process mortgages from several days to a couple of hours.

It was at SunTrust where William decided to pursue a career in computer consulting. William took a job with Oracle Corporation as a business analyst in 1997. In 2000, William founded William Delaney Consulting specializing in Oracle Financials implementations and staff augmentations. William has implemented financial systems for Fortune 500 companies such as Delta, Motorola and CSX. William Delaney Consulting is currently expanding into mobile development to take advantage of the growing market developing custom mobile applications for small businesses.

As a consultant supporting various Fortune 500 businesses and government entities, William analyzes financial statements and reconciles budgets on a daily business as part of his duties. The experiences acquired through the application of best practices across a wide range of industries in the public and private sector over his 20 plus years of experience makes him uniquely qualified to serve in his position as city councilman in district 5 in the great city of Montgomery Alabama.

William currently lives in Montgomery Alabama. William is an ordained minister at Fresh Anointing House of Worship and is married to Marla Green and is the father to two lovely daughters, Nichole and Spencer Green. Nichole is getting ready for an internship at Google and Spencer, at 3, is plotting to take over the world.

**Dr. Lori White** is an Internal Medicine physician who has been in Montgomery since 1994. She received her Doctor of Medicine degree from Emory University in 1988. Since moving to Montgomery she has worked both as a private practitioner and a hospitalist. Led by her passion for education, she changed her professional course in 2011. Dr. White accepted a position with the UAB Montgomery Internal Medicine Residency program as a teaching attending. As an Assistant Professor of Medicine, she is involved in teaching and supervising resident physicians during their training, as well as, medical students attending

the UAB School of Medicine Montgomery Campus. She serves as the Curriculum Committee Chair, the Acting Internship Clerkship Director and the Inpatient Services Director as part of her position with UAB Montgomery. Lori also serves on the Quality committee, the Clinical Documentation committee and the Mortality and Morbidity committee at Baptist Medical Center South. She has found her teaching position to be exciting, stimulating and highly rewarding as she watches young men and women become our healers of the future.

Dr. White has been an advocate for education for many years. She has participated in tutoring and mentoring programs. In 2010, Lori ran for a position on the Montgomery County School Board. During this time, she reached a new understanding of the need for improved educational opportunities in Montgomery. Her passion to ensure a quality education for all the children in our community has not wavered. She has also worked for change in Montgomery through the campaign of others for school board.

Lori attends and currently serves on the Vestry of St. John's Episcopal Church in Montgomery. She is active on the Outreach and Pastoral Care committees. In the recent past she has been an active board member of Shepherd Staff Ministries and New Beginnings Educational Center. Lori has been married to Dr. Penn White for 29 years and they have 3 children; Wesley 25, Aidan 22, and Olivia 17.

Dr. White's experiences as a physician enforce her belief that the people of Montgomery deserve another choice in education. She sees daily how the health of our community is impacted by the education provided to our students. Lori looks forward to providing a new direction in education through a Charter school that will have a positive impact on our community in many ways including healthcare.

**Dr. Soner Tarim** is the founder and former CEO of Harmony Public Schools (HPS), a Houston based charter network in Texas. Dr. Tarim has been working with the LEF founding board members to develop the proposed school. He has been an educational advocate for more than 30 years. He has championed the cause of imparting knowledge to the children belonging to disadvantaged groups. Dr. Tarim was the first principal at Harmony Houston serving 200 students. Under his leadership, HPS is now serving nearly 34,000 students at 54 campuses throughout Texas.

Dr. Tarim is a driving force behind disseminating STEM education throughout Texas and the United States. He has decades of experience of developing innovative educational programs for K-12 schools for the Harmony group of schools, which has garnered state and national recognition for its high academic standards. Under Dr. Tarim's leadership, Harmony has earned the reputation of one of the best charter schools in the country (Broad Prize Finalist 2017). Many of its campuses have found a place in prestigious high school rankings such as News & World Report and Children-at-Risk.

Dr. Tarim holds a Ph.D. from Texas A&M University and is a trained biologist and ecologist. He has taught courses in biology, ecology, general science, and physical education at the high school, college and graduate-school levels, spearheaded scientific symposiums, international science competitions and Olympiads. Dr. Tarim was declared Charter School



Leader of the year at the Annual charter school conference in October 2017. Currently, he is a Pahara-Aspen Institute Education Fellow. Dr. Tarim has also been selected as a fellow to attend a year-long program at the Broad Foundation Academy which brings together passionate and renowned leaders who are dedicated to transform the school system so that every student receives a world-class public education.

**2. Identify any organizations, agencies, or consultants that are partners in planning and establishing the school, along with a brief description of their current and planned roles and any resources they have contributed or plan to contribute to the school's development.**

The LEF board members will be working with Dr. Tarim representing Unity School Services, an Education Management Organization, to established proposed school. Dr. Tarim personally supervised and managed establishment of more than 50 charter schools in Texas and around the nation. Dr. Tarim and his team at Unity School Services will provide day-to-day management services to the school as well as provide all curriculum, technology and non-instructional related aspects of the schools such as security, custodial, marketing and procurement assistance.

**3. Identify the principal/head of school candidate and explain why this individual is well qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence that demonstrates capacity to design, launch, and manage a high-performing public charter school. If the proposed leader has never managed a school, describe any previous leadership roles or leadership training programs that (s)he is currently participating in or has completed. Also provide, as an attachment (Attachment 10), the qualifications, resume, and professional biography for this individual. Discuss the evidence of the leader's ability to effectively serve the anticipated population.**

No Candidate has been identified at this time.

### **Attachment 10 (N/A)**

**If no candidate has been identified, provide, as an attachment (Attachment 11), the job description or qualifications, and discuss the timeline, criteria, and recruiting and selection process for hiring the school instructional leader/administrator.**

### **Attachment 11**

**4. Describe the responsibilities and qualifications of the school's leadership/management team beyond the principal/head of school. If known, identify the individuals who will fill these positions and provide, as an attachment (Attachment 12), the qualifications, resumes, and professional**

**biographies for these individuals. If these positions are not yet filled, explain the timeline, criteria, and process for recruitment and hiring.**

No one was hired at this time. However, the following positions will be created and hired after approval of this charter according to the staffing plan outlined in Attachment-17. The Board of Directors of the LEF believes that the quality of the professional staff determines the quality of education offered in the School. It is therefore the responsibility of the School Principal to locate, recruit and hire the best qualified administrators, teachers, and staff to meet the School's educational needs.

The recruitment will start by advertising at local newspapers, school web site and other teacher/ staff recruitment web sites, if necessary local radio stations as well. The principal will select from this pool of applicants a list of candidates who meet the minimum requirements. Principal may also recruit specific individuals who come to his/her attention and who possess experience or expertise considered especially valuable to the school. The principal will call candidates and arrange an interview. The first interview will consist of conversation and a question and answer exchange. General provisions of all contracts and benefits will be provided to the candidates. The principal shall use an interview score sheet for each candidate and follow a preset question format to ensure a standardized and fair process. Principal may request the second interview for some candidates before making decision to offer the position. References will be taking into account as well. Principal then shall offer the best candidate an employment contract (see Attachment-12 for additional leadership positions).

## **Attachment 12**

## SECTION 2. Operation Plan & Capacity

### Governance

#### Legal Status and Governing Documents

**Describe the proposed school’s legal status, including 501(c) 3 non-profit status and federal tax-exempt status. In an attachment (Attachment 13), provide proof of 501(c) 3 non-profit status and federal tax-exempt status (or copies of filings for the preceding items). Also, include as an attachment (Attachment 14) any governing documents already adopted, such as board policies.**

The Board of Directors of the LEAD Education Foundation (LEF) will provide the governance function which encompasses legal responsibilities, general oversight, planning, policy-making and fiduciary obligations. The board members will carry out their statutory responsibilities associated with operating the proposed charter school in an efficient and ethical manner in compliance with local and all other applicable state and federal laws and regulations.

The LEF has filed the 501(c)(3) application with the IRS as a tax-exempt organization for the sole purpose of organizing and operating an Alabama charter school (Attachment-13). The School is a non-profit corporation formed and organized under the applicable laws of the State of Alabama. The School will be designated as an educational organization under Section 501 (c)(3) of the Internal Revenue Code. The Board of Directors LEF will inform the sponsor upon approval of our exemption status.

Although the Board has the ultimate authority regarding the school operations, no member of the Board will be involved in the day-to-day operation of the school. The Board will approve budgets, set policy, establish and approve procedures, select and engage the management company (Unity School Services), hire a Principal, ensure that the financial and administrative management of the school meets regulatory requirements, maintains sound fiscal standards, and remains financially viable, and ensure compliance with Alabama laws and terms of the Charter Contract, review the Principal’s job perform, contract for the annual financial/compliance audit, comply with Alabama’s public records and open meeting laws.

The Board of Directors will specifically review and monitor student achievement performance data, monthly financial statements, facility and personnel issues. All members of the Board of Directors will abide by statutory requirements including signing “Conflict of Interest” statements and clearing criminal background checks. The Board of Directors of

LEF adapted by-laws that govern the Board and the School and all actions taken will be consistent with those by-laws.

## **Organizational Chart**

**Submit, as an attachment (Attachment 15), an organizational chart that clearly presents the school's organizational structure, including lines of authority and reporting between the governing board, staff, and any related bodies (such as advisory bodies or parent/educator councils) and any external organizations that will play a role in managing the school.**

The organizational chart should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the governing board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that will play a role in managing the school. The organizational chart should also document clear lines of authority and reporting within the school.

### **Attachment 15**

## **Governing Board**

- 1. Explain the governance bylaws that will guide the board, including the nature and extent of involvement by key stakeholder groups. Provide the governing board's bylaws as an attachment (Attachment 16).**

### **Attachment 16**

- 2. Describe the governance structure of the proposed school, including the primary roles of the governing board and how it will interact with the principal/head of school and any advisory bodies. Describe the governing board's size, current composition, and desired composition; powers; and duties. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that (a) the school will be an educational and operational success; (b) the board will evaluate the success of the school and school leader(s); and (c) there will be active and effective representation of key stakeholders, including parents.**

The LEAD Education Foundation will be the governing board of the proposed school. The Governing Board, in collaboration with the EMO (Unity School Services) and the Principal, will be responsible for the organization and control of the school and is empowered, with consideration to the boundaries of federal and state statute, to determine the policies necessary for the effective operation and general improvement of the school. The Board

will be a public entity and may take action only during a meeting in official public session, when a quorum is present. The Principal shall serve as the primary reporting official and shall prepare information requested by the Board. The Principal shall also prepare and report all activities of the School requiring board notification or decision. The Principal shall deliver reports on the financial and academic operations of the School at each regularly scheduled Board meeting or more frequently, as requested.

The School's on site administration (principal, assistant principal, and/or lead teacher) will ensure that the operations of the School (resources, courses, policies) are in accordance with the mission and vision of the School as adopted and approved by the Governing Board. The administrative staff, as instructional leaders, will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the School. The faculty and secretarial staff will be responsible for carrying out these procedures in their daily activities and interactions with students, parents and the community.

The President: She/he shall preside at all meetings of the school and at all meetings of the Board of Directors. She/he shall appoint committees except as otherwise provided in the By-Laws. She/he shall carry into effect all orders and resolutions of the Board of Directors and serve for one year.

The Vice-President: shall, in the absence of or disability of the chairman performs the duties and exercises the powers of the chairman and performs such duties as the Board of Directors or the chairman shall prescribe.

The Secretary-Treasurer: of the school shall be responsible for maintaining safe custody of all corporate funds and securities as prescribe in the proposed By-Laws.

The Principal or Executive Director (ED): The policies of the board and its directives will be executed under the directions of the principal. The principal will be in charge of the day-to-day operation of the school and report to the board monthly. The principal works with consultants regarding accounts payable and receivable as well as payroll. He/she oversees all staff members.

The corporation shall be governed by the Alabama-not-for-profit Corporation Law, or under such successor provisions as may be in effect from time to time. No part of the net earnings of the corporation shall go to the benefit of, or be distributable to its members, trustees, officers or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the proposed By-Laws, and notwithstanding any other provisions of these By-Laws.

The Board will appoint a representative to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes. The representative will reside in the school district in which the charter school is located and will be a governing board member, charter school employee, or individual contracted to represent the governing board. The representative's contact information will

be provided annually in writing to parents and posted prominently on the school's website.

Individual members of the Board have authority to take official action only when sitting as a member of the Board in public session, except when the Board specifically authorizes the member to act. The Board shall not be bound in any way by any action on the part of an individual board member or an employee, except when such statement or action is in compliance with the public action of the Board. The Governing Board of the school is a highly talented, caring group of educators and individuals. The combination of their relevant professional experience, history of community involvement, and demonstrated commitment to education and the school is an integral component to meeting the needs and wants of not only the students and staff, but also their families and the surrounding community. The Governing Board will be the governing authority and policymaker for the school. The Governing Board continually assesses the school, analyzing student, financial health, and school performance data, and thereby making data-driven decisions for school improvement on behalf of the students. The Charter School's governing body's foundation is supported by written policies and procedures reviewed and modified at the Board's annual meeting.

The Board of Directors will not be involved in the day-to-day leadership or administration of the School, and will empower the principal with these duties. Specifically, the responsibilities of the Board shall include:

- Approval of operating policies and procedures
- Selection and engagement of the management company
- Compliance with Alabama laws and terms of the Charter
- Selection of Principal or Executive Director
- Review of Principal's job performance and professional development goals
- Review and decision on appeals of student disciplinary decisions
- Audit review and compliance
- Compliance with Alabama's Public Records and Open Meeting Laws
- Documenting minutes, Board of Directors' actions, and approval of policies
- Members of the Board of Directors will not have authority except as a whole and will not, as individuals, exert undue influence over staff except as defined in the Board's policies. Details on these policies can be found in the By-Laws.

**Additional Board Responsibilities shall include, but not be limited to:**

- Annual operating budget adoption
- Oversight over School operations to assure implementation of the mission and vision
- Ensuring that the school has retained the services of a certified public accountant (CPA) or auditor for the annual financial audit
- Reviewing and approving the audit report
- Participating in governance training
- Reporting School progress annually to the Sponsor
- Development and approval for all School policies
- Raising funds from the private sector to supplement the School's public funds
- Compliance with laws and terms of the Charter Agreement
- Legal documentation

- Approval of personnel recommendations
- Negotiation and approval of all contracts, unless authority delegated for certain agreements
- Appeals for student discipline
- Compliance with Alabama's Public Records and Open Meeting Laws
- Maintenance of a "Board Book" documenting minutes, Board actions, and approvals

The Governing Board shall also be responsible for ensuring that the School has retained the services of a Certified Public Accountant or Auditor for its annual financial audit. This audit will be submitted to the Governing Board. The Board will review and approve the audit, or make recommendations for any financial recovery plan. If this situation arises, the Board will monitor any recovery or corrective action plan to ensure the school is complying with the plan.

### **Responsibilities of Individual Members of the Board**

Individual members of the Board shall be responsible to prepare for and attend Board Meetings and participate in Board discussions providing opinion, counsel, and advice. Individual Board Members shall participate in votes of all matters pertaining to the Board when in attendance at a Board Meeting unless a conflict of interest may exist and that conflict has been fully disclosed to other Members of the Board. Individual Board Members may not contract or speak on behalf of the School unless specifically authorized to do so by the Board as a whole or unless the Bylaws permit. The Board will receive governance training in accordance with the Alabama Charter School Law providing a core base of knowledge about the Board's roles and responsibilities and Alabama charter school law. Governing statutory obligations, legal liabilities, organizational documents, policies and procedures, financial responsibilities, government law, public records law, conflicts of interest and ethics, and running effective meetings are training subject matters. Included as Board responsibilities are the financial oversight of the School including preparation, review and amending (if necessary) an annual budget for the school; development of short- and long-term plans for sustainability and growth; commitment to ensuring newly elected board members agree to support the founding vision of the school to maintain continuity between boards. The Principal, together with the Educational Management Organization, are responsible for the administration of policies, approval of the budget, creation of the calendar, awarding diplomas.

### **The responsibilities of the Board officers are as follows.**

#### **Board Chair:**

- Preside at all meetings of the Board
- Sign contracts and/or other documents
- Establish Board committees
- Call emergency meetings of the Board, as necessary
- Enforce parliamentary procedures
- Communicate Board policy to the management organization

#### **Secretary:**

- Record and distribute Board meeting minutes
- Publicly advertise meetings, in accordance with state regulations
- Oversee, announce, and record all motions and voting results

**Treasurer:**

- Oversee financial policy issues
- Consult with management organization on all financial matters
- Sign checks for board according to appropriate procedures

**Board Committees**

The Board will appoint at least two (2) working committees.

- A. *Finance Committee:* Monitor and report on the business operations of the School including reviewing financial reports and statements, providing primary contact with the auditing firm, and reporting on the status of the School’s financials to the full Board and the broader school community. This committee will also ensure compliance with key measures of the accountability plan, if necessary.
- B. *Personnel Committee:* Participate in selection and evaluation of the Head of School.

**3. List all current and identified board members and their intended roles. Summarize members’ interests in and qualifications for serving on the school’s governing board. Provide full resumes regarding the expertise and background of the proposed founding governing members.**

- Charlotte Meadows Resume
- Ryan K. Cantrell Resume
- Lori White Resume
- William Green Resume

**4. If the current applicant entity or interest group does not include the initial governing board, explain how and when the transition to the formal governing board will take place.**

N/A

**If this application is being submitted by an existing non-profit organization, respond to the following:**

- a. **Will the existing nonprofit board govern the new school, or has the school formed a new non-profit corporation governed by a separate board?**
- b. **If the non-profit’s current board will govern the charter school, what steps have been taken to transform its board membership, mission, and bylaws to assume its new duties? Describe the plan and timeline for completing the transition and orienting the board to its new duties.**
- c. **If a new board has been formed, describe what, if anything, its ongoing relationship to the existing non-profit’s board will be.**



N/A

**5. Explain the procedure by which governing board members have been and will be selected. How often will the board meet? Discuss the plans for any committee structure.**

The current founding board members will recruit additional Board members according to the bylaws of the LEF. They will seek individuals who are upstanding and recognized advocates for children in the Montgomery County area. The founding board will include in this search, parents of students who will be enrolled in the school as well as other community members who have a demonstrated acumen in education, finance and community service. The board will meet on the second Monday of each month unless otherwise determined by a vote of the board that meetings will not require. Committee meetings will be held 2 hours prior to the public regular meeting. All school administrative personnel will be expected to attend every meeting. The president of the board and Head of School will be responsible for the preparing the agenda. Meetings will be posted on the school's website as well as minutes from previous meeting which will be archived and available for review online. The school will also have standing committees that include but are not limited to the following: Curriculum/Instruction, Finance, Buildings and Grounds, Discipline and Personnel. The president of the board will assign committee assignments to the other board members and will be for a term of 1 calendar year.

**6. Describe how the governing board will provide evidence of its compliance and adherence to the Alabama State Ethics Law, Open Meetings Act, Public Records law, and all other specific state laws referenced in Act 2015-3, if applicable.**

The governing board will receive professional development training regarding the expectations of public officials as referenced by the Alabama State Ethics Law. The school will abide all state ethics laws and Public Records regulations as outlined in the Code of Alabama and as enforced by the Alabama State Ethics Commission. Evidence will be provided by transparent and outward availability of those items required by law by the completion of state forms and will have those forms onsite for public inspection. The school's commitment to hold monthly public meetings and advertise those meetings by prominently posting notices in a convenient location so that the public may see the schedule will be strictly enforced. Also, the administration will notify members of the public and media either by mail, email or text of impending meetings of the quorum of the board. Likewise, the school will maintain a website that includes dates, times, locations and agendas of meeting of the whole board. The board will adhere to all aspects of the opens meeting act and will not convene unadvertised special meetings of the board. Minutes of the meetings will be posted on the school's website.

**7. Identify any existing relationships that could pose actual or perceived conflicts of interest if the application is approved. Discuss specific steps that the governing board will take to avoid any actual conflicts and to mitigate perceived conflicts.**

There are currently no existing relationships that can be identified as actual or perceived

conflicts of interest. Founding board members are not paid employees or contracted in anyway either directly or indirectly. No board member currently or in the future may experience any financial gain nor can any member of his or her immediate family receive payment. Immediate family will have defined as husband, wife, father, mother, son, daughter, niece, nephew, brother, sister, uncle or aunt. Disclosure documents will be in accordance with the Alabama State Ethics Law. All employees, board members, or other individuals will be required to view Alabama Ethics Training Video, which requires interactive participation. In order to receive credit for watching the video all individuals must watch the entire video and must complete the form that appears after the video.

**8. Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added? How will vacancies be filled? What are the priorities for recruitment of additional board members? What types of orientation or training will new board members receive, and what type of ongoing development will be existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation. If there will be a network-level board, identify any board development requirements relative to the organization's proposed growth and governance needs.**

The board will grow as follows: The founding board members recruit new members until August 2018 at which time each founding member will nominate prospective board members to be appointed to the five-member governing board. Trainings for governing members will be ongoing through a series of informational and professional development seminars. They will be conducted either as part of the monthly open meetings or prior to committee meetings. Additional training will be provided the board through attendance at state and national workshops provided by recognized authorities and experts. Members will also participate in webinars and videoconferences. Governing board members via a process of nomination and selection will fill vacancies on the board by majority vote. Vacancies will be posted via the school's website and prospective candidates from the Montgomery community may apply. The board may choose to interview applicants and nominees. New board members will receive an in-depth training by reviewing with administration and staff, which includes but is not limited to the following:

## **New Board Member Training**

### **1. General Charter School Information**

- Board committees
- Board Meetings
- Committee meetings
- Informed Decision making –seek information, data, and what is best for students
- Respect and trust – Be open, honest and direct. Take time to learn, seek information and advice from staff, ask thoughtful questions, and listen prior to making decisions.
- Public complaints at Board meeting
- Conflict of Interest
- Distribution of Materials

- Email Distribution of Board agendas & backup
- Monthly Board memo and activities
- Board policies available on our website
- ESSA has replaced NCLB – Explanation of State Assessments

## **2. Board Member role & responsibilities**

- Confidentiality - remember, some things we discuss are confidential. Executive session is always confidential. Student matters, legal matters, personnel issues – always confidential.
- Establish School goals, adopt policy, adopt budget and oversee resources, hire and fire personnel.
- Head of School role: the board's principal advisor – 5:1 – identifies operational needs and recommends policies for board action.
- Head of School carries out the goals of the School and make the day-to-day decisions that affect the operation of the school.
- Valuable resources – Board President, Vice President and other board members, the Head of School, charter school website.
- Board member's role when problems with administrator or staff – raise concern with Head of School in private or executive session, take care not to cross the line into micromanaging the situation – it's the Head of School's job to lead and manage employees.

## **3. Communication Key to Understanding**

- Open communication with Head of School – contact with questions and concerns especially prior to board meetings- communicate via phone calls, email, text...
- Chain of Command – keep in mind if someone brings a concern to you – redirect person to contact appropriate level personnel – teacher, building principal, Head of School.
- Open Meetings Law – board members prohibited from gathering to deliberate or take action on School business in an unadvertised meeting.
- Refrain from discussing school board business other than items that have been discussed and made public at a board meeting (other business that is discussed in executive session relates to confidential matters – such as personnel or student discipline)
- Confidential information includes employee personnel issues, student information, employment, performance evaluations, collective bargaining agreements and negotiations, real estate and property, and litigation.
- Separating your role as board member and parent –
- Questions from the Media – spokesperson
- Respond to reports from community about staff misconduct
- Use of email and social media with board colleagues

## **4. School Law and Finances**

- Funding of Public Charter Schools – local, state & federal revenues
- Budget
- Budget Projections
- Technology

## Advisory Bodies

**1. Describe any advisory bodies or councils (e.g., parent and educator councils) to be formed, and include the roles and duties of any such body. Describe the planned composition of each advisory body; the strategy for achieving that composition; the role of parents, students, and educators (if applicable); and the reporting structure as it relates to the school's governing body and leadership.**

A community advisory board will be appointed by the board and will include three parents, three students, two staff members, and one administrator, three community members (at least one from a local college or university). The duties of this board are to advise the board on issues pertinent to the school that have an impact on student achievement, safety, school climate and school's mission. The school will also have a professional advisory board to assist in the authentic learning model whereby students earn certificates, licenses, diplomas or degrees in their chosen personal career or educational plan. The size and makeup of the boards will be determined by the governing board and will take place at the August, 2018 meeting.

## STAFFING

### Staff Structure

**Provide, as an attachment (Attachment 17), a complete staffing chart for the school. The staffing chart and accompanying notes or roster should identify the following:**

- a. Year 1 positions as well as positions to be added in future years.**
- b. Administrative, instructional, and non-instructional personnel.**
- c. The number of classroom educators, paraprofessionals, and specialty educators.**
- d. Operational and support staff.**

### Attachment 17

**Explain how the relationship between the school's leadership/administrative team and the rest of the staff will be managed.**

The Board of directors believes that the quality of the professional staff determines the quality of education offered in the School. Therefore, the EMO and the school Principal are responsible to locate, recruit and hire the best qualified teachers to meet the school's educational needs. All core subject area teachers will be highly qualified in the subject that they teach.

The recruitment will start by advertising at local newspapers, the school web site and other teacher/ staff recruitment web sites, if necessary, local radio stations as well. Additionally,

we will reach out to local university education departments to recruit qualified personnel. Candidates will be asked to submit a cover letter that states their qualifications and their educational philosophy (if applicable), as well as a resume and names of three professional references, possibly online.

The culture is characterized by collaboration and a sense of community. The School leadership and staff will hold one another accountable to high expectations for professional practice. The staff will demonstrate a commitment to shared values and beliefs about teaching and learning and shared decision making during weekly team meetings. This commitment will always be reflected in communication among leaders and staff. Leaders and staff will deliberately and consistently align their decisions and actions toward continuous improvement to achieve the school's mission. They will encourage, support and expect all students to be held to high standards.

The LEF Board will adopt a policy to provide an accessible and fair procedure for the reporting and resolution of legitimate employment-related concerns of, or conflicts between, school employees in a timely and equitable manner. The intent of this process is to support communication and dialogue among staff, to encourage internal resolution of conflicts between staff/staff and administration/staff in a safe environment, at the lowest appropriate level, and to clarify the roles of administration and counsel in dispute resolution. All grievances and disputes shall be processed as provided in a policy. Upon approval, the school will develop this policy. This policy should address the terms and conditions of employment for the affected employee or their recognized representatives.

## **Staffing Plans, Hiring, Management, and Evaluation**

- 1. Explain the relationship that will exist between the proposed school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts. Provide, as an attachment (Attachment 18), any personnel policies or an employee manual if developed.**

The nature of the employment relationship is "at-will." This means that at the sole discretion of either the Employer or employee, the relationship may be terminated with or without cause and with or without notice. The school will draft and execute an at-will agreement with employees. Continued employment under at-will agreement is within the sole discretion of the school/Employer, and the Employer may terminate the employment of the Employee at any time, for any reason or for no reason, so long as the reason is not an illegal one. The Employee shall have no expectation of continued employment, either during or after the term of the at-will agreement, and no expectation of a property interest in his or her employment with the Employer under the Agreement. The Employee shall have the right to resign his or her employment at any time.

### **Attachment 18**

**2. Outline the proposed school’s salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system. Explain the school’s strategy for retaining high-performing educators.**

Proposed Salary Schedule		
Positions	Salary Range	Benefits*
Principal	\$80,000-\$110,000	Full Benefits
Assistant Principals/Administrators	\$50,000-\$75,000	Full Benefits
Administrative Assistants	\$25,000-\$45,000	Full Benefits
Teachers (Sp. Ed./ESL, etc.)	\$35,000-\$60,000	Full Benefits
Counselor/Social Worker	\$40,000-\$55,000	Full Benefits
Librarian	\$30,000-\$45,000	Full Benefits
* =LEF Board may alter/revise these benefits. Benefits include; Health Insurance, and teacher retirement		

Compensation shall include but not be limited to all wages, base pay, stipends, bonuses, and benefits. The Board will ensure the school has clearly defined policies; processes and procedures ensure that school leaders have access to, hire, place and retain qualified professional and support staff. The Board will continuously monitor the employee benefits levels, salaries, and other factors to ensure that all high-quality employees remain on the job.

**3. Describe the proposed school’s strategy, plans, and timeline for recruiting and hiring the teaching staff. Explain other key selection criteria and any special considerations relevant to your school design.**

Recruitment and hiring will include a national search, including referrals from Board members, job postings in Education Week, Social Media and online job sites. The school will also form strong partnerships with local universities to maximize the number of highly qualified candidates. The steps in the hiring process will generally include the following steps, but may be modified slightly for particular positions:

- The management company (Unity School Services) will screen all of the applicants designated in his area of the organization chart, and will select the candidates for the first round of interviews.
- The leadership team will interview the first round candidates. The candidates will be asked a series of questions. The candidates will be evaluated according to the evaluation tool.
- The candidates that score the highest will be called back for second round of interviews. The second round of interviews will focus on having the candidates perform job related tasks. The leadership team will evaluate the candidates according to their ability to perform the job related tasks.
- If the leadership team believes that the candidates have the core values of the

organization, and are able to perform the job related tasks with excellence, the administration will bring the candidates to the HR committee.

- Background and extensive reference checks will be conducted.
- Upon the return of a successful background check the candidates that are brought before the committee will be reviewed according the evaluation tool from the first round, and the job performance tasks from the second round. If the committee feels confident that the employee meets the standard of excellence to be an employee of the school, the committee will bring the recommendation to the Board.

Hiring Timeline- February 2018 - March 2018 post positions and interview positions, April 2018 - June 2018- candidate selection and Board approval.

**4. Act 2015-3, Section 9. (e)(1). Provide an assurance that public charter schools shall comply with applicable federal laws, rules, and regulations regarding the qualification of teachers and other instructional staff. In accordance with subsection (a), teachers in public charter schools shall be exempt from state teacher certification requirements.**

- **Approaches to earning Alabama Educator and/or Leadership Certification for individuals working in conversion public charter schools or start-up public charter schools are the same as those for individuals in the public local education agencies of Alabama.**
- **After approval of a public charter school, a certification specialist at the Alabama State Department of Education (ALSDE) will be available to help the school's human resource department to provide assistance with certification approaches and/or questions just as they do with local education agencies and registered private schools in Alabama.**

The proposed school will comply with all applicable federal laws, rules, and regulations regarding the qualifications of teachers and other instructional staff. We acknowledge that, after approval, the teachers will be exempt from state teacher certification requirements. The school acknowledges that the approaches to earning Alabama Educator and/or Leadership Certification shall be the same as those for individuals in the public local education agencies in Alabama.

**5. Outline the school's procedures for hiring and dismissing school personnel.**

Recruitment and hiring will include a national search, including referrals from Board members, job postings in Education Week, Social Media and online job sites. The school will also form strong partnerships with local universities to maximize the number of highly qualified candidates. The steps in the hiring process will generally include the following steps, but may be modified slightly for particular positions:

The management company (Unity School Services) will screen all of the applicants designated in this area of the organization chart, and will select the candidates for the first round of interviews.

- The leadership team will interview the first round candidates. The candidates will be asked a series of questions. The candidates will be evaluated according to the evaluation tool.
- The candidates that score the highest will be called back for second round of interviews. The second round of interviews will focus on having the candidates perform job related tasks. The leadership team will evaluate the candidates according to their ability to perform the job related tasks.
- If the leadership team believes that the candidates have the core values of the organization, and are able to perform the job related tasks with excellence, the administration will bring the candidates to the HR committee.
- Background and extensive reference checks will be conducted.
- Upon the return of a successful background check the candidates that are brought before the committee will be reviewed according the evaluation tool from the first round, and the job performance tasks from the second round. If the committee feels confident that the employee meets the standard of excellence to be an employee of the school, the committee will bring the recommendation to the Board.

In the event an employee is not fulfilling the expectations of the job description, the School will implement progressive discipline procedures. The steps involve counseling employees, providing professional development and support, and evaluating the employee's performance. If, despite all attempts to assist the employee, he/she is not meeting the expectations of his/her job description, then the School will follow due process. If a determination is made to proceed with termination, the school will conduct a human resources review, and legal review to ensure the proper procedures have occurred and the school is in compliance with all applicable laws and regulations.

- 6. Include a statement acknowledging the school's understanding of the ALSDE, Educator Certification Section, criminal history background check process and, if approved, the school's plan to comply with this process. Information can be found at [www.alsde.edu/EdCert](http://www.alsde.edu/EdCert) (Background Clearance).**

**Act 2015-3, Section 9(d)(1).**

**Public charter schools shall be subject to the same civil rights, health, and safety requirements, including, but not limited to, state and local public health and building codes, employee fingerprinting, and criminal background checks applicable to other public schools in the state except as otherwise specifically provided in this Act.**

The Board of Directors of LEF acknowledges an understanding of the ALSDE, Educator Certification Section, and criminal background check process. The proposed school agrees to comply with this process. The school will be subject to the same civil rights, health, and safety requirements, including, but not limited to, state and local public health and building codes, employee fingerprinting, and critical background checks applicable to other public schools in the state of Alabama.

- 7. Explain how the school instructional leader(s)/administrator(s) will be**



**supported, developed, and evaluated each school year. Provide, as an attachment (Attachment 19), any leadership evaluation tool(s) that already exist(s) for the school.**

The administration will be evaluated using a collaborative quality tool. The tool is a holistic school needs assessment designed to measure school strengths and areas of improvement across research based on quality schools. The process collects and analyzes multiple pieces of evidence in order to answer five key questions:

- How good are the school's organizational structures and systems set up to maximize school improvement efforts and change? (Leadership)
- How well does the school promote and foster a positive culture and climate focused on improved outcomes for all students? (Positive Culture & Climate)
- How well does the school meet, and adapt to, the needs of diverse learners by providing individualized, differentiated curriculum, instruction, and assessments that are tailored to meet student needs and allow them to succeed? (Instruction, Curriculum, and Assessment)
- How well are resources used within and outside the school to meet the diverse needs of all students? (Student, Family, and Community Connections)
- How well are the school's systems and structures set up to provide high quality job embedded learning experiences for all staff? (Professional Learning)
- The tool will help aid the leadership team in the following ways:
- Build capacity of school's leaders to implement annual quality analysis reviews and embed a data-driven cycle of continuous improvement
- Identify underlying beliefs, attitudes, values and expectations that drive decisions and behaviors Highlight school strengths and identify school staff that can be better leveraged for improvement efforts
- Identify short & long-term strategies in an action plan that will serve as a framework for identifying priorities and monitoring progress.

## **Attachment 19**

**8. Explain how educators will be supported, developed, and evaluated each school year. Provide, as an attachment (Attachment 20), any educator evaluation tool(s) that already exist(s) for the school.**

The Principal will conduct performance evaluations for all teachers. Evaluation results will be based on data from formal, walkthroughs, and informal observations, reviews of evidence/artifacts of student learning, and levels of student performance. Based on the 2013 Danielson Framework included in Attachment-20, an observation schedule will be created to ensure compliance with the minimum number of observations based on the state's teacher observation requirements. The Danielson framework is comprised of four critical domains (1) Planning and Preparation, (2) The Classroom Environment, (3) Instruction, and (4) Professional Responsibilities. Observations will be scheduled in a manner that allows for the employee to understand how the evaluation tool will be used, the development of a professional growth plan for the employee, review of observations conducted, and post-conference with the employee.

## Attachment 20

### **9. Explain how the school intends to handle unsatisfactory instructional leadership/administrator or educator performance, as well as instructional leadership, administrator, and/or educator changes and turnover.**

The school will create a leadership pathway to address Instructional leadership, administrator, and/or educator changes and turnover. The Pathway is rooted in both best practices in collaborative professional learning, as well as best practices in developing leadership skills in an academic environment. The Teacher Leader Model Standards are at the core of our Leadership Pathway and serve as our guiding principles. The pathway roles and responsibilities build upon the Teacher Leader Model Standards competencies and facilitate professional growth so teachers and staff can grow as Instructional leaders.

In the event an employee is not fulfilling the expectations of the job description, the School will implement progressive discipline procedures. The steps involve counseling employees, providing professional development and support, and evaluating the employee's performance. If, despite all attempts to assist the employee, he/she is not meeting the expectations of his/her job description, then the School will follow due process. If a determination is made to proceed with termination, the school will conduct a human resources review, and legal review to ensure the proper procedures have occurred and the school is in compliance with all applicable laws and regulations.

## Professional Development

### **1. Identify the person or position responsible for professional development.**

The school leadership team consist of Principal and Assistant Principal will be responsible for the professional development. The Principal will work with the school management company (Unity School Services), to develop yearly staff training and professional development to ensure effective professional development and ongoing support.

Professional development is extremely important for teachers, as they get to acquire new skills to perform their job in a much better way. It helps them a lot in becoming qualified as well as proficient in their jobs. The professional development of the teachers helps them in attaining the goals and objectives of the school and they become more aware and qualified to perform their responsibilities in difficult situations. The principal of the school helps in creating a supportive environment in which the teacher can improve their professional practice. Here are three main roles that administrators play to help shape the structural and cultural context so that the professional development of the teachers can facilitate:

**1) Communicator:** The administrators accomplish much of their regular work through verbal interactions as well as interpersonal communications. The administrators set high expectations for professional practices. The administrators are in such an organizational position that through their daily interactions with teachers, s/he helps in creating a collective view of professional self-efficacy emphasizing how improved classroom practices and teacher learning can affect student learning. Also, the administrators empower the teachers by listening, acknowledging their expertise, experiences as well as professional autonomy. These are important to a healthy professional learning community and development.

**2) Supporter:** The school administrators play an essential role in providing support for professional development of the teachers. There are times when the administrators offer financial support for things such as study materials, conferences as well as program budgets. Also, it is often when they offer other types of support such as creating a learning environment in which teachers get to experiment with new ideas and practices, take risks and exercise creativity. The administrators provide psychological, professional and emotional support as the teachers stretch their pedagogical skills.

**3) Manager:** There are a variety of managerial tasks that the administrators do for the professional development of the teachers. Some of these tasks are;

- Coordinating professional development activities
- Scheduling time and opportunities for teachers so that they can learn and work together
- Aligning available incentives with professional development priorities
- Visiting classrooms
- Acting as barriers against the debilitating external forces that threaten the learning environment of the school
- Developing as well as implementing teacher evaluation practices that help in professional development

**2. Discuss the components of professional development and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally or externally and will be individualized or uniform.**

We believe that professional development opportunities provide teachers the skills to maximize student learning. Thus, LEAD Academy will make every effort to provide the best possible professional development opportunities for teachers. Professional development will be essential in core subject areas and will be emphasized throughout the school year. Professional Development designed by Unity School Services and delivered by the school will be rooted in inquiry-based learning experiences. The Inquiry-Based Blended Learning Model relies upon the idea that individuals are able to learn by investigating scenarios and problems, and through social experiences.

LEAD Academy administrators will bring colleagues, mentors, and outside experts to the

school to provide up to date and research based professional development. Faculty and staff will also be encouraged to participate in professional development workshops at outside educational Institutions and online webinars. The principal will be committed to the pursuit of new and innovative instructional strategies that support the philosophy of the school.

### ***Staff Development Model***

LEAD Academy teachers will be trained on the following instructional practices to deliver quality education for all students. The model includes instructional management and behavioral management practices; a) Bloom's Taxonomy, b) Motivation and Reinforcement Theories, c) Lesson Cycle, d) Cooperative Learning, e) Project Based Learning (PBL), and f) Technology Integrated learning (using current technology in the classroom). Training on those practices will be delivered in campus wide in-services throughout the year. Teachers will attend the related workshops at outside educational institutions to establish the skills.

There will be two main components of the professional development programs. These components are A) Workshops/In-Service Programs and B) a Mentoring Program that will be developed by the school.

#### ***A) Workshops/In-service Programs:***

Every year, all faculty members and administrators will be required to attend designated professional development workshops and seminars hosted by the school and the outside educational institutions. Minimum yearly credit/hour requirements will be as follow:

##### **Administrators:**

- At least 24 hours (or four full days) before the school starts.
- At least 12 hours (or two full days) during the school year.
- At least 12 hours (or two full days) from outside educational institutions

##### **First Year Teachers:**

- At least 18 hours (or three full days) before the school starts.
- At least 24 hours (or four full days) for school-wide in-service programs.
- At least 18 hours (or three full days) from outside educational institutions

##### **Experienced Teachers (2 or more years):**

- At least 12 hours (or two full days) before the school starts.
- At least 12 hours (or two full days) during the school year.
- At least 12 hours (or two full days) from outside educational institutions.

Teachers and school administrators will participate in various workshops, training, conferences, and seminars (i.e., School Leadership Development, Instructional Leadership Training, and leadership skills) throughout each school year. Following each training, the school officers will be required to disseminate information and share documents with other members of the school officers. Additionally, the regional education service center and its services will be utilized for professional development of the school officers.

#### ***B) Mentoring Program:***

A mentoring program will be implemented by the proposed school campus. The LEAD

Academy Mentoring Program will be an ongoing professional development activity. The overall focus of the program is to provide individualized assistance to teachers (first-year teachers and experienced teachers having serious difficulty in the classroom) and create a positive ongoing professional development atmosphere where everybody can learn from each other.

The LEAD Academy Mentoring Program is a modified version of the Peer Assistance and Review (PAR) program. The PAR program is a research based program and commonly used in many states including Texas. The components of the program offer a useful professional development program model and also serve as an effective evaluation tool to assess teacher performance.

**3. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how educators will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.**

Upon approval of the proposed charter, the EMO and the LEF board will identify and hire administrative team. Initially, the school leadership/administrators will participate in an intensive, minimum two-week training, at one or two high-performing charter schools, focused on job specific responsibilities, educational program, building a culture of climate and success, and school accountabilities. Trainers and subject matter experts will be scheduled to provide job-embedded professional development during and beyond the two-week training.

Following this, our administrators will engage in intense professional development prior to school opening to prepare our incoming new teachers. Instructional staff will attend at least one two-week professional development session on curriculum models, assessments, and instructional methodology implemented in our program. They will also be guided to plan the standards they will teach during each academic quarter within project-based units of instruction. Additionally, the professional development will focus topics but not limited to: onboarding, Induction program, systems training, best practices, skill building, PLC Protocols, peer observation protocols & skills, and student authentic learning experiences. The timeline for professional development for the first year of school's operation is as follows:

- February - May: Job specific training for Principal and Assistant Principal
- February - March: Job specific training for the administrative assistant
- August: All Staff Training (two weeks prior to student start date)
- Sept. - May: Regular training and Professional Learning Community meetings

Each teacher will receive an orientation folder and a personnel handbook. The following topics will be covered prior to the school opening training/orientation. Agenda items for teacher orientation program include but not limited the followings:

- Introductions to school's mission and vision
- Professional growth opportunities

- Specific information on the first workshop opportunity for new teachers
- Organizing for the first day of school
- How to prepare a student centered classroom, setting the tone?
- Ideas for structuring lesson plans
- Management plan and creating a discipline plan before school begins
- Advice for the first week: over prepared, flexible, consistent, respectful
- Lesson pacing
- Staff as a resource
- Lists of first day ideas, a checklist of first day musts
- Conveying teacher expectations
- Preparing a substitute folder
- Parent communication

**4. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration and describe how such time will typically be used.**

As a new school with an innovative program, we will engage in many professional development opportunities, especially during the first year of operation. As a new school with a small leadership team consisting of the EMO, the principal, and an assistant principal, we will form partnerships with experienced and high-quality charter schools, to operate the school effectively and efficiently.

The number of days in school calendar will be 180 days for students. Teachers will be working 190 days including professional development days. The principal will create a calendar for teachers to review professional development activities. The calendar will include professional development days throughout the school year. Depending on subject level, each teacher will receive at least 3 days paid leave to participate in outside professional development opportunities. Additionally, each teacher will be given daily and weekly preparation time.

As mentioned above, all faculty members and administrators will be required to attend designated professional development workshops and seminars hosted by the school and the outside educational institutions. Minimum yearly credit/hour requirements will be as follow:

**Administrators:**

- At least 24 hours (or four full days) before the school starts.
- At least 12 hours (or two full days) during the school year.
- At least 12 hours (or two full days) from outside educational institutions

**First Year Teachers:**

- At least 18 hours (or three full days) before the school starts.
- At least 24 hours (or four full days) for school-wide in-service programs.
- At least 18 hours (or three full days) from outside educational institutions

**Experienced Teachers (2 or more years):**

- At least 12 hours (or two full days) before the school starts.
- At least 12 hours (or two full days) during the school year.
- At least 12 hours (or two full days) from outside educational institutions.

## Performance Management

The authorizer will evaluate the performance of every school annually and for renewal and revocation purposes according to a set of academic, financial, and organizational performance standards that will be incorporated into the charter contract. The academic performance standards will consider status, growth, and comparative performance based on applicable state, federal, and school-specific measures. The financial performance standards will be based on generally accepted accounting principles for sound financial operation. Additionally, the school shall annually engage an independent certified public accountant to do an independent audit of the school's finances. The organizational performance standards will be based primarily on compliance with legal obligations, including fulfillment of the governing board's fiduciary obligations related to sound governance.

Applicants may propose to supplement the authorizer's performance standards with school-specific academic or organizational goals.

1. Describe the school's mission-specific educational goals and targets. State goals clearly in terms of the measures or assessments the school plans to use.

LEAD Academy will continuously review the students' data to improve student outcome. The ultimate goal is to meet and exceed local and state standards. We will first ensure that students are meeting the grade level expectations detailed in the College Career Readiness Standards (CCRS); students will meet these performance goals set forth by the Alabama State Department of Education. Additionally, LEAD Academy will achieve the following mission specific goals;

**Goal 1:** LEAD Academy students will Meet or Exceed Proficiency (Level III + IV) in ELA The ACT Aspire.

**Metrics:**

- Grade K-8: At least 30 percent more of all students will meet or exceed proficiency in the area of ELA than among their counterparts in the Montgomery County.
- Grades K-8: Students with disabilities will meet or exceed proficiency in ELA compared to their counterparts in the Montgomery County.

**Goal 2:** LEAD Academy students will Achieve Mastery in The Area of Math to Meet or Exceed Proficiency (Level III + IV) on ACT Aspire and ACT Quality Core End-of-Course Assessments.

**Metrics:**

- Grades K-8: At least 20 percent more of all students will meet or exceed

proficiency Math than among their counterparts in Montgomery County.

- Grades K-8: Students with disabilities will meet or exceed proficiency in Math compared to their counterparts in the Montgomery County.
- Algebra I EOC: At least 20 percent more of all scholars will meet or exceed proficiency in the area of Algebra I than among their counterparts in Montgomery County.

**Goal 3:** LEAD Academy students will Achieve Mastery of Skills in the Area of Science to Meet or Exceed Proficiency (Level III + IV) on ACT Aspire.

**Metrics:**

- Grades 5 & 7: at least 30 percent more of all scholars will meet or exceed proficiency in Science than among their counterparts in Montgomery County.

**Goal 4:** LEAD Academy students will show growth in their academic performance as measured by NWEA- MAP.

**Metrics:**

- Grades K-8: NWEA-MAP results will show gain from year to year.

**Goal 5:** LEAD Academy students will participate in a project to demonstrate their understanding of scientific process.

**Metrics:**

- Grades 3-8: By the end of 3rd year, 50% of students will complete at least one science project.
- Grades 3-12: By the end of 5th year, 75% of students will complete at least one science project.

**Goal 6:** LEAD Academy students will have higher daily attendance average than Montgomery County Schools.

**Metrics:**

- Grade K-12: Each year, the school will maintain a daily attendance average rate higher than the average at local counterpart schools.

**Goal 7:** LEAD Academy students will participate in extra-curricular and volunteer activities.

**Metrics:**

- Grade 3-12: By the end of third year 50% or students will participate in at least one after school club.
- Grades 9-12: Students will complete at least 100-hour community volunteer hours to graduate.

**Goal 8:** LEAD Academy students will be college and career ready

- 85% of graduating seniors will take at least one or more AP and/or dual credit courses.
- 100% of graduating senior will receive college acceptance

**Goal 9:** LEAD Academy on-time or 6-year graduation rates



- 60% of senior cohort will graduate on-time (within 4-years)
- 88% of senior cohort will graduate with in six years

**Goal 10:** Developing college going culture

- Grades 8-9: LEAD Academy students will meet at least once with their college guidance counselors
- Grades 10-11: Students will meet at least 2 times a semester with their college guidance counselors
- Grade 12: Students will meet weekly with their college guidance counselors
- Grades 9-12: Students will visit at least one local or national college campus with their teachers.

**2. Describe any mission-specific organizational goals and internal and external measures and assessments the school plans to use. State goals clearly in terms of the measures or assessments the school plans to use.**

Our philosophy of continuous improvement requires us to plan, execute (do), monitor (check), and adopt (adjust) so that our beliefs are put in action. Organizational goals for teachers, administrators, staff members, and the governing board will link directly to our students' performance goals. Additionally, LEAD Academy will ensure all of the organization's goals are associated to the goals we set for our students. While achieving our mission specific goals we will improve the graduation rate, improve the percent of students meeting the state graduation assessment performance standard, and improve enrollment in postsecondary options.

**Goal 1:** LEAD Academy administrators and teacher will conduct home visits and build parent involvement and satisfaction.

- Grades K-9: By the end of 3rd year, 75% of parents will be visited at their home.
- In all grades: by the end of 5rd year, 90% parents will be visited
- Parent survey will show at least 85% satisfaction
- Have a minimum of 1 informal parent informational session monthly
- Grades K-9: 85% of parents participate at least one parent-teacher conferences
- 80% of parents will express satisfaction with the school with regard to safety, school rules, academic expectations, and other aspects of the school's culture.

**Goal 2:** Each year, faculty and staff will express satisfaction with school leadership, professional development opportunities, and school culture.

- Each year, 90 percent or more of the faculty and staff will respond favorably on a survey to be developed by or for the school.
- Each year, the school will retain at least 80 percent of its faculty from the previous year.
- Staff attendance at the school's Summer Institute, held during the second week of August each year, will indicate the number of returning faculty.

**Goal 3:** Each year, students will express satisfaction with the school with regard to safety, school rules, academic expectations, and other aspects of the school's culture.

- The school will administer a survey designed to measure satisfaction in the spring of each year.
- After the end of the 3rd year, 85% of current students will return in the following school year.

**Goal 4:** Annual audits of the school will result in an unqualified opinion and no major findings.

**Metrics:**

- Upon completion of the school's second year of operation and every year thereafter, the financial audit will result in an unqualified opinion and no major findings.

**Goal 5:** Each year, the school will operate on a balanced budget (i.e., revenues equal or exceed expenditures) and maintain a stable cash flow.

**Metrics:**

- LEAD Academy's monthly financial statements will reveal sound and balanced budget.

**3. In addition to all applicable mandatory state assessments, identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the school's curriculum, performance goals, and applicable state standards.**

Assessments at LEAD Academy are based on the following beliefs:

- In order to have a complete picture of a student's growth, various types of assessments must be used.
- Assessments for individual students should focus on a student's growth towards a proficiency standard
- There should be a close relationship between a desired student outcome and the means used to assess it.
- Assessing what students do with knowledge is as important as assessing what knowledge they have.
- Assessment should promote and support reflection and self-evaluation on the part of students.

LEAD Academy will implement a variety of assessments and feedback tools at different grade levels. We also believe continuous monitor and adjust instruction throughout the year as part of the continuous improvement model. LEAD Academy will utilize the Northwest Evaluation Association (NWEA) Measures of Academic Progress (MAP) three times a year to determine student growth. As a MAP is a norm-referenced measure of student growth over time. MAP creates a personalized assessment experience by adapting to each student's learning level—precisely

measuring student progress and growth for each individual. MAP is an adaptive, so, it provides essential information about what your child knows and is ready to learn. MAP gives teachers a way to focus and plan for how they use time for either intervening with students or providing enrichment to challenge higher-level students.

Additional curriculum evaluation tools will be used to monitor student progress and identify students in need of support will include: quizzes, tests, and classroom observations. The school will also use benchmarking, locally developed assessment to differentiate instruction. Assessments include baseline, formative, and summative assessments, which will be integrated throughout the digital curriculum. All of the benchmarking, and curriculum based assessments are aligned to the Alabama College and Career Ready Standards.

The School's curriculum based assessments will provide teachers, students, and parents the ability to monitor student progress continuously. Reports will be available from a web based grade book through the learning management system. This system will provide teachers with performance information for on individual student, and class progress. Teachers will use this information along with the evaluation tools to identify students in need of additional instruction and support.

**4. Explain how the school will measure and evaluate academic progress of individual students, student cohorts, and the school as a whole throughout the school year, at the end of each academic year, and for the term of the charter contract. Explain 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. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.**

The school measure and evaluate academic progress by comparing growth in the student's assessments (diagnostic, formative and summative). By collecting, analyzing, and sharing school wide data to drive data discussions, the school will have the ability to determine what is working and what is not working. This would lead to earlier detection of issues by leadership, school support members, and the management company. Once that data is shared, school-wide action plans will be implemented to improve student achievement. The school data report will contain all the assessments, and will be color-coded based on performance. This would be shared out with the Board and community. The Principal will have access to a school-level Dashboard at any point in time, an electronic snapshot of pertinent School-wide data that align with the charter goals and the mission. The information provided in the Dashboard will allow the Principal to easily monitor student, class, grade, and School progress and achievement, and provide leadership that supports the School's mission, vision, and teaching and learning environment. This dashboard will be used by the data team with review and input by all members of the team.

**5. Identify who will be responsible for managing the data, interpreting it for**

**classroom educators, and leading or coordinating professional development to improve student achievement.**

The Principal will have access to a school-level Dashboard at any point in time, an electronic snapshot of pertinent School-wide data that align with the charter goals and the mission. The information provided in the Dashboard will allow the Principal to easily monitor student, class, grade, and School progress and achievement, and provide leadership that supports the School's mission, vision, and teaching and learning environment. This dashboard will be used by the data team with review and input by all members of the team. The management company will work with principal and members of the school team to coordinate professional development that aligns with the school's action plans to increase student achievement.

**6. Explain the training and support that school leadership and educators will receive in analyzing, interpreting, and using performance data to improve student learning.**

The school will engage in the Plan-Do-Study-Act model that is embedded in the Teacher leadership model as a powerful strategy to promote effective, collaborative teaching practices in schools that lead to increased student achievement, improved decision making at the school and district level. We will utilize the "Teacher Leader Model Standards" to guide our work and provide a structured path for professional growth within the school. These Standards will be used across the school, not only to grow educators, but all staff members at the school.

**Model Leader Standards:**

- Fostering a Collaborative Culture to Support Educator/Staff Development and Student Learning
- Accessing and Using Research to Improve Practice and Student Learning
- Promoting Professional Learning for Continuous Improvement
- Facilitating Improvements in Instruction and Student Learning
- Promoting the Use of Assessments and Data for School and District Improvement
- Improving Outreach and Collaboration with Families and Community

**Advocating for Student Learning and the Profession**

The teachers will be trained on this model and the school will have access to cognitive analytics to aid teachers in making data based decisions to improve student achievement.

**7. Describe the corrective actions the school will take if it falls short of student academic achievement expectations or goals at the school wide, classroom, or individual student level. Explain what would trigger such corrective actions and who would be responsible for implementing them.**

The school will begin the school year with a comprehensive school improvement plan that aligns with the goals identified in the charter application. The Principal will have access to a school-level Dashboard at any point in time, an electronic snapshot of pertinent School-wide data that align with the charter goals and the mission. The school will conduct

monthly data reviews to ensure it is on target to meet the goals. If the school fails to meet the goals identified in the charter, it will work with the Board and the management company to develop action plans to improve performance.

# FACILITIES

If the school is seeking to utilize an existing public school facility made available by the charter authorizer, complete Part A and Part B. If the school intends to identify and operate in an independent facility, complete only Part B.

## Part A. Existing Public Facilities (if available)

1. Describe the basic facilities requirements for accommodating the school plan, including number of classrooms, square footage per classroom, common areas, overall square footage, and amenities.

N/A

2. List anticipated specialty classroom needs, including the number of each type and the number of students to be accommodated at one time. Specialty needs may include, but are not limited to, the following:

Type of Anticipated Specialty Classrooms	Number	Number of Students to be Accommodated at One Time
a. Science lab		
b. Art room (with or without kiln)		
c. Computer lab		
d. Library/media center		
e. Performance/dance room		
f. Auditorium		
g. Other (please list)		

3. List anticipated administrative/support space needs, including the anticipated number of the following:

f. Other (please list)	
a. Main office	
b. Satellite office	
c. Work room/copy room	
d. Supplies/storage rooms	
e. Educator work rooms	

4. List which, if any, of the following are essential to fulfillment of the school's athletic program:

Type	Check if Essential
a. Gymnasium	
b. Locker rooms	
c. Weight rooms	
d. Field(s) (football, soccer, multi-purpose)	
e. Baseball/softball field	
f. Other (please list)	

5. Identify any other significant facilities needs not already specified, including:

a. Playground
b. Large common space for assemblies and other large-group meetings
c. Other special considerations (identify and explain)

6. Does the applicant have specific desired location(s) different from those being made available by the authorizer? Yes \_\_\_\_ No \_\_\_\_\_. If Yes and the applicant has a specific facility under consideration, identify by current school name and/or neighborhood (you may add rows to the table as needed).

Desired Location(s):	N/A
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7. Is the applicant willing to share a facility with another school? Yes \_\_\_\_ No \_\_\_\_\_. If so, identify by school name and/or neighborhood (you may add rows to the table as needed)

Desired School Name and/or Neighborhood:	
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8. Please identify funding sources to be used for facility upgrades and/or new construction.

Funding Source(s) for Facility Upgrades and/or New Construction:	
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9. Discuss contingency plans in the event you do not receive a facility from the authorizer.

N/A

## **Part B. Independent Facilities**

**If you intend to operate in an independent facility, describe the process for identifying and securing a facility, including any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, and financing. If you currently hold a facility or have a Memorandum of Understanding or other proof of intent to secure a specific facility, please provide proof of the commitment as an attachment (Attachment 21). Briefly describe the facility including location, size, and amenities. Provide, as an attachment (Attachment 22), supporting documents providing details about the facility, as needed. Public charter school facilities must comply with applicable state, local and authorizer health and safety requirements. In addition, applicants must be prepared to follow applicable city planning review procedures. NOTE: Public charter school facilities shall comply with Act 2015-3, Section 11. (a), regarding access to Alabama Public School and College Authority (PSCA) funds.**

The LED foundation intends to operate in an independent school facility. Members of the LED team intend to be centrally located and easily accessible, to better serve children and families from across the city. The board understands the significant challenges in identifying and acquiring a suitable facility and will remain flexible on the school's location during the search. Our goal is to lease a facility that can accommodate 360 students in the first year and ensure that the facility has adequate space to expand enrollment up to maximum capacity or 576 students. During our third year of operation, we intend to lease an additional nearby facility in which we will house our middle and high school students. The second site will accommodate approximately 672 students.

Both locations will comply with applicable state, local and authorizer health, safety, and applicable city planning requirements, and with Act 2015-3, Section 11. (a), regarding access to Alabama Public School and College Authority (PSCA) funds. The School has retained the services of American Charter Development (ACD) [www.amerccd.com](http://www.amerccd.com) a highly regarded national charter school real estate development and financing organization with a track record of developing and funding Charter Schools. ACD is committed to providing 100% financing and turnkey full-service development for the LEAD school upon approval. ACD provides its services with no upfront cost to the school and will work closely with the LEAD team to ensure the school meets the budgetary and financial obligations required to deliver a fully-functional, customized charter school facility. Once the facility is complete, it is leased back LEAD, with strategic buyout options enabling the school to own its own facility quickly.

Working in collaboration with ACD, the LEAD team also acquired the services of Insite EFS [www.insiteefs.com](http://www.insiteefs.com). A firm specializing in providing site selection services to new and existing charter schools throughout the United States. Further, InSite Educational Facilities Services is the only national full-service brokerage and consulting firm exclusively

dedicated to charter school facilities. Under the guidance of our LEAD Academy Facility Committee, and Unity School Services, ACD and InSite EFS have conducted a detailed search for both existing facilities and raw land options with the proper zoning. Working together and taking into account local zoning regulations, timing, location, demographics, costs, community need and support, and site hazards those options have been vetted and condensed into a list of the most viable options. In creating a list of the most viable options the following criteria was also taken into consideration:

- Total square footage
- Accessibility
- Safety
- Exterior lighting
- Parking
- Location of public transportation
- Signage possibilities

The facility layout will include adequate resource rooms for enrichment programs, common areas for gathering (lunch, assemblies, etc.), and space for school administration.

Every effort will be made to make certain that all settings are conducive to learning. This learning environment takes into account both the interior and exterior of the facility. High standards have been established to ensure students are learning in a safe and healthy environment. Upon receiving a Charter Contract to begin operations of the School, the site will be confirmed and secured and a lease will be finalized. Once these milestones have been met, all necessary improvements and renovations will commence to meet our facility standards and applicable district requirements.

In every classroom and throughout the building evacuation routes for fire safety precautions or other emergencies will be posted. A facility security plan will be established by the School in order to control access to the building and maintain a safe environment for students and staff. The proposed educational facilities will comply with the Alabama Building Code and the Alabama Fire Prevention Code.

The School's programming allows us to be flexible with our facility's location and type (standalone building, office building, etc.). With an estimated enrollment of 360 students in Year 1, the school will need approximately 25,000 square feet and will look to locate in neighborhoods closest to the students targeted. The Board will provide a facility that meets the needs of the student population. Facilities with open space allow for more collaboration and creative placement of student workstations. Given our flexible design, there are many more options for leasing than is available for the traditional school.

The School will provide proof of appropriate facility certification, including all certificates that are required by the applicable building codes prior to the opening of School. All classrooms, office, and restroom space will be ADA compliant and meet the state of Alabama Fire Prevention Code, district fire code, and health and safety requirements.

The property currently under consideration is located at 600 South Court Street in



Montgomery. The property is situated on 4.7 acres and includes a 43,904 square foot facility. This would allow the LEAD team more than ample space in year 1 for operations as well as provide space for student enrollment expansion over time. The current ownership of the property is the Montgomery Area Chamber of Commerce and both LEAD and the Development team have had significant conversations with them regarding the feasibility of this facility. The property is zoned TR4 and the city has confirmed that a school is allowed by right under this zoning. The property also allows ample parking and several locations for ingress and egress making the site ideal for a school use. In addition, to the building improvements on site there is ample green space affording the student body the ability to utilize an outdoor educational environment as well. Please refer to Attachment-22 for more information on the property.

**November, 2017** Our Board finalized our due diligence and Memorandum of Understanding with ACD.

**February 2018** If approval is granted the Facilities and Finance Committees will ensure the enrollment growth projections are up to the future facility scope and will stay within the approved percentage of revenue parameters (+/- 15%). Once validated the Academy Facilities Committee will contact the appropriate officials at the AL DOE and request a preliminary site visit

**Late February 2018** If approval is granted our Board will enter into a binding Letter of Intent with the building owner followed by lease negotiations. ACD will complete their underwriting of the project followed by immediate due diligence of the preferred site, including but not limited to, Phase I environmental investigations, zoning verifications, geotechnical studies (if needed), traffic analysis (if needed), ALTA, topo, and boundary survey's, etc. In close succession the development team will engage the appropriate design and engineering professionals to review the program and finalize the facility design.

**March-April 2018**

- Place site under Contract
- Finalize Due Diligence and Reports
- Release Schematic Design and Pre Concept Level 2 Budget

**Mid-April 2018**

- Submit final package to AL DOE facilities
- Finalize Lease and Facility Budget
- Obtain Facility Code if needed from the AL DOE facilities.
- Release Design for construction or tenant improvement documents

**April-May 2018**

- Legal and Financing
- Finalize Construction Documents
- Receive Permits
- Close on site – If we are to be complete by July 2018,

**May-July 2018** Facility tenant improvements/ construction

**July 2018:** Certificate of Occupancy / Place FFE

**August 2017:** School year begins

**Facility Financing and Lease:** The Academy is seeking to work with ACD because they are a proven Turn Key Developer / Owner of charter schools nationally. The facility will be leased to the Academy and will have defined purchase rights after year three. The objective of the team is for the Academy to secure tax-free bond financing to purchase the facility after year 3. The bond financing will allow for the purchase of the facility and provide funds for the final phase of facility construction. The lease rates will reflect the overall cost of the land, improvements and soft costs.

## **Start-Up & Ongoing Operations**

- 1. Provide, as an attachment (Attachment 23), a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals.**

### **Attachment 23**

- 2. Provide, as an attachment (Attachment 24), the school's plan for all transportation (including field trips, extra-curricular and co-curricular activities, food services, and all other significant operational and auxiliary services).**

### **Attachment 24**

- 3. Provide the school's plan for safety and security for students, staff, facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.**

Every effort will be made to make certain that all settings are conducive to learning. This learning environment includes both the interior and exterior of the facility. High standards are established to ensure students are learning in a safe and healthy environment. Upon receiving a Charter Contract to begin operations of the School, the site will be confirmed and a lease will be secured. At that point, necessary improvements and renovations will commence to meet our facility standards and applicable district requirements.

### **Facility Safety**

In every classroom and throughout the building evacuation routes for fire safety precautions or other emergencies will be posted. A facility security plan will be established by the School in order to control access to the building and maintain a safe environment for students and staff. The proposed educational facilities will comply with the Alabama Building Code.

### **Security Action Plan**

The School will implement a Security Action Plan articulated in its Staff Handbook that prepares all staff for unanticipated events including but not limited to: medical, fire,

hazardous, weather security, etc. The school will cooperate with the agency to provide the safest school possible for the staff and students, and will incorporate all the applicable and appropriate state approved emergency efforts in order to maintain a safe school environment. Accordingly, the School will adopt the emergency plans for fire, hurricane, tornado, and child safety currently in effect within the District.

### **Disaster preparedness**

All staff members will be trained regarding procedures for disaster preparedness plans outlining procedures for emergency situations and natural disasters. Staff will be trained to implement an action plan within an emergency situation. Both students and staff will be trained in planning for these events through routine drills and practice. Procedures and plans will be provided to teachers and the staff through the employee handbook, and parents and community members will receive information regarding emergency procedures via newsletters and parent meetings.

### **Background Checks**

Background checks will be done on all employees, Board members and contractors who will be in contact with the students.

### **Health**

All staff members will be trained in CPR/First Aid. All laws for immunization, students with specific medical conditions and health testing will be followed.

### **Security**

The proposed school may be equipped with a metal detector as the students enter the building. All bags may be searched each morning as the students enter the building. Also, the building will have an alarm system that will be engaged each night when the staff leaves. Keys to the building will be issued to necessary personnel only. The school may have a security guard present each day. These services will be contracted out to a security company.

- 4. Provide, as an attachment (Attachment 25), a list of the types of insurance coverage the school will secure, including a description of the levels of coverage.**

## **Attachment 25**

# **Operations Capacity**

- 1. Describe the applicant team's individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as the following:**
  - Staffing.**

- **Professional development.**
- **Performance management.**
- **General operations.**
- **Facilities management.**

The applicant team consist of the founding board members of LEAD Education Foundation. This applicant team combines deep professional expertise with personal understanding of the challenges and possibilities of creating an outstanding school. Most of the team members are Montgomery residents. More importantly, their work in education, medical, finance, and non-profit service organizations often requires them to confront the realities facing children in Montgomery. The team consists of highly qualified, degreed and experienced educators and community stakeholders who support the school's mission and embrace a shared vision for LEAD Academy. The team will consist of proven and successful thought leaders that have a longstanding reputation as advocates for children and learning.

**Charlotte Meadows** has been an education advocate for the past fifteen years with a single passion—to improve education in Montgomery, Alabama so every student will receive the opportunity to get the best education possible. In addition to understanding governance and operation of the school, Charlotte has deep knowledge and understanding in performance management, staffing and general operational issues.

**Ryan Cantrell** has developed deep understanding in policy and governance while he was working for the Alabama Republican Party helping to accomplish the first Republican takeover of the State Legislature since Reconstruction. Ryan has been active in the education reform movement since 2013 when he started working for the American Federation for Children, a school choice advocacy organization that works to ensure that low- and middle-income families have the ability to choose the educational environment that works best for their children.

**William A. Green, Jr.** worked as a stockbroker and has experience in finance. As a consultant for Fortune 500 businesses and government entities, William analyzes financial statements and reconciles budgets on a daily business as part of his duties.

**Dr. Lori White** is a physician and faculty member supervises resident physicians during their training, as well as, medical students attending the UAB School of Medicine Montgomery Campus. She serves as the Curriculum Committee Chair, the Acting Internship Clerkship Director and the Inpatient Services Director as part of her position with UAB Montgomery. Lori has expertise in staffing, Professional development, Performance management.

The LEF Board identified Unity School Services and its consultant, **Dr. Soner Tarim**, to help establish the proposed school. In October 2017, the Texas Charter School Association (TCSA) selected Dr. Tarim as the recipient of the 2017 charter school Leader of the Year at the Texas Charter school conference. TCSA recognizes charter leaders that advocate for charters at the state and national level, have successfully replicated high performing charters that are innovative in their approaches to educating all students, and serve as a

mentor to other charter leaders.

Dr. Soner Tarim is the Founder of Harmony Public Schools and he has been an educational advocate for more than 30 years, encouraging students in underserved communities to pursue learning in science, technology, engineering, and mathematics (STEM) fields.

Under Dr. Soner Tarim's leadership, Harmony has earned the reputation as one of the best charter schools in the country with many of its campuses recognized on prestigious high school rankings, such as U.S. News & World Report and Children-at-Risk. These successes have only increased Harmony's demand with 55 campuses scheduled to open in the 2017-18 school year in Texas and Washington D.C., educating close to 34,000 students.

During past 17 years, Dr. Tarim successfully completed 9 different bond financings totaling over \$400 million to build 54 charter school campuses. Dr. Tarim was also awarded state, federal, and philanthropic grants for campus replication.

**2. Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.**

Dr. Tarim has experience in facility acquisition, build-outs and renovations and will be leading this project along with members of the board and Robert Giordano from American Charter Development (ACD). ACD is a national charter school real estate development and financing organization with a track record of developing and funding charter Schools nationally. ACD can provide 100% financing and turnkey full-service development for your charter school when requested. ACD provides its services with no upfront cost to the school and meets the budgetary and financial obligations required to deliver a fully-functional, customized charter facility to you. Once the facility is complete, it is leased back to the school, with strategic buyout options which enable the school to own its own facility quickly.

## SECTION 3. Financial Plan & Capacity

### Financial Plan

- 1. Describe the systems, policies, and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.**

The proposed school will establish and maintain its financial accounting system on an accrual basis using Generally Accepted Accounting Principles. The LEF Board will establish financial policies and procedures that guarantee the integrity of the school's financial operation while providing the data to allow school administrators to make fact-based decisions. Solid financial controls rely on the following elements: 1) strict segregation of duties, 2) transparent processes (including board oversight), and 3) a professional audit. The school will use these elements as it creates controls for receipts, disbursements, petty cash, payroll, contracts, and investments. In addition, the school plans on using an outside vendor to staff its accounting function. One criterion for vendor selection will be the ability to professionally implement and support the school's financial controls.

If we cannot retain outside vendor to handle our accounting and finance, we will implement the following system, policies, and processes. Internal controls will be based on sound practice, such as segregation of duties or compensating controls, use of pre-numbered forms, limited access to cash, and monthly reporting to the Board. The business process also emphasizes the seamless and convenient delivery of service so that school staff can easily comply with internal controls and are able to concentrate on the educational process.

The internal control policy of the School shall be guided by the following broad principles:

- Responsibility will be clearly established.
- Adequate records will be maintained.
- Assets will be insured & inventoried and appropriate employees bonded.
- Adequate procedures for cash receipts, cash disbursements, and record keeping will be in place.
- The School will undergo regular and independent audits.

Specific internal controls include, but are not limited to:

- Only one bank account will be authorized for operations
- The bank statement will be opened intact by the reconciler

- The bank statement will be reconciled by an employee who has access to neither the general ledger nor check-writing system
- Items outstanding for 180 days will be investigated
- All receipts will be deposited intact
- All checks received will be immediately stamped "For Deposit Only"
- Deposits will be made at least twice weekly if funds have been received
- Receipts will be evidenced by a multipart signed, pre-numbered receipt
- All other disbursements will be made by check
- Checks require two signatures
- Checks will not be pre-signed under any circumstances
- Checks for expenses other than payroll will be issued only upon verification by the Principal of receipt of the good or services ordered in good condition and correct quantity
- Appropriate documentation will be maintained for disbursements (invoice, contract)
- Employees will be paid only upon verification of employment
- Appropriate legal forms (W-4, I-9) must be completed prior to employees being paid
- Property will be tagged
- Property will be inventoried at least annually
- Discrepancies in the property inventory will be investigated and reconciled
- Financial statements (see below) will be reviewed by Charter School Board, evidenced by action
- The budget will be approved by the Board prior to the beginning of each fiscal year, evidenced by action
- Budget amendments will be approved as necessary
- Financial reports will be submitted as required by Charter and Rule
- An annual audit will be conducted by an independent auditor (see below)

The Principal will prepare detailed financial statements for analysis. These financial statements will be reviewed by the Board at meetings for monitoring/review, and will be submitted to Alabama Charter School Commission as required.

The monthly financial statements will be in compliance with state and federal guidelines.

- Balance Sheet
- Revenue and Expense Report
- Year-to-date comparison of budgeted vs. actual revenues and expenditures
- Notes to Accompany Financials, to include:
- Actual enrollment at the time the statement is submitted
- Projected enrollment for the current school year

Upon approval, the board will select an electronic general ledger program to be used for the back office accounting. The program will have integrated general ledger, accounts payable, payroll, and bank reconciliation functions. The comprehensive nature of this software coupled with the internal controls in place facilitates the recording of transactions by fund, function, and object. This allows for transactions to be recorded accurately and appropriately, including properly identifying purchases of property. Property records are maintained in accordance with state requirements. Source documents supporting

transactions are preserved, facilitating the audit process. General ledgers and books of original entry are kept so as to allow financial statements in accordance with generally accepted accounting principles and in compliance with state and federal guidelines.

Internal accounting procedures for the School pertaining to receivables and disbursements are as follows: For receivables, all cash payments will be logged, coded by source and deposited daily (if received). Daily deposits will be reconciled to cash receipts logs. Disbursements will be made only to approved vendors and must be appropriately authorized. Disbursement voucher packages are prepared at the School site and authorized by the School Principal. Disbursement vouchers are submitted to the accountant with appropriate supporting documentation to substantiate the nature, account classification, business purpose and amount.

Disbursement vouchers are reviewed and approved by the Principal and the accountant. All checks over a pre-approved threshold, as established by the Board, will require dual signatures. Certain checks & checks over a certain amount will require board chair signature and/or approval. Authorized signatures on checks are limited to the Chair of the Governing Board, the School Principal or designee, and a representative of EMO, as approved by the Board.

Bank statements - will be reconciled on a monthly basis. The School will provide regular financial statements to Alabama Charter School Commission. Including a statement of revenues and expenditures and changes in fund balances, prepared in accordance with generally accepted accounting principles. These will be provided on the dates required by in the charter school contractual agreement between the School and Alabama Charter School Commission.

Wire Transfers - copies of all wire transfers (e.g., FTE funds, grants, charter school capital outlay) into the school's banking account(s) along with supporting documentation are maintained and recorded in the general ledger by journal entry.

Internal Revenue Collection - any funds collected at the school (i.e., lunch monies, fundraisers, field trips) may be initially collected by the school staff. These funds along with supporting documents are submitted to the Financial Manager whose responsibility is to record and prepare the deposit. All deposits will be prepared in duplicate; the original goes to the financial institution and the copy remains intact in the deposit book. A copy of the financial institution validated receipt along with supporting documentation will be maintained.

Capital Expenditures - purchase orders are required for all capital expenditures and are pre-approved by the Principal or Designee. Limits are set by the Board of Directors and may change as necessary. These purchase orders are prepared in duplicate with one going to the vendor and the other remaining at the school on file in the Accounting Office. Any purchase order totaling more than the limit, as set by the Board of Directors requires Board action.



Operational Checking Accounts - all expenses related to the operations of the school are paid from the operating account. All operating expenditures are subject to the same approval processes as indicated for capital expenditures. All accounts are reconciled on a monthly basis and presented to the Board of Directors for review.

Authorized Check Signers - authorized signers on school accounts are limited to certain specified individuals as approved by the Board of Directors.

Data Security - financial data will be maintained on a secured system/network. Only the principal and authorized representatives of the Board of Directors have access to the data. Appropriate file backups and physical records will be maintained in a secure environment.

Additionally, Bank Reconciliation and Bank Registers will be submitted to the Board along with the financial statements. Providing further transparency, the Principal and the Board will have access to the bank register and images of paid invoices and checks at any time through a secure online document storage facility. The auditing firm shall be selected by request for proposal (RFP) process and only those firms experienced in audits of charter schools will be considered. The audit will be of assistance to the Board in carrying out its responsibility to assure that its financial resources are properly managed.

Accounting records will be maintained at the School. Appropriate "permanent file" records will be housed in a fireproof filing cabinet and will comply with the provisions of the Family Educational Rights and Privacy Act (FERPA) and IDEA in the establishment, maintenance, correction, and disposal of student records. The right to inspect and review educational records and the release of information, or instructional materials will be consistent with federal and state law.

## **2. Describe the roles and responsibilities of the school's administration and governing board for the school finances and distinguish between each party.**

The Board is accountable for the financial performance of the School. The Board approves budgets, sets policy, establishes and approves procedures, ensures that financial reports are made and controls are in place, and makes certain that the financial management of the School meets regulatory requirements, maintains sound fiscal standards, and remains financially viable.

The Board delegates to the education management company, Unity School Services, the responsibility for purchasing, accounts payable, accounts receivable, payroll, human resources, benefits administration, information technology, and insurance. However, the Board is responsible for the oversight of the education management company.

The Board will retain a certified public accountant to compile monthly reports of the results of the School operations. The expenditures compared to budget will be reviewed and approved by the Board at each meeting as evidenced by Board minutes. In addition, the Board will retain an independent auditor to provide audited financial statements at the School's fiscal year end.

**3. Describe the school's plans and procedures for conducting an annual audit of the financial and administrative operations of the school.**

An annual audit report will be performed by the independent auditor in accordance with Governmental Auditing Standards at the end of each fiscal year and furnished to the Board. The auditing firm shall be selected by request for proposal (RFP) process and only those firms experienced in audits of charter schools will be considered. The audit will be of assistance to the Board in carrying out its responsibility to assure that its financial resources are properly managed.

**4. Describe how the school will ensure financial transparency to the authorizer and the public, including its plans for public adoption of its budget and public dissemination of its annual audit, annual financial report, monthly check register, and monthly financial reports.**

Annually, the school will adopt its budget at a public board meeting. It will post electronic copies of its annual budget, budget amendments, annual audit, and Board meeting minutes online for public transparency. The School will prepare an annual financial report for the Alabama Public Charter School Commission.

**5. Describe any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services.**

Upon approval of the application, the Board of Directors of LEF will contract with Unity School Services, to provide comprehensive management services to include: Facility, Equipment Procurement and Maintenance, Management Consulting and Financial Services, Insurance, Educational Programing, Marketing and enrollment, Personnel and operations support. The contract amount will be 15% of the school's annual operational budget. The school will also contract with the Unity School Services for curriculum, professional development, and technology Support Services.

The proposed school plans on using outside vendors for food, janitorial, and financial accounting services when possible. The EMO will oversee selection of these services. Selection of these vendors will be done through a competitive bidding procedure. All vendors will be approved in accordance with federal and state procurement laws, and in accordance with our Board policies.

**Janitorial Services:** Depending on the size and type of facility, we will request from our vendor to have an on-site person to handle these services. We will select a vendor based on its history and reputation. We want to make sure that they have good working relationships and proven track records with similar traditional districts and public charter schools. The vendor shall have all the necessary insurance and bond capacity to perform its duties. The vendor shall also demonstrate an understanding of state and federal laws pertaining to the disposal of hazardous materials including cleaning chemicals.

**Food Services:** The proposed school will participate in the National School Breakfast and Lunch Program. Vendors will participate in a competitive bidding procurement adopted by the LEF Board. Vendors must possess all required certifications regarding meal services. Vendors must be in compliance with state and USDA required rules and regulations regarding food distribution and reporting.

**Accounting Services:** The provider must have extensive knowledge and expertise in 1) Account Payable Services (check writing, posting account records, preparation of year-end reports including 1099), 2) Payroll (check writing, preparation of payroll tax deposits, electronic deposits, preparation of required state and federal payroll tax reports, preparation of W-2 forms), 3) General Accounting (maintenance of all financial records, bank reconciliation, preparation of monthly financial statements), 4) Budgeting and Forecasting (preparation of annual budget, projection of future state revenue, assistance in the preparation of cash flow projection), 5) Budget and data submission, maintenance of the financial records, 6) Federal Funds and Grants (maintenance of accurate records on all Federal funds and grants, monitor level of spending, electronically file request for funds).

**6. Describe the school's plans for obtaining liability insurance to indemnify the school, its board, staff, and educators against tort claims.**

Charter School shall obtain and maintain insurance on the Officers and Trustees, general liability, worker's compensation, real and personal property, fidelity bonds, and automobile liability in the following amounts:

- Officers and Directors/ Errors and omissions: \$1,000,000 per claim;
- General liability: one million dollars (\$1,000,000) per occurrence;
- Fidelity bonds: no less than two hundred fifty thousand dollars (\$250,000);
- Automobile liability: one million dollars (\$1,000,000) per occurrence.

**7. Budget Narrative: As an attachment (Attachment 26), present a detailed description of assumptions and revenue and expense estimates, including, but not limited to, the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising).**

- a. **Per-Student State Revenue. Use the figures below in developing your budget assumptions.**
- b. **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 are secured and which are anticipated, and include evidence of commitment for any funds on which the school's operation depends.**
- c. **Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.**
- d. **Year 1 cash flow contingency in the event that revenue projections are not met in advance of opening.**
- e. **Start-up and five-year budgets with clearly stated assumptions.**

Although the proposed school has no financial history and capital, Board members of the LEF have a great deal of expertise and background in finance and banking. The proposed school finance will depend on its Board members' reputation and their personal credit backing for its start-up and regular operations. The LEF Board already received a commitment letter from American Charter Development (ACD) to help offset the start-up cost and their facility needs. Board members will continue to be committed to providing their personal credit whenever necessary to carry out the mission and vision of the charter schools. Members of this unique board are volunteers and no member is paid for the services he or she provides; hence, the board members are very excited about the opportunity that will be given to prepare students for their future.

Additionally, upon approval of this proposal, the board members will organize an aggressive fundraising campaign. The fundraising plan will include the following strategies:

- Soliciting funds from corporations and local businesses,
- Soliciting funds from private foundations,
- Conducting business roundtable meetings with lenders and potential donors,
- Soliciting donations from national organizations.

We anticipate to receive donations of \$100,000 in the form of cash and goods such as computers and/or school furniture. This amount was not included in the budget because there is no firm commitment yet. Additionally, several grant applications will be made to local and national philanthropic organizations.

The proposed budget is geared towards achieving high academic standards while ensuring financial sustainability. The main source of funding for the proposed school will come from state revenue and federal funds. First year's revenue (\$2,697,169) is estimated based on an average daily membership of 360 students receiving an average of \$7,211. This revenue estimate includes federal, state, local funds. Other funding includes National Lunch Program reimbursements that are calculated based on 75% student participation.

We do not believe that we will have enrolment problems based on our interaction with parents and local stakeholders. In the event that we do not have enough students for the first year or funds for per pupil allocations are not available as early as expected, or are lower than expected, LEF will take the following action(s):

- Many of our board members have long term working relationships with regional banks. We will seek short-term lines of credit from these banks until issues are eliminated.
- There is always an option to eliminate or minimize all related expenses including reduction in personnel (teaching and administrative positions). Also, student/teacher ratios for certain grades can be adjusted, temporarily.
- We may consolidate administrative and other positions temporarily
- We will negotiate for delay of payments including deferring rent payments to the second year of operation by amending the lease agreement.

## **Financial Management Capacity**

**1. Describe the applicant team’s individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as the following:**

- **Financial management.**
- **Fundraising and development.**
- **Accounting and internal controls.**

The LEF Board members have a great deal of experience in finance and accounting. Specifically, Mr. William A. Green has background in banking and finance. In spite of this vast knowledge, our board members will receive school accounting and finance training, annually to keep up with new financial requirements. This is necessary because the board needs to have a basic understanding of the key quantitative and qualitative financial information required to govern the proposed school. The principal will provide monthly financial reports to the board during every board meeting. These financial reports will include financial performance indicators that are relevant and measured monthly. Some of the indicators will be visited quarterly, and bi-annually as they become available.

The LEF Board members understand the importance of fundraising and they have been actively engaged in the community to solicit this effort. Upon approval of this proposal, the board members will organize an aggressive fundraising campaign. The fundraising plan will include the following strategies:

- Soliciting funds from the corporations and local businesses,
- Soliciting funds from private foundations,
- Conducting business roundtable meetings with lenders and potential donors,
- Solicit donations from philanthropic organizations.

A local bank already committed to provide loan for the proposed school (Attachment-28). Upon approval of this charter, the LEF Board members will submit a line of credit applications to local banks, if needed for un expected expenditure. To raise the start-up funding several grant applications will be made to local and national organizations including Walton Family Foundation.

This Board’s experience in the organizational, financial, and other tasks required to open and operate the charter school is evident by their prior experience on prior school Boards, advocacy, and policy development. To provide accounting internal controls the Board will retain a certified public accountant to compile monthly reports of the results of the school operations. In addition, the Board will retain an independent auditor to provide audited

financial statements at the School's fiscal year end.

Additionally, the Unity School Services leadership team has decades of experience in Education, Finance, Business Management, community relations, and related fields and has a proven track record of success. Dr. Tarim successfully completed 9 different bond financings totaling over \$400 million to build 54 charter school campuses. Dr. Tarim was also awarded state, federal, and philanthropic grants for campus replication.