

Alabama Charter School Renewal Application

Charter Renewal Application #000830

Lead Academy

Location Code: 802

Submitted To:

Alabama Public Charter School Commission
Alabama Charter School Commission

50 North Ripley St.
P.O. Box 302101
Montgomery, AL 36104
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Submitted By:

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GENERAL

A. School Information

School Type: **Elementary / Middle / High**
 Grade Levels: **[PK, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12]**
 School District: **Montgomery**
 Neighborhood / Community: **Montgomery**
 Organization Type: **Non-profit Corporation**
 Sponsoring Entity: **Non-profit Organization**
 Address: **2897 Eastern Blvd , Montgomery, AL 36116-1021**
 Phone: **1 334-451-3127**
 Fax:
 Web Site: **www.leadacademyal.org**
 Calendar Type: **Standard - 180 instructional days**
 Educational Service Provider: **LEAD Family Teacher Organization (FTO) (None)**

B. Primary Contact Person

Name: **Erik Estill**
 Mailing Address: **2897 Eastern Blvd Montgomery, Alabama 36116**
 Mobile Phone: **334-451-3220**
 Alternate Phone:
 Email: **eestill@leadacademyal.org**
 Current Employer: **LEAD Academy**

C. Attendance Projections

Grade Level	Year 1 Enrollment		Year 2 Enrollment		Year 3 Enrollment		Year 4 Enrollment		Year 5 Enrollment	
	Min.	Max.	Min.	Max.	Min.	Max.	Min.	Max.	Min.	Max.
PK	18	18	18	36	36	36	36	36	36	36
K	96	96	96	96	96	96	96	96	96	96
1	96	96	96	96	96	96	96	96	96	96
2	96	96	96	96	96	96	96	96	96	96
3	96	96	96	96	96	96	96	96	96	96
4	96	96	96	96	96	96	96	96	96	96
5	96	96	96	96	96	96	96	96	96	96
6	72	72	96	96	96	96	96	96	96	96
7	48	48	72	72	96	96	96	96	96	96
8	72	72	48	48	72	72	96	96	96	96
9	72	72	72	96	48	48	72	72	96	96

10	48	48	96	96	96	96	48	48	72	72
11			48	48	96	96	96	96	48	48
12					48	48	96	96	96	96
Total	906	906	1026	1068	1164	1164	1212	1212	1212	1212

D. Board Members

Name	Title	Contact Information	Current Employer
Dickey, Jeffrey	Board Treasurer	P: M: 334-799-6263 E: jeff@thewatersal.com	New Waters Realty
Estill, Erik	Executive Director	P: 3344513220 M: 3344516328 E: eestill@leadacademyal.org	LEAD Academy
Estill, Erik	Executive Director	P: M: 334-451-3220 E: eestill@leadacademyal.org	LEAD Academy
Farrow, Ben	Board Secretary	P: M: 334-451-0683 E: bfarrow@awf.law	Anderson, Williams, and Farrow, LLC
Hill, Elizabeth	Board Member	P: M: 334-546-1803 E: lizhill708@gmail.com	Retired School Administrator
Hughes, Ph.D., Tom	Board Member	P: M: 334-414-8127 E: thomas.hughes@au.af.edu	School of Advanced Air and Space Studies
McCall, Sonya	Board Member	P: M: 321-480-3297 E: sjackson4115@yahoo.com	Retired Military
Meadows, Charlotte	Board Chairperson	P: M: 334-324-8431 E: cbmeadows62@gmail.com	Former Alabama House of Representative Member
Robertson, Ph.D., Kecia	Board Member	P: M: 334-561-1296 E: ktrob2012@gmail.com	Noridian Health Care

Executive Summary

1. Enrollment and Demographic Information

Executive Summary

Overview of the mission and vision

The mission of LEAD Academy is to provide innovative programs designed to spark curiosity, maximize learning potential, and 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 was established by the LEAD Education Foundation (LEF), a Montgomery based non-profit organization. The founders of the LEF are passionate about transforming the K--12 educational system in Montgomery, Alabama, by combining their experience in education and business with the best research-based techniques of imparting knowledge to offer an innovative charter school program. These best practices have included but are not 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 impact student learning positively. LEAD Academy focuses instruction on Webb's Depth of Knowledge, which includes four content areas of knowledge acquisition which focuses on recalling and reproducing data, definitions, details, facts, information, and procedures; knowledge application, including the use of academic concepts and cognitive skills to answer questions, address problems, accomplish tasks, and analyze texts and topics. Knowledge analysis involves thinking strategically and reasonably about how and why concepts, ideas, operations, and procedures can be used to attain and explain answers, conclusions, decisions, outcomes, reasons, and results. Lastly, knowledge augmentation allows students to think extensively about what else can be done, how else learning can be used, and how to use what they have learned in different academic and real-world contexts.

The name LEAD stands for Lead, Engage, Achieve, and Develop. The founders of the LEF aimed 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 STEAM 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 concern has resulted in a renewed interest in STEAM education. It is evident that students in the United States are underperforming in Math and Science. STEAM Education is an approach to learning that uses Science, Technology, Engineering, the Arts, and Mathematics as access points for guiding student inquiry, dialogue, and critical thinking.

In order to equip our students with 21st-century skills, we will continue to emphasize improving the art of reading, which includes writing, in addition to STEAM. The founding Board continues to create a school environment that promotes the holistic development of the students while offering core academic courses as well as social, emotional, and career guidance that inspires students to become productive citizens and lifelong learners.

To implement these ideas, we propose using a new model called STEAM (Science, Technology, Engineering, Art, Mathematics) and Social and Emotional Learning.

The founders of LEF continue to establish a school ecosystem where parents have an assurance that the school is genuinely concerned about the welfare and dignity of their children. Instruction is student--centered and project--based. Each individual is recognized as unique, with various interests and talents. Therefore, individual attention and motivation is provided to students with the help of blended learning strategies, intensive counseling in social and emotional learning, and personalized goals. These components are considered the keys to motivating our students. Specific elements are required to accomplish our mission and vision.

These elements are the building blocks of our program:

1) Student Oriented Teaching

Individual attention is given to every student

Diagnostic tests administered periodically

Use of data (all forms) to measure student progress

Early multi-tiered instruction

Individual or group research projects assigned to students

2) Comprehensive Core Course Curriculum

Rigorous and relevant core courses (i.e., AP, Dual Credits)

More electives offered (i.e., Coding, Animation, Electronics, Robotics, Debate)

3) Emphasis on College & Career

Cultivation of college and career culture

Workforce Development

Partnership with universities

Dual Credit Program

Visits to college campuses

4) Qualified and Dedicated Teachers

Hiring certified teachers and content area teachers

Diverse faculty and staff

Frequent home visits

Use of data to measure teacher retention and satisfaction

5) Social and Emotional Learning

Encourage selfawareness and responsibility in all the students

Promote honesty, cooperation, and social awareness

Challenge students to develop personal and social skills

Empower students' emotional skills to help them make responsible decisions

Support parental and community involvement

LEAD Academy of Montgomery County is governed by five core values that define our school. These values guide our decisionmaking 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 enroll have family problems, health challenges, lack the financial support to achieve their goals, and want a safe and civil environment within our urban setting. For this reason, the Board believes that LEAD Academy must provide a comprehensive system of support designed to meet all students' needs and is a necessary alternative to the traditional schools in Montgomery County. LEAD Academy's Board understands that it is difficult for students to reach their true potential unless all individual student needs are met, including social and emotional. Providing no-cost breakfast and lunch for all students through the Community Eligibility Program (CEP) ensures that all students are fed two healthy meals daily, igniting their brain power to do their best.

Montgomery County families have shown a strong desire to be a part of LEAD Academy each year, even as the pandemic derailed public education nationwide. At the end of the 2023-2024 school year, we had all seats filled with 500 students on the waiting list. However, our waiting list still exceeds the number of available seats. Once school began, many LEAD students who had applied for Magnet School in Montgomery Public Schools were granted seats at those schools. Our EL enrollment is growing slowly, and we service them through direct instruction and academic support.

Attachments

Section 1: Enrollment and Demographic Information

1.1	Board Approval for Application	Estill, Erik, 9/29/23 5:49 PM	PDF / 249.749 KB
1.2	Table A	Estill, Erik, 9/25/23 5:16 PM	PDF / 25.925 KB

Looking Back: The Record of Performance

1. Academic Performance

Academic Performance

The past few years have presented unprecedented challenges to the education sector. Like all schools, LEAD Academy has been no exception to the far-reaching effects of the global pandemic. LEAD Academy opened its doors in 2019, right before the start of the pandemic. The emergence of the COVID-19 pandemic disrupted the traditional educational landscape, compelling us to adapt swiftly to ensure the continuity of learning for our students. During this time, we observed a distinct pattern in our data that underscores the impact of the pandemic on academic achievement.

As the pandemic unfolded, we implemented a hybrid instruction model to navigate the uncertainties. While this model allowed us to continue delivering education to our students, it came with unique challenges. The transition from traditional, in-person instruction to a combination of in-person and remote learning was challenging. Students and educators had to adjust to this new learning paradigm, and this adjustment period naturally impacted academic progress. Before reinstating the state assessment, we relied on benchmark assessments to gauge student progress. Our data during this period revealed that students who were able to attend school traditionally and participate in these benchmark assessments exhibited notable growth. This trend underscored the importance of in-person instruction and the challenges presented by the hybrid model.

It is crucial to acknowledge that the impact of the pandemic on academic achievement was not unique to LEAD Academy but was a challenge faced by schools nationwide and globally. The educational community at large grappled with finding practical solutions to continue providing quality education while navigating the uncertainties and disruptions caused by the pandemic. Despite these challenges, our dedicated educators, staff, and students worked tirelessly to adapt to the circumstances. We implemented innovative strategies, provided additional support, and maintained our commitment to the academic growth of our students.

LEAD Academy is a distinguished public charter school serving students in Montgomery and the surrounding areas. Committed to fostering the holistic development of the "whole" child, we have continuously improved our academic program to provide a comprehensive education that meets the unique needs of our students. Our cornerstone emphasis on the STEAM program (Science, Technology, Engineering, Arts, and Math) reflects our dedication to preparing students for success in an ever-evolving world. We take pride in our dedicated faculty, innovative curriculum, and strong community partnerships that collectively contribute to the holistic development of our students. Our unwavering commitment to fostering a safe, inclusive, and academically enriching environment has yielded remarkable outcomes as we continue to acknowledge our room for academic growth.

According to the goals in the 2021-2022 Performance Framework, LEAD Academy received an overall state rating of 53% F. LEAD's students in grades 3-8 scored Does Not Meet the expectations in the areas of Math Proficiency and Math Growth. However, the overall proficiency rating in ELA, ELA subgroups, Math subgroups, Science, and Science subgroups compared to Montgomery County, the local school district, Meets Expectations. Referring back to the original charter application developed in 2017, LEAD set goals to Meet or Exceed ELA and Math proficiency by 30% more than their counterparts in Montgomery County. Although the goals were

not met, LEAD's middle school was "approaching" in the area of ELA by 25% compared to the traditional, non-magnet middle schools in Montgomery County using the unofficial ACAP 2022-2023 data. Furthermore, the unofficial ACAP 2022-2023 data shows LEAD Academy has significant growth in ELA and Science. According to the most recent unofficial ACAP Summative Assessment (2022-2023), LEAD Academy's proficiency in English Language Arts was 31.03%, Math was 2.38%, and Science was 22.02%. English Language Arts reflected approximately 25% growth compared to data from the 2021-2022 school year, and Science proficiency reflected 57% growth.

All of the students participate in the required state assessments. Our school families are included in the data process because student reports are shared with the parents, and parent meetings are hosted to explain the data and next steps. We are committed to transparent accountability measures and continuous improvement to address areas of need. We have achieved a remarkable 100% participation rate in state testing for English Language Arts (ELA) and Math and a commendable 97.73% participation rate in Science, as indicated by State Report Card data. This high participation rate reflects our commitment to academic accountability and assessment.

Aside from state assessments, district assessments, and progress monitoring data help us determine our progress toward our educational goals throughout the school year. NWEA MAP (Northwest Evaluation Association, Measures of Academic Progress) is an adaptive assessment tool widely used in education to measure students' academic growth and proficiency in various subjects. It is designed to provide educators with valuable insights into individual student's learning levels and progress over time. We also use Renaissance Star Reading and Math Assessment. We employ a robust assessment system that includes regular formative and summative assessments to track student progress and ensure academic growth. Students take the NWEA Map and Renaissance Star Reading and Math assessments every school year during the district's Fall, Winter, and Spring windows.

On our Academic Performance Framework, additional goals were set. The first goal was academic. Using district data, NWEA Map, as the performance measure, goal one was to increase reading proficiency on the End-of-the-Year NWEA Map from 28% in 2020-2021 to 60% in 2023-2024. In the area of Reading, 82% of the goal was met, and in math, which was approaching 60% of the goal was met. The second goal is to assess and increase the culture and climate measured by parent, teacher, and student surveys. The data from the surveys show improvement from year to year and show the effectiveness of the organization and practices of the school.

As a school district, we believe that when students enroll at LEAD Academy, they embark on a transformative journey toward academic success. This journey is characterized by steady and impressive growth, a testament to our students' and educators' dedication and hard work. The heart of our narrative lies in comparing students enrolled for just one year and those who have dedicated three years to their education at LEAD Academy. Both groups exhibit commendable academic progress, in line with the expectations of a high-quality educational institution. However, the data reveals a compelling trend: Students who choose to stay with LEAD for three years show even more substantial gains than if they were to attend their zoned school in Montgomery County. This observation is pivotal. It underscores a fundamental principle: the longer students remain enrolled at LEAD Academy, the greater their likelihood of bridging the skill gap and catching up to their grade-level skills. This phenomenon is a testament to our school's unwavering commitment to fostering an environment where every student can thrive.

During the 2021-2022 school year, LEAD Academy underwent a transformative shift in its administrative team. This new team displayed remarkable dedication in aligning various aspects of the school with federal and state regulations, including critical areas such as counseling, special education, gifted programs, and federal initiatives. However, it is essential to acknowledge that

this transition came with its set of challenges, including significant turnover among both administrative personnel and teachers/staff, which inevitably had a substantial impact on academic performance. In the initial stages, individuals were often required to take on multiple roles, sometimes leading to specific oversight issues. Due to the impact on student achievement, another goal or initiative by the school was to increase the number of experienced teachers. Data shows we increased our experienced teachers in 2021-2022 from 32.17% (2020-2022) to 64.83%. We increased our in-field teachers from 38.78% (2020-2021) to 45.86% in 2021-2022.

As we enter our third year with the new administration firmly in place, we are proud to report that substantial gains have been realized. The diligent efforts of our dedicated administrative team, combined with the stability they have brought to our school, have resulted in marked improvements in academic achievement and a notable enhancement in our compliance with essential regulations. These efforts underscore our commitment to providing our students with the best possible educational experience and maintaining a high standard of compliance in all areas of our operations.

At LEAD Academy, challenges are opportunities for growth and transformation. We acknowledge that we have been designated as a Comprehensive Support and Improvement (CSI) school due to falling within the bottom 5% of Title I schools. While this designation represents a hurdle, we are determined to turn this challenge into a positive, forward-looking endeavor. Our journey as a CSI school has not deterred our commitment to excellence. Instead, we see it as an opportunity to assess our strengths and areas for improvement, make strategic and innovative changes, and provide even better support to our students and stakeholders. One of the positive outcomes of our CSI designation is that we have been granted additional funding to enhance our academic programs and support services. This funding enables us to invest in initiatives that benefit our students and the school community. With the added financial resources, LEAD Academy has taken proactive steps to address our academic challenges and improve student outcomes. Some of the key measures we have begun to implement and would like to pursue further are:

Hiring Additional Personnel - We have expanded our team by hiring highly qualified educators, instructional coaches, and support staff to provide focused attention to our students' academic needs. These professionals bring diverse expertise and innovative teaching strategies to the classroom, allowing us to provide small-group learning environments and targeted instruction.

Specialized Intervention Programs - We have introduced targeted intervention programs in English Language Arts (ELA) and Math to address the areas of greatest need. These programs offer personalized support and resources to help students improve their proficiency. MyPath Learning, a computer-based resource, will be implemented daily inside and outside school hours to provide students with an individualized learning program to address skill deficits and close educational learning gaps.

Professional Development - Our teachers and staff benefit from ongoing professional development opportunities to stay updated with the latest teaching methodologies and to continuously improve their skills. Although we have increased our number of certified teachers at LEAD Academy, we have many teachers who are considered out-of-field. Professional development is a priority as we attempt to improve teacher pedagogical practices and content knowledge. Professional development includes dyslexia training, educational program-specific training, special education training, and intervention training.

Community Engagement - LEAD Academy recognizes that our journey toward improvement involves parents, students, teachers, the community, and all stakeholders. We actively engage our stakeholders in shaping our school's future and encourage them to participate in our transformation process. Throughout the school year, several events are hosted that invite parents and stakeholders into the school to support learning and bridge the partnership between the

school and the community. These events include Grandparents' Day, quarterly parent meetings, Field Day, volunteer hours/credits completion, and forthcoming events such as math, science, and literacy nights.

In conclusion, LEAD Academy remains steadfast in its commitment to providing a high-quality education despite the unique challenges posed by the COVID-19 pandemic and the subsequent designation as a Comprehensive Support and Improvement (CSI) school. While the past few years have presented obstacles, they have also been instrumental in driving positive change and growth within our institution. We have recognized the need for improvement and taken proactive steps to address it. Through strategic measures such as hiring additional personnel, implementing specialized intervention programs, and fostering community engagement, we are determined to raise our academic standards and ensure the success of our students if allowed to continue our charter. As we continue this transformative journey, we are optimistic about the future and our ability to provide an enriching educational experience that empowers our students to thrive and excel.

Attachments

Section 1: Academic Performance

1.1	LEAD vs MPS and Charter Schools State Testing Data	Webster, Danielle, 9/26/23 2:24 PM	PDF / 176.518 KB
1.2	LEAD vs MPS data	Webster, Danielle, 9/26/23 5:26 AM	PDF / 91.3 KB

2. Financial Performance

Near-Term Measures as of 9/25/2023

- **9.30%** Current Ratio measures a school's ability to pay its obligations over the next 12 months (calculated as the ratio of short-term assets to short-term liabilities).
- **49.12 days** Unrestricted Days Cash on Hand indicates how many days the school could operate without receiving additional funding (calculated as the school's total cash divided by the average daily cost to operate the school).
- **91%** Enrollment Variance shows how well the school is meeting enrollment projections (calculated as actual enrollment divided by enrollment projected in the school's board-approved budget).
- **Not in default** Debt Default indicates whether a school is meeting debt obligations or covenants.

Sustainability Measures

- **.05** Operating Margin measures a school's revenues compared to its expenses—i.e., did the school operate at a surplus or deficit in the given time period?
- **.11** Debt to Asset Ratio compares the school's financial liabilities to its assets.

See attached Financial Performance Data 9.25.23 for more information.

LEAD has been conservative with our expenses. The Board Approved 2023-2024 budget is

attached. Even with the CNP repayment, LEAD has positioned itself to meet the school's financial obligations and the CNP repayment within the state-approved plan, as outlined in the projected 5-year renewal budget. The most recent Annual Performance Report states that we "Do Not Meet Standards" due to the CNP findings regarding financial sustainability. We have shown that we can repay ASLDE without impacting the school's sustainability or negatively impacting students academically due to lack of funding.

The CNP issues are addressed in the Organizational Performance of this application. Due to the additional line-item funding from the state, LEAD will ensure that the students are not left behind due to the repayment plan. Much time and effort has been spent managing the budget, accounts payable, accounts receivable, and payroll expenses. The CSFO position is a difficult one for schools to fill. Therefore, we have chosen to utilize the back-office support of New Schools for Alabama. They function as our CSFO, accounts payable, accounts receivable, Federal Programs Director, and eventually our payroll support. A third party, GMS, currently manages our payroll to provide our employees with a strong health insurance plan, allowing us to have lower rates for our employees in a group of 1,000 people. We pay a portion of their health benefits, 100% of secondary health insurance, and match up to 5% towards their retirement. This allows us to provide solid employee benefits since we are not members of RSA as irrevocably approved in our original Charter.

Attachments

Section 2: Financial Performance

2.1	Financial Performance Data 9.25.23	Estill, Erik, 9/25/23 8:51 PM	PDF / 37.969 KB
2.2	FY 24 Budget	Estill, Erik, 9/25/23 4:29 PM	PDF / 6.394 MB

3. Organizational Performance

The Performance Framework for Organizational Performance states that all standards were met except the Financial Management and Oversight. This area was addressed through our corrective action plan with ALSDE and through the repayment plan for the money that the Food Service Management Company defrauded of LEAD. We take responsibility for the oversight of the previous administration who managed the CNP program.

When checks and balances and in-house audits are conducted sparingly, it leaves room for unfortunate errors. In this case, an unknowingly substantial financial error occurred. LEAD has been working diligently to resolve the issue of repaying \$1.9 million to the federal government due to previous leadership. With a repayment plan in place, we have made a substantial payment, continue to make quarterly payments, and have placed \$1,000,000.00 into a money market to earn interest for the final payment due at the end of the 2026-2027 school year. We have worked to develop a feasible payment plan to meet our financial obligations without compromising the quality of education provided to our students. Like any new business, finding the right people for the job takes time. Once this unfortunate circumstance was brought to the attention of the new leadership team, these errors began being corrected immediately. We have worked with the CNP Department of ALSDE to train staff, including a new CNP Director hired immediately following the audit, and to ensure we implement a successful corrective action plan.

The issues from the CNP audit were related to offsite meals served by the FSM Company, Crave.

The owner used the loopholes with the USDA Feed Every Child mantra to over-claim and serve meals we could not verify, causing the need for repayment. This will not happen again with our new systems and procedures in place. The meals served onsite to the LEAD students, which we were overseeing, were not the issue from the audit. The oversight issue came from the sites that Crave was serving, which, in hindsight, we should have had a school employee at each pick-up day (pandemic feeding of students). Had we been aware that this was necessary, we would have stopped it sooner because we did not have the staff to attend these sites. The former LEAD Operations Director believed that Crave was providing the correct data for his input into the system. It was brought to the attention of the Executive Director that Crave was editing the data in the state system. The ED ended this practice as soon as it was made aware, but the damage was done.

The appointment of our new CNP director in February 2022 reflects our commitment to ensuring that financial records are kept meticulously and in compliance with all relevant regulations. With her expertise and experience, we are confident that they will play a pivotal role in streamlining our financial practices and safeguarding the integrity of our Child Nutrition Program. As part of the CNP director’s responsibilities, she has implemented robust measures to maintain accurate documentation of all financial records, including diligently recording all financial transactions, expenditures, and revenue generated through the program. Furthermore, she has taken prompt action to respond to any documentation requests made by relevant authorities, showcasing our commitment to transparency and accountability.

Though we cannot go back in time and fix these errors, we can show improvement. In this case, LEAD Academy has shown improvement, and our new CNP Director communicates regularly with the ALSDE/CNP to be sure this mistake never happens again. We aim to create a financially sustainable environment that empowers us to fulfill our educational mission and continue providing high-quality services to our students and community. We hired a new Food Service Management company through a consortium with New Schools for Alabama, a company that only works with schools and under federal CNP guidelines. This has ensured that we do not encounter the same issues with food purchasing, meal claims, and distribution. In addition to these improvements, the new Director of Operations meets weekly with the CNP director to review accurate data and provide CNP updates necessary to stay in compliance.

The courts have agreed with LEAD Academy that we were defrauded, but unfortunately, that does not excuse the oversight issue that has since been corrected. We have won a lawsuit, appeals, and final judgment against Crave Cafe and Brian Pleasant for \$1,982,383.48. Our attorneys have begun the process of collecting this debt to LEAD.

Attachments

Section 3: Organizational Performance

3.1	CNP Corrective Action Plan 3 of 3	Estill, Erik, 9/25/23 3:25 PM	PDF / 23.94 MB
3.2	CNP Corrective Action Plan 2 of 3	Estill, Erik, 9/25/23 3:25 PM	PDF / 8.35 MB
3.3	CNP Corrective Action Plan 1 of 3	Estill, Erik, 9/25/23 3:25 PM	PDF / 6.27 MB
3.4	LEAD Corrective Action with Auditor	Estill, Erik, 9/25/23 3:17 PM	PDF / 1.024 MB

3.5	Final Appeal by Brian Pleasant denied	Estill, Erik, 9/25/23 3:11 PM	PDF / 82.915 KB
3.6	Attorney Letter	Estill, Erik, 9/25/23 3:11 PM	PDF / 352.856 KB
3.7	Judgement against Brian Pleasant	Estill, Erik, 9/25/23 3:11 PM	PDF / 132.222 KB
3.8	Judgement against Crave Cafe	Estill, Erik, 9/25/23 3:11 PM	PDF / 132.231 KB

4. Other Performance

LEF and LEAD Academy are requesting a 5-year renewal of our Charter School. We have had challenges due to the pandemic impacting the first three years of our existence and experienced the oversight issue of the CNP Program, which has been corrected. However, we have shown growth and desire by our community to provide a public school option other than the alternatives available to them.

We have several partnerships, the first being the Alabama International (Korean) AIKEEP Economic Education Program, which provides a foreign language teacher for our 8th and 9th grade students. They also provide Korean lessons weekly to the 5th-7th grade students. With Hyundai and all their subsidiaries and Korean complimentary businesses in Montgomery, we are working to provide future employees to these businesses.

Two other partnerships are with Auburn University Montgomery (AUM) and Alabama State University (ASU) through the placement of student teachers with our experienced certified teachers who have retired from the state system. We are working with Trenholm and Troy University for similar agreements, including seeking opportunities from these schools for dual enrollment once our high school has 10th through 12th grade.

LEAD also utilizes the support of ALSDE through their coaches, Education Specialists, Federal Programs, CNP staff, curriculum and instruction staff, and certification support, to name a few. We are committed to utilizing the support from ALSDE to remain compliant and do what is best for LEAD and the scholars.

We partner with the Montgomery Helping Family Initiatives through the district attorney's office. This partnership provides support for attendance, chronic absenteeism, and behavior and helps families find ways to improve attendance overall.

Attachments

Section 4: Other Performance

4.1	MOU MHFI	Webster, Danielle, 9/27/23 3:26 PM	PDF / 258.818 KB
4.2	LEAD/AKEEP Teacher MOU	Estill, Erik, 9/26/23 1:46 PM	PDF / 813.05 KB
4.3	AUM Agreement	Estill, Erik, 9/25/23 7:30 PM	PDF / 149.267 KB
4.4	AIEEP/AKEEP MOU	Estill, Erik, 9/25/23 7:28 PM	PDF / 512.532 KB

Looking to the Future

1. Adjustments to Performance Frameworks

External consultants Dr. Jody Ernst from Momentum Strategy & Research and Naomi Rubin DeVeaux from the National Charter Schools Institute reviewed our internal formative assessment data. They determined that LEAD Academy is providing a positive outcome for students, especially for students who have attended LEAD Academy for more than one year. The school is expanding and taking in new students in all grade levels. These students come from traditional Montgomery Public Schools; many perform poorly on the state report card. Therefore, it is unsurprising that students are coming to LEAD Academy below grade level.

The tables below summarize how far behind grade level the average student enrolled in LEAD Academy is at the beginning of each school year for 2021, 2022, and 2023, as well as the proportion of students new to the school that fall. In Fall 2021, students in first grade were scoring, on average, one year behind based on NWEA MAP, meaning that they were performing with skills as a nationally normed Kindergartener. For second and third-graders, they were 1 ½ years behind their peers. By sixth grade, the average LEAD student was three years behind the "typical" sixth grader nationally. Given the percentages of new students to lead at each grade each year, LEAD Academy's performance looks like it is dropping each year when it reflects the influx of new students to the school's community.

Table 1: Grade Level Equivalency in Math using NWEA-MAP

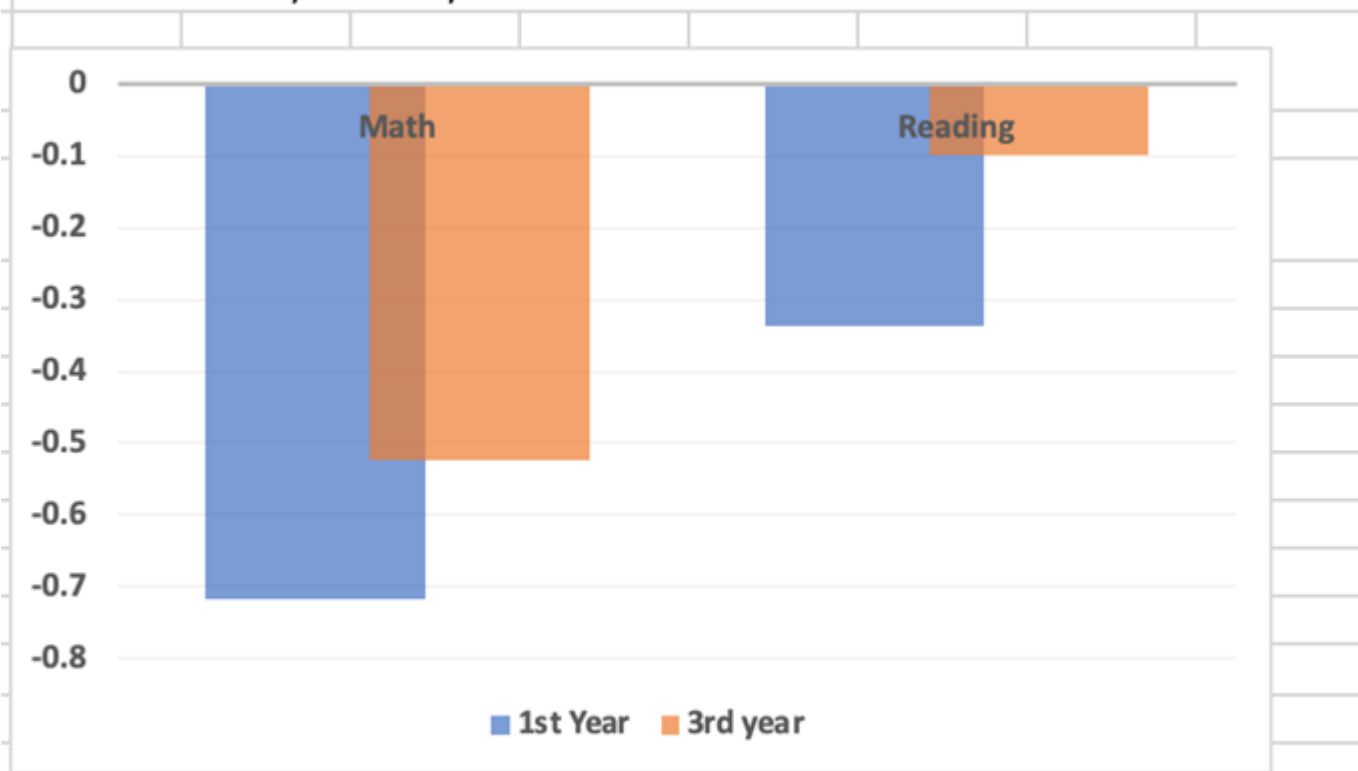
Difference Between Students' Grade and NWEA Grade Equivalent in the Fall of Each Year in Mathematics, and the Percent of Students that were New To Lead, By Grade Level						
Grade	Fall 2021		Fall 2022		Fall 2023	
	Difference	Percent New to LEAD	Difference	Percent New to LEAD	Difference	Percent New to LEAD
1st	-1	11%	-0.3	28%	-0.5	24%
2nd	-1.5	25%	-1	10%	-1	13%
3rd	-1.5	10%	-2	0	-1	15%
4th	-2	41%	-1.5	8%	-2	16%
5th	-2	31%	-1.5	7%	-2	11%
6th	-3	40%	-2	27%	-2	14%
7th	-3	19%	-3	11%	-3	20%
8th	-	-	-3	0	-4	17%
9th	-	-	-	-	-5	9%

The trend for English Language Arts is similar, though not as dire, in English, with students ranging from 1/3rd of a year to three years behind their peers nationally.

Difference Between Students' Grade and NWEA Grade Equivalent in the Fall of Each Year in Reading, and the Percent of Students that were New To Lead, By Grade Level						
Grade	Fall 2021		Fall 2022		Fall 2023	
	Difference	Percent New to LEAD	Difference	Percent New to LEAD	Difference	Percent New to LEAD
1st	-1	11%	-0.3	28%	-0.3	24%
2nd	-1	25%	-1	10%	-1	13%
3rd	-1	10%	-1.3	0	-1	15%
4th	-1.5	41%	-1	8%	-2	16%
5th	-2	31%	-1.3	7%	-1.5	11%
6th	-2.5	40%	-2	27%	-1.5	14%
7th	-2	19%	-2	11%	-2.5	20%
8th	-	-	-1.3	0	-3	17%
9th	-	-	-	-	-3	9%

According to NWEA-MAP, students who are between -1 and +1 are all within the range of "normal growth." The analysis of NWEA growth data shows that the longer students attend LEAD Academy, the more they gain academic skills. The figure below shows how well students who begin the year with the same starting skill level grew compared to academic peers who started with the same skill level and in the same grade.

Figure Title: Comparison of Student Growth in Math and Reading among Students Enrolled with LEAD Academy for 1 vs 3 years



Note: A score of zero means students are growing exactly as expected, however, growth scores between -1 and +1 are considered normal growth.

Both groups of students who have been enrolled for one year, as well as those who have attended LEAD for three years, show expected gains, but those enrolled for three years are showing better gains (closer to zero) than those who have only been with LEAD for a single year. In conclusion, the analysis supports that the longer students attend LEAD, the more likely they will make academic progress.

Once LEAD Academy is granted renewal, LEAD Academy leadership will engage with the National Charter Schools Institute's A-GAME initiative to design a framework responsive to LEAD's community. The framework will be built off of the state's framework and will ensure that students attending LEAD outperform the other choices available in Montgomery.

An example of the goals is provided below. The mission-specific goals may change as we work to identify STEAM's impact on our families and students that is not captured in the state's academic achievement and growth and attendance indicators alone.

Type	Accountability Indicator	Metric
ALSDE	Academic Achievement	Percent of "Academic Achievement" on ACAP as Reported on State Report Card
ALSDE	Academic Growth	Percent of "Academic Growth" on ACAP as Reported on State Report Card
ALSDE	Chronic Absenteeism	Percent of students missing 18 or more days as Reported on State Report Card
Mission Specific	NWEA Growth--ELA	Percent of students who are meeting their conditional growth percentile expectations
Mission Specific	NWEA Growth--Math	Percent of students who are meeting their conditional growth percentile expectations
Mission Specific	Student re-enrollment rate	The percent of eligible students who return to the school from previous year to current year.

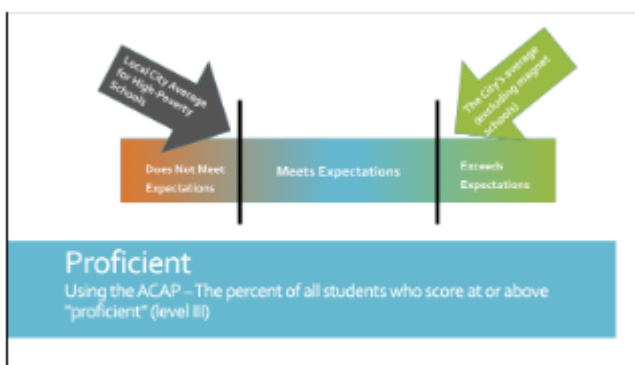
ALSDE Accountability Indicators, Metrics, and One Mission-specific Goal

The goals will be developed on a continuum, with the floor set at a minimum threshold of performance to be attained in order for the school to be considered meeting its goals.

- Below expectations – This will likely be set below the city's average performance for non-magnet schools.
- Meets expectations—This will be the performance span between the floor and the target.
- Exceeds expectations—This will be a target for the school to meet, such as the city's magnet school average, as an example. This could also be set at national standards or beyond.



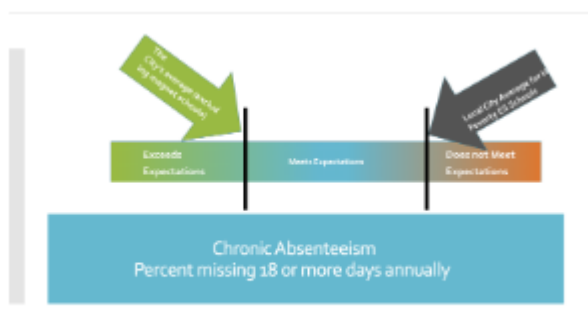
One goal will be based on student achievement or "proficiency" on the state assessment. For example, the proficiency rate may be determined with the floor being similar schools demographically and the target being the city's average (excluding magnet schools).



Likewise, growth will be compared to similar schools demographically and push LEAD Academy to outperform all other options available to families in Montgomery.



Finally, chronic absenteeism will be based on the state-calculated rate but compare the school to similar schools demographically. In this case, the floor is to the right, and the target is to the left, as a lower chronic absenteeism rate is preferable.



More goals will be developed that capture the school's mission. Finally, the contract will include a table similar to the one below, with precise ranges to show school performance.

Type	Indicator	Metric	Below	Meets	Exceeds
ALSDE	Academic Achievement	Percent of "Academic Achievement" on ACAP as Reported on State Report Card	0-XX%	XX-XX%	XX-100%
ALSDE	Academic Growth	Percent of "Academic Growth" on ACAP as Reported on State Report Card	0-XX%	XX-XX%	XX-100%
ALSDE	Chronic Absenteeism	Percent of students missing 18 or more days during a school year	100-XX%	XX-XX%	XX-0%
Mission Specific	?	?	0-XX%	XX-XX%	XX-100%

Proposal to Commission
Will provide within 60 days

Attachments

Section 1: Adjustments to Performance Frameworks

1.1	Grading, Promotion, and Retention Policy	Webster, Danielle, 9/26/23 1:27 PM	PDF / 6.265 MB
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2.Changes to School's Current Model

a. Educational Plan

i. The educational program at LEAD Academy will continue to strongly emphasize the core academic subjects required by the state (Math, Reading/ELA, Science, and Social Studies) in conjunction with our STEAM program. During the 2022-2023 school year, teachers' schedules reflected additional time in reading and math to meet the requirements of the Alabama Literacy Act and the Alabama Numeracy Act. Increasing instructional time is a targeted initiative to provide students with quality whole-group and small-group instruction and interventions using strategic teaching and research-based instructional strategies. Our mission at LEAD Academy has been and will continue to be to "provide innovative programs designed to spark curiosity, maximize learning potential, and continuously improve student achievement by empowering them with 21st-century skills. We are committed to ensuring that every child is given the tools they need to be knowledgeable, productive, and well-rounded citizens, capable of leading themselves and our community effectively." Our vision entails "building leaders by engaging students, focusing on high achievement, and developing the whole child. Our holistic approach aims to nurture knowledgeable, productive, and well-rounded citizens who can contribute positively to our community and beyond."

ii. Academic Program -LEAD's curriculum is research-based and aligned with state standards. Our core curriculum is selected from a list provided by the Alabama State Department for grades K-3 for reading and intervention. Teachers develop their lessons using the most current Course of Study Standards, ensuring students are taught and assessed using standards-based measures in alignment with the state's standardized assessments. LEAD Academy focuses instruction on Webb's Depth of Knowledge, which includes four content areas of knowledge acquisition which focuses on recalling and reproducing data, definitions, details, facts, information, and procedures; knowledge application, including the use of academic concepts and cognitive skills to answer questions, address problems, accomplish tasks, and analyze texts and topics. Knowledge analysis involves thinking strategically and reasonably about how and why concepts, ideas, operations, and procedures can be used to attain and explain answers, conclusions, decisions, outcomes, reasons, and results. Lastly, knowledge augmentation allows students to think extensively about what else can be done, how else learning can be used, and how they could personally use what they have learned in different academic and real-world contexts. In attention to Webb's Depth of Knowledge, LEAD will utilize the Multi-tiered Systems of Support (MTSS) to meet students' academic, attendance, and behavioral/social-emotional needs. We aim to implement a curriculum fostering critical thinking, creativity, and problem-solving skills. We desire a curriculum model that contains the following while incorporating:

Integrated Project-Based Learning - a core pedagogical approach that encourages students to apply their knowledge to real-world problems and projects. All students will complete at least one project per grading period. This practice is aligned with our Grading, Promotion, and Retention Policy Manual.

21st-Century Skills Development - We prioritize the development of 21st-century skills, including communication, innovation, collaboration, critical thinking, creativity, and digital literacy and technology integration. Technology integration is a fundamental part of our curriculum, preparing students for the digital age.

Individualized Learning - We recognize that each student has unique needs and abilities. Our teachers employ differentiated instruction to cater to diverse learning styles and abilities. We can tailor education to each student's growth trajectory through regular assessment and data-driven instruction.

Enrichment and Extracurricular Activities - A wide range of enrichment programs and

extracurricular activities, such as robotics, arts, music, sports, and community service, are available to students. These activities complement the academic program, providing opportunities for holistic development. Additionally, we have included after-school programs and summer enrichment that aim to close the skill gaps in learning using innovative teaching strategies.

Character Education - We prioritize character education, fostering values like integrity, empathy, resilience, and responsibility. Through programs like peer mentoring, conflict resolution, and community service, we instill the qualities of well-rounded citizens and future leaders.

Community Engagement - We actively involve parents, caregivers, and the community in our educational process through regular communication, volunteer opportunities, and family engagement events. We encourage students to actively contribute to the community through service learning projects.

Assessment and Continuous Improvement - We regularly assess student progress and use data to inform instructional decisions. Our staff participates in ongoing professional development to stay current with best practices in education.

Leadership Development - We offer leadership programs and opportunities for students to develop leadership skills and take on roles of responsibility within the school.

Social/Emotional, Wellness, and Well-being - We prioritize our students' physical and emotional well-being, providing access to counselors, health education, and a supportive school environment.

Partnerships: We collaborate with local businesses, organizations, and higher education institutions to enrich the educational experience and provide real-world learning opportunities. We will also continue to partner with parents and the community by providing them with the resources and support needed to participate in the school actively.

This academic program is designed to align with our school's mission and vision, providing a solid foundation for fostering knowledgeable, productive, and well-rounded citizens who can lead themselves and their community effectively.

LEAD continues to set goals to improve the following initiatives to improve academic performance, as well as meet the social/emotional needs of each student:

STEAM Education - LEAD Academy's commitment to STEAM education is central to our academic program. This approach integrates science, technology, engineering, arts, and mathematics into interdisciplinary learning experiences implemented in the classrooms and the STEAM portal during designated times. It cultivates creativity, critical thinking, and problem-solving skills essential for the future workforce. LEAD is one-to-one with technology, allowing students to research and explore various educational topics and work according to their individualized learning needs.

Extended Reading and Math Blocks - We have implemented extended reading and math blocks to meet the requirements of the Alabama Literacy Act and Alabama Numeracy Act. These blocks provide students additional instructional time and targeted support to improve literacy and numeracy skills, ensuring they meet grade-level standards.

Support Staff - Recognizing the importance of personalized support, we have hired additional staff to enhance our students' academic and social-emotional well-being. These staff members include:

- *General and Special Education Paraprofessionals* - These professionals work alongside teachers to provide tailored interventions and support within the classroom, ensuring that all students receive the attention they need to succeed.

- *Behavioral Specialist* - In response to increased behavioral challenges, we have employed a behavioral specialist who focuses on developing and implementing preventative strategies to address behavior issues, creating a more conducive learning environment.

- *Mental Health Services* - Acknowledging the impact of the pandemic on students' mental health, we offer general counseling and mental health services. Our goal is to ensure that students are emotionally healthy, enabling them to perform their best academically.

- *Alabama International Korean Education and Economic Partnership (AIKEEP)* - Our AIKEEP program promotes cultural diversity and partnerships. These initiatives expose students to diverse cultural experiences and collaborations that broaden their horizons and enrich their learning from multicultural perspectives.

iii. *Special Student Populations* - LEAD Academy believes in offering an inclusive environment where every student has equal access to what they need. Currently, we have 63 students identified under IDEA, 11 students identified as gifted, 8 English Language Learners, and 14 students who receive accommodations under Section 504. For the students identified under IDEA, a large majority receive at least 80% of their services with their non-disabled peers inside of the general education classroom, where they are supported by a special education paraprofessional. Each student receives services according to their Individualized Education Program (IEP) in the general education classroom or the resource room. Our EL students receive services, accommodations, and support according to their IELPs. As a school, we would like to double our current gifted population within the next year or so. Our contracted gifted specialist is working to educate our teachers and staff on identifying characteristics of giftedness and the process of submitting school-based referrals. LEAD Academy's current student population is 91.3% African-American, 2.5% caucasian, 2.3% Hispanic, less than one percent Asian and Pacific Islander, and 3% other. In the future, LEAD hopes to increase the diversity of its student population. Increasing diversity among students is crucial as it fosters a rich and inclusive learning environment where students from varied backgrounds bring unique perspectives, experiences, and ideas to the educational community. This diversity promotes cultural understanding and empathy and prepares students for a globalized world where collaboration and adaptability are essential skills. Additionally, diverse student demographics reflect the broader society, helping to break down stereotypes and prepare students for a more inclusive and equitable future. Also, in the future, as determined necessary by students with disabilities, Individualized Education Programs (IEPs), LEAD will have a self-contained classroom designed to meet the unique needs of students with IEPs with language, behavioral, or significant cognitive disabilities.

Goal: Conduct Child Find activities and educate teachers and staff on identifying giftedness to increase the number of students identified as gifted from 11 to 22 within the next two years, as measured by Gifted Child Find data.

Goal: Use robust advertising initiatives to attract and increase our diverse student (ethnic groups) population to at least 30% by the fourth year, as measured by enrollment data.

iv. *Assessments* - State and district-wide assessments help to inform instruction within the district. LEAD will participate in state-wide standardized assessments implemented by the state of Alabama. LEAD will participate in state-approved assessments per the Alabama Literacy Act for kindergarten through third grade. Kindergarten through fifth grade will participate in district-approved assessments that meet the requirements according to the Alabama Numeracy Act. LEAD will continue to employ district-wide assessments such as NWEA Map for grades four

and above for reading and sixth and above for math. For the grades that do not fall within the Literacy or Numeracy Act, district-wide assessments will continue to be evaluated to determine if it is aligned with the most current ELA, Math, and Science standards to ensure we are accurately measuring student's achievement and proficiency according to our state's standards. We will continue to employ a robust assessment system that includes regular formative and summative assessments in the Fall, Winter, and Spring to track student progress and ensure academic growth. All of the students participate in the required state assessments. After each assessment window, families will be provided with the data, and parent meetings will be hosted to explain the data and the next steps. We are committed to transparent accountability measures and continuous improvement to address areas of need.

Goal: Increase ELA Proficiency (31.03%) on the state assessment from the 2022-2023 school year performance data to at least 65% proficiency within the next two years measured by state assessment data.

Goal: Increase Math Proficiency (2.38%) on the state assessment from the 2022-2023 school year performance data to 60% proficiency within the next two years measured by state assessment data.

v. School Climate and Discipline - During the 2022-2023 school year, members of the Office of School Improvement conducted a comprehensive instructional review for both the Primary and Intermediate Building. Both schools were rated according to four domains: Effective Leadership, Talent Development, Instructional Transformation, and Culture Shift. The audit report identified that Effective Leadership and Talent Development were Developing, our Cultural Shift was Effective, and Instructional Transformation was Ineffective. We will enhance our proficiency in Instructional Transformation by implementing innovative teaching methodologies and technology integration to create engaging and effective learning experiences for students, ultimately improving their academic performance and fostering a deeper understanding of the subject matter. LEAD will also employ a robust Positive Behavioral Intervention System (PBIS) to reduce the number of student office referrals and punitive practices and replace them with positive interactions among students and teachers. This school year, a behavior interventionist was hired to champion this initiative and ensure implementation fidelity for positive outcomes that impact student behavior, academics, and attendance.

Goal: Reduce the number of out-of-school suspensions based on the 2022-2023 data by 30%, as measured by disciplinary data reports within the next two school years.

B. Organizational Plan

School Calendar and Daily Schedule

LEAD Academy will continue the number of days in the school calendar for students to be 180 days. Teachers will work 187 days, which includes Professional Development days. The school year will continue to be divided into four quarters, and each quarter will be approximately nine weeks. After each nine weeks, scholars will be issued a report card, and teacher-parent conferences will be set up four times a year immediately after each nine weeks to provide parents with one-on-one conferences about student progress.

The daily hours of operation will be from 7:45 A.M. to 3:10 P.M. However, the school will be open from 7:30 until 3:30. This allows additional time for scholars and an opportunity to participate in our no-cost breakfast program.

LEAD Academy will continue to offer teachers grade-level meetings time once a week. In addition to grade-level meetings, virtual planning meetings will occur once a month. These meetings will

allow the entire K-12 campus to plan and build a strong foundation through advanced learning in each class and grade level. Virtual planning in schools delivers a more smooth and organized way for students to be prepared for the next grade level.

As LEAD continues to grow, we will add more extracurricular activities. Currently, LEAD offers girls and boys basketball and track, cheerleading, and band. LEAD will expand to add girls' and boys' softball, chess club, student debate, theater, and STEAM club.

Additionally, LEAD Academy plans to offer Workforce Development and dual enrollment opportunities with local college campuses. *Dual enrollment* is an enrichment opportunity allowing eligible high school students to earn high school college credits for courses taken by authorized colleges and universities. This aligns with our vision to develop the whole child into knowledgeable, productive, well-rounded citizens.

*Please see the attachments for all current daily schedules.

Student Recruitment and Enrollment

LEAD Academy will continue to achieve racial and ethnic balance by being open to all students and openly marketing to every subsection of the potential student population. Marketing for enrollment is critical to the success of LEAD. The administrative team will continue to use Schola to recruit and assist with enrollment. Schola is an Education Technology company that provides specialized software solutions for families and schools to improve education outcomes. Schola helps families discover, connect, and enroll in the ideal educational setting and helps schools attract, commit, and nurture prospective families by optimizing the student recruitment process. The following may be used in addition to Schola:

- All social media platforms
- Radio Advertising
- Newspaper advertising
- Email marketing
- School website
- Custom brochures
- Current family connections

LEAD Academy requires all applicants to submit a timely application for admission. A random lottery is conducted if the number of applicants exceeds the maximum targeted enrollment. The lottery will take place fifteen days after the closing date of the application period. The application period for LEAD will always begin the third week in January and close the last working day in February.

Development of 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 names randomly until all names are pulled. As space becomes available, applicants will be called from the waiting list with the lowest number assigned.

Students accepted will be notified by letter within ten days, giving them instructions to call the school to confirm intent to enroll. All attempts to reach the family and, if connected, the response from the family will be documented. If the student has yet to confirm interest in enrolling within five business days of receiving confirmation of acceptance, the student will be placed at the end of the waiting list.

Returning Students

Returning students will be given priority in admission to the next academic year. Intent to Return letters will be sent home at the beginning of February and must be returned by the end of the enrollment period. LEAD will continue to follow the Alabama Charter School law as the children of founders, board members, and full-time employees receive preference.

Siblings of returning students will be exempt from the lottery if space permits. However, the application process must be followed.

Staffing and Human Resources

LEAD Academy will continue to utilize the Alabama State Department (ALSDE) Applicant Tracking Enterprise to recruit applicants. Additionally, the school website and social media platforms will be used. All applicants who work during school hours must complete a background check and be cleared by the ALSDE.

LEAD will continue to partner with local colleges' and universities' Teacher Education programs to recruit new teachers.

The Executive Director/Superintendent will approve all new hires before moving to Human Resources. The Executive Director will then present the candidate to the School Board for approval. The school bookkeeper will continue to handle all applicants' required paperwork before the start of official work.

The nature of the employment relationship will remain "at will." This means that at the sole discretion of the employer or employee, the relationship may be terminated with or without cause and with or without notice.

iv. Management and Operation

Please see the attached strategic plan

v. Parent and Community Development

LEAD Academy was designed to meet the Montgomery area's needs, which will continue to be a priority for LEAD. The following demonstrates how LEAD will continue to involve parents and community members:

- Community Forums- A series of four community forums (held quarterly) will provide opportunities for community members and parents to learn about school choice, charter schools, LEAD and to ask questions regarding planning, the charter renewal, and plans for LEAD Academy.
- School Board Meetings- Numerous community members, parents, and board members have attended school board meetings. The parents and community know the board meetings 48 hours in advance. However, parents and community members have access to a yearly calendar of monthly board meetings.
- Yearly Parent Surveys- Parent school surveys have assisted LEAD Academy with school management to build and maintain parent relationships. It has also helped alleviate parent concerns when its feedback acts upon results. The information collected helps the school learn about and understand parents' concerns, improve school programs and facilities, and usher in changes necessary in this dynamic environment.
- Parent Volunteer Hours- The school will encourage parent volunteerism by stating this expectation in our school handbook and other school documents where appropriate. We will

ask parents to volunteer for at least 10 hours/credits per school year. Students whose parents do not meet the required hours/credits will be placed in the lottery for seat assignment for the following school year.

c. Governance Plan

The LEAD Education Foundation (LEF) Board of Directors will provide the governance function, encompassing 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 efficiently and ethically in compliance with local and all other applicable state and federal laws and regulations.

The LEF is a 501(c)(3) with the IRS as a tax-exempt organization to organize and operate an Alabama charter school. The school is a non--profit corporation formed and organized under the applicable laws of the State of Alabama. The school is designated as an educational organization under Section 501 (c)(3) of the Internal Revenue Code.

Although the Board has the ultimate authority regarding the school operations, no member of the Board will be involved in the day--today operation of the school. The Board will approve budgets, set policy, and establish and approve procedures. The Executive Director will ensure that the financial and administrative management of the school meets regulatory requirements, maintains sound fiscal standards, remains financially viable, and ensures compliance with Alabama laws and terms of the Charter Contract and compliance with ALSDE.

i. Governing Body

The Board of Directors will specifically review and monitor student achievement performance data, monthly financial statements, and 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 adopted by--laws that govern the Board and the School, and all actions taken will be consistent with those by--laws.

ii. Governing Board Composition

LEAD Academy has a wide range of board members who contribute a wealth of knowledge from all backgrounds and skills.

Please see attachment

d. Business and Financial Services

LEAD Academy has an agreement with New Schools for Alabama (NSFA) to assist with all back-office services. The term of this agreement shall be January 1, 2023, through September 30, 2027. The contract may be extended by mutual written consent. After September 30, 2024, either party may terminate this agreement for any reason with at least ninety (90) days written notice. This agreement will assist with making sure LEAD Academy stays in compliance with all business and financial services.

See attachment

i. Budget

*See the Financial Performance and Projected Budget sections.

ii. Financial Management

*See the Financial Performance and Projected Budget sections.

iii. Facilities

When the renewal application is approved and granted for an additional five years, LEAD Academy will purchase the current property at 2897 Eastern Boulevard. After purchasing the property, LEAD will add additional portables to support the number of high school students until official plans can be made to purchase an additional building at a separate location.

Please see the attachment.

iv. Transportation

At this time, LEAD Academy does not provide transportation. LEAD Academy plans to partner with local school districts or contract with local transportation companies when transportation is needed.

v. Insurance

See attachment

vi. Food Service

LEAD Academy will continue to participate in the SLA Food Service Management Consortium. SLA has meal programs custom-designed to meet the needs and goals of the schools, districts, and communities they serve. The team is composed of talented, dedicated food service professionals passionate about what they do. SLA is a family with team members who genuinely care. SLA Management is engaged in every community we serve, striving to help teach our children how to eat healthier.

Additionally, LEAD will continue to follow guidelines set by the Alabama Child Nutrition Program (CNP). Alabama Child Nutrition Staff manage and implement United States Department of Agriculture (USDA) Child Nutrition Programs in Alabama's schools and preschool facilities. Staff interpret federal and state policies and laws; provide technical assistance and complete program audits; allocate USDA donated foods; ensure procurement of high quality and cost-efficient food products compliant with regulations.

e. Education Service Providers

LEAD Academy does not utilize a third-party education service provider.

Attachments

Section 2: Changes to School's Current Model

2.1	Intermediate Teacher Schedules	Webster, Danielle, 9/27/23 3:54 PM	PDF / 5.633 MB
2.2	Primary Teacher Schedules	Webster, Danielle, 9/27/23 3:54 PM	PDF / 121.026 KB
2.3	E. Hill Resume Board Member	Webster, Danielle, 9/26/23 1:45 PM	PDF / 123.652 KB

2.4	T. Hughes Resume Board Member	Webster, Danielle, 9/26/23 1:45 PM	PDF / 195.881 KB
2.5	S. McCall Resume Board Member	Webster, Danielle, 9/26/23 1:45 PM	PDF / 128.31 KB
2.6	K. Robertson Resume Board Member	Webster, Danielle, 9/26/23 1:44 PM	PDF / 163.6 KB
2.7	J. Dickey Resume Board Treasurer	Webster, Danielle, 9/26/23 1:44 PM	PDF / 338.825 KB
2.8	C. Meadows Resume Board President	Webster, Danielle, 9/26/23 1:44 PM	PDF / 782.196 KB
2.9	LEAD Strategic Plan	Webster, Danielle, 9/25/23 8:29 PM	PDF / 1.053 MB
2.10	NSFA back office agreement contract	Webster, Danielle, 9/25/23 8:02 PM	PDF / 235.627 KB
2.11	Educator Insurance	Estill, Erik, 9/25/23 8:01 PM	PDF / 2.477 MB
2.12	Parent Survey Results	Webster, Danielle, 9/25/23 7:23 PM	PDF / 210.114 KB
2.13	Purchase and Sales Agreement	Estill, Erik, 9/25/23 5:23 PM	PDF / 3.767 MB

3.Other

The school is currently working to find a facilities solution for the high school and the finalization of the purchase of the current facility. We are working with New School Facility Partners to manage this process and help us find the best funding options that fit within our projected budget. We want to add more portable buildings for the high school until a long-term solution can be established. Our remaining PSCA funds will used towards the down payment of the property.

We are also working with AKEEP/AIKEEP to try and obtain a partnership with Hyundai that can be used to create vocational support for our high school students. This desired partnership will allow LEAD students and Hyundai employees to learn from each other, develop new skills, provide STEAM support for LEAD, and create a workforce for Hyundai.

Attachments

Section 3: Other

3.1	Purchase and Sale Agreement	Estill, Erik, 9/27/23 2:39 PM	PDF / 3.767 MB
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Exhibits

1. Projected Budget

During the initial charter term, LEAD has successfully navigated the startup period, seen extraordinary demand for seats (almost 800 students currently), secured a permanent facility ready to purchase, and has a cash balance of approximately \$1.2 million or more than 40 days cash.

The attached budget covers the entire five-year renewal period. It has been prepared conservatively, and anticipated growth demonstrates a sustainable long-term financial picture, including the repayment of the food service agreement with the ALSDE over three years.

LEAD also has a signed purchase agreement contingent upon renewal that will allow the school to exit the lease structure and own its facility – reducing annual facility costs by at least \$150k/year and allowing for expansion. The planned expansion includes a modular campus to service the high school grades and provide more space for growth in K-8.

Staffing will expand from 80 staff members to over 115 five years later. New positions include high school teachers, high school administration, additional custodial staff, a second school resource officer, CTE teachers, foreign language staff, and art and band teachers. Careful consideration was made as to when each position should be added throughout the 5-year renewal to meet the needs of the students and maintain a fiscally sound budget.

Enrollment is projected to grow from 800 to nearly 1,250 students over the next five years, and the school continually has an extensive application backlog and waitlist.

Revenues are projected using the last five years of confirmed revenue information from the ALSDE and are adjusted upward based on enrollment projections and a conservative inflation adjustment of 3%. The model is conservative and contains no local tax funding sources.

Expenses are projected based on the last five years of history and can be accurately projected. Costs are budgeted at 3% annual increases (matching revenues), but certain instructional costs are increased at 10% annually to compensate for variable costs like textbooks, classroom consumables, and other instructional materials.

The school's five-year projection for renewal evidences net margins of 1-3% annually. It demonstrates a cash balance of approximately \$1.5 million, or 44 days cash at the end of the renewal period, exceeding the state recommendation of 30 days cash.

The projected budget is conservative and shows that LEAD has financial sustainability due to our conservative approach. As we grow, the student enrollment numbers will sustain the growth in the subsequent years. The enrollment demands for LEAD have shown that we will continue to meet the maximum enrollment to sustain LEAD financially. With the sunset of ESSER funds, there is still a need to receive grants from private organizations and through philanthropic endeavors.

The quarterly payments for the CNP repayment and the final lump sum at the end of the 2026-2027 school year are budgeted. They will not negatively impact the overall sustainability of the budget or LEAD Academy.

Attachments

Section 1: Projected Budget

1.1	5-year Projected Budget	Estill, Erik, 9/27/23 2:37 PM	XLSX / 147.49 KB
1.2	LEAD FS 20	Webster, Danielle, 9/6/23 4:02 PM	PDF / 1.474 MB
1.3	LEAD FS 21	Webster, Danielle, 9/6/23 4:02 PM	PDF / 1.871 MB
1.4	LEAD FS 19	Webster, Danielle, 9/6/23 4:01 PM	PDF / 551.259 KB

2. Alabama Continuous Improvement Plan

The purpose of the ACIP is to guide the school improvement effort of the school. LEAD Academy has a team that collaborates to address the needs of the local school. This team includes the principal, guidance counselor, district school improvement specialist (or other designees), teachers, parent representatives, and student representatives (as appropriate). Depending on the data, additional members may include special population representatives (Technology Coordinator, Special Education, ELL), district federal programs coordinator, district chief school financial officer, community stakeholders, or any other member as appropriate. It is reviewed regularly and revised in response to the school's progress on the identified goals and strategies.

This document is an ongoing working document for LEAD Academy that guides the school for school improvement efforts. We review it regularly and revise it as needed in response to the school's progress on the identified goals and strategies. Due to the addition of Comprehensive School Improvement (CSI) funds, the ACIP is continuously monitored for alignment and needed changes based on students' data and available resources.

Attachments

Section 2: Alabama Continuous Improvement Plan

2.1	ACIP Part 1	Webster, Danielle, 9/20/23 3:41 PM	PDF / 61.073 KB
2.2	ACIP Part 2	Webster, Danielle, 9/20/23 3:41 PM	PDF / 88.268 KB

3. ESSER Plans

Files attached

Attachments

Section 3: ESSER Plans

3.1	LEAD Academy CARES/ESSER	Webster, Danielle, 8/29/23 3:40 PM	PDF / 922.837 KB
3.2	LEAD Academy Cares Act/GEER	Webster, Danielle, 8/29/23 3:39 PM	PDF / 1.029 MB

3.3	LEAD Academy ESSER II	Webster, Danielle, 8/29/23 3:38 PM	PDF / 728.411 KB
3.4	American Rescue Plan ARP ESSER	Webster, Danielle, 8/29/23 3:37 PM	PDF / 976.743 KB

4. Compliance Monitoring Report

The objective of the Compliance Monitoring program is to adequately monitor all K-12 school systems in Alabama for compliance with state and federal regulations and State Board of Education mandates. Monitoring ensures selected programs under ESSA meet federal guidelines and are implemented with fidelity, as outlined in the project application, to increase student achievement. Monitors look specifically at the programmatic regulations and the expenditure of funds. All findings have been corrected and continue to be monitored regularly.

Please see attachment

Attachments

Section 4: Compliance Monitoring Report

4.1	Compliance Findings Report	Webster, Danielle, 8/28/23 3:48 PM	PDF / 560.357 KB
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5. Accreditation Report and Quality School Review(s)

LEAD Academy is moving forward toward accreditation. LEAD has gained membership in Cognia and adheres to Cognia policies, standards, and assurances for accreditation. We have submitted all reports and demographic updates within the prescribed timeframes. Additionally, we have paid all required fees within the prescribed timeframes to proceed with the process. After meeting these general requirements, we must meet the accreditation requirements.

Currently, we are completing our candidacy workbook. This process ensures that we meet the appropriate accreditation Standards and Assurance set. Our projected timeline:

January 2024 - Complete Candidacy Workbook

March 2024 - Initial walkthrough/interviews at school

May 2024 - Participate in Accreditation Training

September/October - Engagement Review

Quality Review Response:

The two areas of concern, the Cognia Report and the CNP Audit, are addressed in this narrative. The validity of the Cognia Report causes great concern because the initial monitor we met with explained that she did not do the report and that the reports were turned over to a third party to complete. Since this is the case, that monitor should have contacted us for any information they felt was needed, all of which would have been provided. We have listed our concerns regarding the Cognia report in the response.

After reviewing the Charter School Evaluation results, we acknowledge the positives outlined and

recognized. However, we would like to seek clarification on areas of concern and inaccuracies.

Educational Programs

We find our current state report card numbers alarming and potentially demoralizing, especially given the heroic efforts of students to learn and educators' teaching in incredibly trying times virtually.

The cumulative impact of the COVID-19 pandemic on students' academic achievement has been immense, and many of LEAD Academy's students are not excluded.

Data reports that math and reading test scores across the first two years of the pandemic in grades 3-8 have fallen significantly. Research additionally states that average fall 2021 math test scores in grades 3-8 were 0.20-0.27 standard deviations (SDs) lower than same-grade peers in fall 2019, while reading test scores were 0.09-0.18 SDs lower. This is a sizable decrease.

This unfortunate crisis has caused us to become a CSI school. The positive to this outcome is that we have begun receiving assistance from numerous ALSDE departments that we need to help us with resources to get these students performing on grade level. We have also received tentative data from the state with our updated ACAP scores, which show that we should no longer be an "F" District overall but a "D" District. This is due to the intermediate school going from an "F" school to a "C" school due to significant growth on all measures. Our scholars continue to perform better than the local schools they would have attended.

None of us have ever lived through a pandemic, and there is so much we do not know about students' capacity for resiliency in these circumstances or a timeline for recovery.

However, there is work to do. LEAD Academy has constantly been working to make important decisions about which interventions and strategies to implement to mitigate the learning declines during the last few years. As mentioned, the district has spent many ESSER funds designated for academic recovery on various strategies, including additional intervention curriculums, summer learning, and after-school program initiatives.

Lastly, our most recent assessment data shows significant growth from previous years. Calculations estimate the overall district being moved from an "F" to a "D," and if compared to traditional surrounding K-5 schools, LEAD would be a "C" school.

Section V. Alabama Continuous Improvement Plan

While a plan for the 2021-2022 school year existed, the plan's implementation needed to be improved. These plans and assumptions were in place before current leadership could be given permission and access to edit them successfully. It became evident that, while the plan had potential, it had yet to be implemented to fidelity in the past. Immediate action was taken to address the gaps and rectify the situation, including creating a functional leadership team to maintain the original vision.

However, because of the need for correct implementation from the previous year, the team implemented and reviewed the 2022-2023 ACIP plan quarterly. Additionally, reevaluating the entire plan and making adjustments, engaging stakeholders in the planning process, and resources were in place to support the plan. As a result of these measures, we are pleased to report that the plan's implementation has significantly improved under current leadership. We have witnessed positive outcomes, and our team is dedicated to sustaining this progress as we move forward.

Professional Development

Although we were fully recognized and 100 % in compliance with the required state and federal training, also highlighted should have been the professional development opportunities that were arranged for the staff for instructional practices to improve student achievement and student engagement. However, the overlook of LEAD providing additional PD opportunities for teachers and staff should be recognized. Professional development before new leadership existed needed to be more evident. The improvements that are needed to focus on student improvement are currently evident. In the 2022-2023 school year, the district calendar noted 8 PD days for teachers and staff. In addition to the state-required training we comply with, teachers also participated in MTSS, tiered instruction, unpacking state standards, and using instructional strategies in the classroom to improve classroom instruction. New leadership has partnered with the Alabama State University (ASU) teacher in-service center to provide additional resources and PD for teachers and staff to receive. For the first time in LEAD's existence, a few teachers have been allowed to participate in the ALSDE Mega Conference, which is a week-long, in-person event that provides attendees with opportunities to engage in meaningful discussions, participate in in-depth training sessions and learn from leading experts across the education spectrum.

With constant improvements to come, we believe LEAD Academy is on the right path to grow our professional practices for teachers and staff.

CNP

Substantial financial errors can occur when checks and balances and in-house audits are conducted sparingly. LEAD has been working diligently to resolve the issue of owing \$1.9 million to the federal government due to previous careless leadership. We have worked to develop a feasible payment plan to meet our financial obligations without compromising the quality of education provided to our students. Like any new business, finding the right people for the job takes time. Once this unfortunate circumstance was brought to the attention of the new leadership team, these errors began being corrected immediately.

The appointment of our new director reflects our commitment to ensuring that financial records are kept meticulously and in compliance with all relevant regulations. With her expertise and experience, we are confident that they will play a pivotal role in streamlining our financial practices and safeguarding the integrity of our Child Nutrition Program. As part of the CNP director's responsibilities, she has implemented robust measures to maintain adequate documentation of all financial records. This includes diligently recording all financial transactions, expenditures, and revenue generated through the program. Furthermore, she has taken prompt action to respond to any documentation requests made by relevant authorities, showcasing our commitment to transparency and accountability.

Though we cannot go back in time and fix these errors, we can show improvement. In this case, LEAD Academy has shown improvement, and our new CNP Director communicates regularly with the ALSDE/CNP to be sure this mistake never happens again. We aim to create a financially sustainable environment that empowers us to fulfill our educational mission and continue providing high-quality services to our students and community.

Conclusion:

Though we are thrilled about the powerful positive evaluation results, we realize that many improvement opportunities should be immediately corrected. Additionally, we appreciate the opportunity to correct any inaccuracies presented in the report and provide feedback on what we have. We are currently working to improve these evaluation results, not only to be corrected on paper but to ensure we provide our students with the best education possible. We also want to

collaborate with any department that can assist us with informal quarterly audits to ensure we remain on the correct path. Not only have we faced challenges by opening during the pandemic, but we also deal with trauma, isolation, and poverty to mental health challenges our students have faced over the last two years. The disruption of school closures equated to resetting all K-12 schools, not just LEAD Academy.

School Calendar and Schedule

The school calendar has been developed based on Alabama state requirements. There are 187 instructional days, which includes days allotted for staff development. Teacher schedules reflect at least six hours daily, with 150 minutes allotted for reading/ELA and 60 minutes for math across the curriculum.

Special Population and At-Risk

According to compliance monitoring data from the 2022-2023 school year, the special education department has received 100% compliance with minor recommendations moving forward. Our ELL population has been screened, identified, and provided with appropriate services according to their IELP. Students performing below grade level were referred to the Problem-Solving Team for individualized academic and behavioral support.

Recruitment and Enrollment

Signage, school website, job fair, signing day

Financials Concerns Noted Response

LEAD Academy was defrauded by its food service provider, Crave Cafeteria Services, and its owner, Brian Pleasant. The ALSDE has determined that the amount of federal funds that must be repaid is \$1,873,088. The state has provided a five-year timeline to repay. The ALSDE has provided LEAD Academy flexibility in making these payments over time as they recognize it is a significant amount. LEAD sued the food service providers, Crave Cafeteria Services and Brian Pleasant, in November 2022 for fraudulently documenting federal meals served to substantiate excess billings to LEAD. Montgomery Circuit Court ruled in favor of LEAD in January 2023. Crave Cafeteria Services and Brian Pleasant subsequently appealed the court's judgment, and the appeal was dismissed in April 2023. LEAD has won two judgments against Crave Cafeteria Services and Brian Pleasant.

The Corrective Action Plan has been implemented to correct the oversight issue that arose with the previous administrator. These concerns have been and are still being addressed to ensure we do not have this problem again. The administrative review from the CNP department has approved the corrective plan, and we continue to strive for the best food service program we can provide our scholars as a Community Eligibility Program with such a high percentage of low-income families.

LEAD Academy has had challenges we have overcome, and we work diligently to build a better opportunity for our scholars. The CNP Audit and the Administrative Review have given us a better understanding of what was lacking in the program from previous CNP leadership. This has been corrected, and we monitor it daily. The scholars of LEAD Academy are showing significant growth. The community has proven that they want LEAD to provide their scholars a safe, civil, and different opportunity than Montgomery's other public school options. We have 800 scholars enrolled in grades K-9 for the 2023-2024 school year, with a waiting list of 500 scholars. LEAD Academy is showing growth with academics, operational procedures have significantly improved, and we are financially sound despite the CNP finding due to CRAVE.

Attachments

Section 5: Accreditation Report and Quality School Review(s)

5.1	Performance Report	Webster, Danielle, 9/25/23 2:41 PM	PDF / 1,014.256 KB
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Recommendation

School Name:	Lead Academy
Primary Contact:	Erik Estill
Submission Date:	September 29, 2023
Recommendation Date:	December 12, 2023
Recommended By:	Logan Searcy
Charter Status:	Granted

2 years