

Application Cover Sheet

General Information

Name of Proposed Charter School	Union Academy		
Sponsor/Sponsoring Entity	Union University		
Proposed Authorizer	Jackson-Madison County Schools		
Academic Focus of Proposed School	Faith-based Christian College Preparatory		
Grade Structure (e.g., K-5, 6-8, 9-12)	Year 1	Year 5	At Capacity
	K-5	K-9	K-12
Projected Enrollment	Year 1	Year 5	At Capacity
	320	530	780
Neighborhood and/or Community in which the school plans to locate	North Jackson, TN		
Projected Opening School Year	2027-2028		

Primary Point of Contact for this Application

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

Name	Dr. Teresa Tritt
Role in Proposed School	Temporary Executive Director
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Applicant Team

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

Name	Current Job Title and Employer	Role in Drafting this Charter School Application
Dr. Linda Campbell	Associate Professor and Director of Master of Arts in Education Program, Union University	Contributor and editor
Dr. Catherine Reinhard	Assistant Professor, Union University	Contributor and editor
Dr. Teresa Tritt	Dean for College of Education, Union University	Contributor and editor
Dr. Rick Taphorn	Vice President for Business Affairs, Union University	Contributor and editor
Dr. Dub Oliver	President, Union University	Contributor and editor
Rob Williams	Assistant Professor of Accounting, Union University	Contributor and editor

Statement of Assurances

As the authorized representative of the sponsor applying to open a charter school in Tennessee, I hereby certify that the information submitted in this application is true to the best of my knowledge and belief, realizing that any misrepresentation could result in disqualification from the application process or revocation after award; and if awarded a charter, the school must comply with all assurances within this section, and all applicable state and federal laws and regulations related to public charter schools. Furthermore, the governing body of the proposed charter school hereby assures that it accepts full legal and financial responsibility for the operation of the school.

I affirm that the public charter school will:

1. Be operated by a not-for-profit organization that is exempt from federal taxation under § 501(c)(3) of the Internal Revenue Code (26 U.S.C. § 501(c)(3));
2. Operate as a public, ~~nonsectarian, non-religious~~ public school, with control of instruction vested in the governing body of the school under the general supervision of the authorizer and in compliance with the charter agreement and the Tennessee Public Charter Schools Act; * (see waiver requests below);
3. Follow all federal, state, and local laws and regulations pertaining to the operation of a public charter school, unless waived according to T.C.A. § 49-13-111(p);

4. Provide special education services for students with disabilities as provided in T.C.A. Title 49, Chapter 10, Part B of the Individuals with Disabilities Education Act, Title II of the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973;
5. Adhere to applicable state and federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964, and the Equal Educational Opportunities Act of 1974;
6. Offer curriculum, textbook, and instructional materials that meet state and federal requirements, including that they are aligned to state academic standards (T.C.A. § 49-6-2202), do not include or promote prohibited concepts (T.C.A. § 49-6-1019), were not created to align exclusively to the Common Core State Standards, and are not marketed as Common Core textbooks or materials (T.C.A. § 49-6-2202);
7. Follow all federal and state laws and constitutional provisions prohibiting discrimination on the basis of disability, race, creed, color, national origin, religion, ancestry, or need for special education services;
8. Follow non-discriminatory admission policies pursuant to T.C.A. § 49-13-107, and processes for conducting an enrollment lottery, if applicable, in alignment with T.C.A. § 49-13-106 & 113 and State Board Rule 0520-14-01-.04;
9. Maintain a school term of no less than two hundred (200) days, including one hundred eighty (180) days for classroom instruction, pursuant to T.C.A. § 49-6-3004;
10. Ensure each instructional day consists of the minimum requirements, pursuant to T.C.A. § 49-6-3004, T.C.A. § 49-6-201, and State Board Rule 0520-01-02-.31(1);
11. Utilize this application as a contract with the authorizer, if no other agreement is signed, pursuant to Tennessee Attorney General Opinion No. 10-45;
12. Exclusively employ teachers who hold an active teaching license and any appropriate endorsement(s) to teach in a public school in Tennessee; * (see waiver requests below);
13. Comply with Open Meetings and Open Records laws (T.C.A. §§ 8-44-101 et seq.; 10-7-503, 504);
14. Not charge tuition, except for students transferring from another district to the school pursuant to the local board's out-of-district enrollment policy and T.C.A. § 49-6-3003;
15. Not charge registration fees or enrollment fees, except as authorized by T.C.A. § 49-13-106;
16. Follow state financial (budgeting and audit) procedures and reporting requirements according to T.C.A. §§ 49-13-111, 120, and 127;
17. Require governing body members, employees, officers, and other authorized persons who receives funds for the charter school, has access to the charter schools' funds, or has authority to make expenditures from the charter schools' funds, to give a surety bond in the form prescribed by T.C.A. § 8-19-101; and
18. Maintain all necessary and appropriate insurance coverage;

19. Notify its authorizer immediately of any change in circumstances that may have a significant impact on the school's ability to fulfill its goals as stated in its charter agreement; and
20. Submit to its authorizer a request to amend its charter agreement for any material modifications as defined by the charter agreement and TN Public Charter Commission rules.

* Union University informed the school board that Union cannot operate as a nonsectarian or nonreligious school (as required by the Tennessee Public Charter Schools Act) because Union is a Christian organization and is committed to providing Christ-centered education. On December 31, 2025, the school board informed Union that its religious character and plan to offer a Christ-centered education does not render it ineligible to participate. Union University will comply with the remaining portions of the Tennessee Public Charter Schools Act. The other requested waivers are identified below.



Signature of Authorized Representative

1-30-2026

Date

Dr. Teresa Tritt

Printed Name of Authorized Representative

Dean for College of Education, Union University

Title of Authorized Representative

Waivers (Optional)

Proposed Waiver Requests		
Identify the statute or State Board rule for which the sponsor plans to submit a waiver.	Describe the statute or rule the sponsor wants to waive.	Explain how the statute or rule inhibits or hinders the sponsor's ability to meet its goals or comply with its mission.
TCA §49-13-111(a)(2)	Requires public charter schools to be nonsectarian and nonreligious in all operations.	Prevents the school from carrying out its Christian mission, integrating faith across curriculum, culture, and daily routines.
TCA §49-13-106(c)	Prohibits religious or nonpublic schools/organizations from establishing a public charter school.	Blocks a Christian nonprofit, ministry, or church-based entity from serving as a sponsor aligned with the school's mission.
TCA §49-6-1005	Allows religion only for academic study; prohibits devotional instruction or religious indoctrination.	Inhibits integration of biblical worldview, Christian curriculum, and devotional practices essential to the school's mission.
TCA §49-6-1026	Bible courses must be taught in a nonsectarian, literary, and historical manner without doctrinal content.	Prohibits teaching Scripture devotionally, offering theology or apologetics, and forming students spiritually according to Christian beliefs.
TCA §49-6-1004	Requires a moment of silence only; prohibits teacher-led prayer or devotional exercises.	Prevents incorporation of daily prayer, worship, and devotions that form the spiritual life of the school community.
TCA §49-6-1026(d)	Prohibits using religious belief as a factor in hiring for Bible courses or other teaching positions.	Stops the school from requiring staff to profess Christian faith, which is essential for carrying out a faith-based mission.
TCA §49-13-111(a)(3)	Mandates full compliance with state academic standards without modification.	Prevents layering Christian worldview standards, biblical integration, or Christian character goals across the curriculum.
TCA § 49-6-1017	Restricts Bible instruction to secular, neutral, literary analysis and prohibits devotional teaching, theological interpretation,	The school's mission requires a holistic biblical curriculum where Scripture shapes moral, spiritual, and intellectual development. Limiting Bible teaching to neutral literary analysis would fundamentally undermine the school's purpose.

	or biblical worldview integration.	
TCA § 49-5-101 et seq.	Teacher licensure requirements may prevent hiring ministers or Christian educators without traditional credentials. Additionally, this law does not authorize charter school sponsors to hire and lease teachers to charter schools.	The school will hire licensed teachers whenever possible, but reserves the right to hire Christian educators without traditional credentials when a licensed applicant is not available.
TCA § 49-6-2206; SBE Rules	Traditional adoption rules limit instructional materials to state-approved lists.	A faith-integrated curriculum is essential to the school's model, shaping both academic content and worldview formation. This flexibility enables selection of materials that reflect Christian values while maintaining rigorous academic alignment.
TCA § 49-13-104(16)	Current statute requires all charter schools to be nonsectarian in programs, admissions, and operations, and prohibits promoting the agenda of any religious denomination or religiously affiliated entity.	The school's core mission is to provide a Christ-centered education that integrates faith and learning in line with the school's Christian and Baptist theology. This waiver allows the school to authentically implement its founding vision and deliver a coherent Christian program.
T.C.A. § 49-13-113	Current law caps employee preference at 10% for the charter school's employees.	We ask that preference is first given to siblings of currently enrolled students, then to children of Union Academy employees, Union University employees, and governing board members, subject to a 25% enrollment cap and lottery requirements. All remaining applicants are admitted through a random general lottery, with a waiting list maintained for the academic year. This waiver ensures that the school can effectively serve the families of our sponsoring institution while maintaining compliance with all other state and federal enrollment laws.

Article I, § 4 (No Preference to Religion)	“No preference shall ever be given by law to any religion.”	This constitutional provision means schools generally cannot enter into formal partnerships with churches/ministries that result in public funding, resources, property, or endorsement being used for religious instruction or worship. This waiver allows the school to authentically implement its founding vision and deliver a coherent Christian program.
Art. XI, § 12 (No public money for religious worship)	“No public money or property shall be appropriated for or applied to the benefit of any religious worship, exercise or instruction	This constitutional provision means schools generally cannot enter into formal partnerships with churches/ministries that result in public funding, resources, property, or endorsement being used for religious instruction or worship. This waiver allows the school to authentically implement its founding vision and deliver a coherent Christian program.
Art. XI, § 8 (Education system free from sectarian control)	The legislature must provide for a public education system free from sectarian control.	This constitutional provision means schools generally cannot enter into formal partnerships with churches/ministries that result in public funding, resources, property, or endorsement being used for religious instruction or worship. This waiver allows the school to authentically implement its founding vision and deliver a coherent Christian program.
TN State Board Attendance Reporting Rule 0520-01-03-.05(h)	This rule requires integration of the charter school’s attendance data into the existing public school student information system.	Mandatory integration would require duplicative reporting, introduce data latency, and reduce system integrity without improving instructional oversight or student accountability. The requested waiver does not seek exemption from attendance tracking, accountability, or reporting obligations—only from the technical requirement of system integration. Student attendance data will remain reliable, auditable, and transparent.
TCA § 49-5-501 et seq.	Establishes tenure system and definitions.	Flexibility to establish and implement our own educator evaluation and personnel management system aligned to the school’s mission, instructional model, and accountability goals is necessary. Employment decisions, including renewal

		and termination, will be based on professional performance, adherence to school policies, and alignment with the school's mission and standards. The school will maintain written evaluation criteria, provide regular performance feedback, and ensure employment practices are conducted in a fair, transparent, and lawful manner consistent with state and federal nondiscrimination requirements.
TCA § 49-5-503	This law defines eligibility requirements for teacher tenure.	Flexibility to establish and implement our own educator evaluation and personnel management system aligned to the school's mission, instructional model, and accountability goals is necessary. Employment decisions, including renewal and termination, will be based on professional performance, adherence to school policies, needs of the school, and alignment with the school's mission and standards. The school will maintain written evaluation criteria, provide regular performance feedback, and ensure employment practices are conducted in a fair, transparent, and lawful manner consistent with state and federal nondiscrimination requirements.
TCA § 49-5-504	This law defines probationary criteria and transition to tenure.	Flexibility to establish and implement our own educator evaluation and personnel management system aligned to the school's mission, instructional model, and accountability goals is necessary. Employment decisions, including renewal and termination, will be based on professional performance, adherence to school policies, needs of the school, and alignment with the school's mission and standards. The school will maintain written evaluation criteria, provide regular performance feedback, and ensure employment practices are conducted in a fair, transparent, and lawful manner consistent with state and federal nondiscrimination requirements.

TCA § 49-5-515	This law defines authority for rules governing the tenure system.	Flexibility to establish and implement our own educator evaluation and personnel management system aligned to the school's mission, instructional model, and accountability goals is necessary. Employment decisions, including renewal and termination, will be based on professional performance, adherence to school policies, needs of the school, and alignment with the school's mission and standards. The school will maintain written evaluation criteria, provide regular performance feedback, and ensure employment practices are conducted in a fair, transparent, and lawful manner consistent with state and federal nondiscrimination requirements.
TCA §§ 49-6-1021(a)–(c)	This requirement outlines that each local education agency must provide specified physical education class time consistent with law and policy.	Union Academy affirms that this waiver request does not diminish the importance of student physical health and wellness. The school's proposed model is designed to support student fitness, movement, and overall well-being through innovative scheduling and instructional practices that meet the intent of Tenn. Code Ann. § 49-6-1021 while allowing flexibility consistent with the autonomy afforded to public charter schools.

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Educational Program Design and Capacity

School Overview

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

Union University will operate and oversee Union Academy through a nonprofit entity. Union University will serve as the sole member of the nonprofit and will retain exclusive authority to appoint members of Union Academy's board of directors. Union Academy's board of directors will consist of four members: Union University's Chairman, Vice Chairman, and Board Secretary, along with one parent representative.

At present, the board positions are held by Jeff Perkins (Chairman), Joshua Dougan (Vice Chairman), and Kay Griffin (Board Secretary). The parent representative will be appointed following the school's establishment. Biographical information for the current board members is attached.

Following charter approval, Union University will support the incorporation of Union Academy as a separate nonprofit entity and the submission of an application for independent 501(c)(3) tax-exempt status. This structure will ensure that Union Academy operates with full legal, financial, and governance independence, while maintaining mission-aligned service partnerships with Union University.

Union Academy will be a Christ-centered, academically rigorous public charter school designed to serve families in Jackson, Tennessee and the surrounding communities who are seeking a high-quality, tuition-free education grounded in Christian values. The school's mission is to provide Christ-centered education that promotes excellence and character development in service to Church and society.

Union Academy will deliver a strong academic program to K-12 students with an emphasis on literacy, mathematics, science, critical thinking, and great texts of the Western tradition interconnected with Biblical worldview. Students will be provided with 1:1, age-appropriate instructional technology devices that supplement classroom instruction and enhance engagement. Technology will support research, collaboration, assessment, and individualized learning while reinforcing—not replacing—high-quality teaching. Instruction will be rigorous, standards-aligned, and designed to challenge students to think deeply, communicate effectively, and apply knowledge across disciplines. Academic success will be measured through student achievement, growth, and college readiness indicators, while equal importance will be placed on character development, servant leadership, and positive contributions to families, the school community, and society.

The school will implement a comprehensive, data-driven assessment system to monitor student learning, guide instruction, and communicate progress to families and stakeholders. Students will participate in state assessments, including TNReady in grades 3–8 and End-of-Course (EOC)

exams in high school, while the school will also administer MAP Growth, i-Ready Diagnostic (grades K–8), and the ACT (grades 10–11) to provide a more complete picture of student achievement and readiness. This multi-faceted approach ensures both alignment with Tennessee Academic Standards and meaningful, actionable data to drive instruction. Through its rigorous academic program, intentional character formation, and strong community partnerships, Union Academy seeks to create a collaborative, mission-aligned school community that supports the whole child. The school will prepare students not only to achieve at high academic levels, but also to lead lives marked by faith, service, and positive impact in their communities.

School Mission and Model

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

The school's mission is to provide Christ-centered education that promotes excellence and character development in service to Church and society.

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

The school will measure its success through a balanced focus on Christ-centered education, academic excellence, and strong character and service. Faith formation will be assessed through annual parent surveys and age-appropriate student self-assessments that reflect on personal growth and alignment with Christian values. Academic achievement will be tracked using student growth percentiles in reading and math, TN Ready assessments, and ACT/SAT readiness for secondary students, with long-term outcomes monitored through high school graduation rates. Character and service will be evaluated through student participation in community service hours, engagement with church and nonprofit partnerships, discipline and behavioral data, and overall attendance. Together, these metrics will provide a comprehensive view of how the school fulfills its mission to develop students who are academically prepared, morally grounded, and actively contributing members of their communities.

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

There are currently no Christ-centered, tuition-free school options available to families in Jackson, Tennessee, or the surrounding communities. This absence exists despite the region's strong Christian identity, the prevalence of faith-based institutions, and a clear interest among families in educational environments that integrate academic excellence with Christian values and character formation.

Jackson and Madison County reflect a deeply rooted Christian heritage. According to *Religion – Jackson Madison County Bicentennial* by Jason Strandquist, Madison County is home to 78 Baptist churches, representing a significant portion of the local religious landscape. Faith-based organizations play a visible and influential role in community life, civic engagement, and service. Union University, a prominent higher education institution in Jackson, is affiliated with the Southern Baptist Convention and further exemplifies the community’s longstanding commitment to Christ-centered education and leadership development.

This local context is reinforced by statewide religious demographics. According to the Pew Research Center (2023–2024), 72% of adults in Tennessee identify as Christian, with approximately 45% identifying as Evangelical Protestant. Tennessee is consistently recognized as one of the most religious states in the nation, with Evangelical Protestants comprising the largest individual religious group. These data indicate that a significant number of Tennessee families value Christian beliefs and desire educational settings that reflect and reinforce those beliefs.

Despite this strong Christian presence, families in Jackson who seek Christ-centered education currently have limited options. For the 2025–2026 school year, there are eight private schools serving approximately 3,241 students in Jackson, Tennessee, and 75% of these schools are religiously affiliated. While these schools demonstrate demand for Christian education, their tuition-based models limit accessibility for many families. As a result, families who desire a Christ-centered educational environment but cannot afford private school tuition are left without a viable public option.

At the same time, Jackson continues to experience sustained enrollment demand in its public schools, particularly at the elementary level in North Jackson. According to the 2024–2025 Tennessee School Report Card, Pope Elementary School serves 628 students in grades K–6 and is expanding to include grades 7 and 8. Thelma Barker Elementary School enrolls an additional 776 students. These enrollment figures reflect population growth and consistent demand for high-quality educational opportunities, further underscoring the need for additional public school options especially in the north side of town.

The absence of a Christian public charter school in Jackson represents a significant gap in the local education landscape. Many families are seeking educational options that not only deliver strong academic outcomes but also intentionally cultivate faith, character, moral responsibility, and service to others. A Christian public charter school would respond directly to this need by expanding educational choice and increasing access to a Christ-centered, academically rigorous education for a diverse population of students grounded in Christian values.

Although Tennessee’s scholarship voucher program provides an option for some families, it does not fully address this need. Because the voucher does not cover the full cost of tuition, private Christian schools remain financially inaccessible for many families. A Christian public charter school would therefore offer an equitable, tuition-free alternative that ensures access to faith-informed education regardless of a family’s financial circumstances.

In addition, the sponsor has engaged meaningfully with local education leaders. Union University was invited by Jackson-Madison County Schools (JMCSS) to explore the opportunity to open a charter school in partnership with the district. This invitation reflects a shared interest in expanding high-quality public school options for students in the Jackson area. The sponsor is a strong supporter of JMCSS schools and views this proposed charter not as a competing entity, but as a collaborative partner committed to strengthening the overall public education ecosystem in the community.

Establishing a Christian public charter school in Jackson, Tennessee would align with demonstrated community interest, address accessibility challenges associated with private education, and meet growing enrollment demand. Most importantly, it would provide families with a tuition-free public option that integrates academic excellence with faith-informed character development—meeting a need that is currently unmet in the region.

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

The school day is structured to balance academic rigor, faith formation, enrichment, and student well-being, with variations across grade bands to meet developmental needs.

For elementary students (K–5), the day begins with a morning devotional or chapel to center students in the school’s Christ-centered mission. Core academic blocks in literacy and mathematics are followed by science and social studies, all integrated with a biblical worldview. Students participate in specials including art, music, physical education, and technology/ STEM. Daily devotionals and small group interventions reinforce both faith and academic growth. Lunch and recess provide opportunities for fellowship and social skill development. The week includes weekly chapel service, with time dedicated monthly to service learning or outreach projects within the community.

Middle school students (grades 6–8) follow a slightly extended day to allow for more elective offerings, study hall, and leadership development. Core subjects—English, mathematics, science, and social studies—are delivered with an emphasis on application-based learning and faith integration. Bible instruction and character formation are incorporated daily, alongside electives such as art, music, PE, technology/ STEM, and foreign language. Students engage in service learning projects and participate in advisory periods focused on goal-setting, academic planning, and mentorship. The school day supports intervention, enrichment, and leadership opportunities while reinforcing the school’s mission.

High school students (grades 9–12) follow a full-day schedule that balances college-preparatory academics with faith-based instruction and enrichment. Core courses include English, mathematics, science, and social studies, with advanced coursework and electives available to support college and career readiness. Daily devotionals strengthen moral development, while advisory periods and study halls provide structured support for academic growth and personal

reflection. Students participate in weekly chapel, and will have service-learning activities throughout the year that foster character and community engagement.

Across all grade levels, the school week is designed to provide a holistic educational experience that develops students intellectually, spiritually, and morally. Daily routines, weekly chapel gatherings, service learning, and reflective practices ensure that students receive rigorous academic instruction, strong faith formation, and meaningful opportunities for personal and character growth. Below is a sample schedule for the school per grade band.

Time	<u>K-5 (Elementary)</u>
8:00 – 8:30	Morning Devotional & Announcements
8:30 – 10:00	CKLA Literacy Block (Reading, Writing, Phonics, Vocabulary)
10:00 – 10:30	Morning Recess / Brain Break/ Snack
10:30 – 11:30	Small Group Instruction/ Interventions/ Tiered Support
11:30 – 12:30	Singapore Math
12:30 – 1:20	Lunch & Supervised Play
1:20 – 2:20	Specials (Art, Music, PE, Technology/STEM)
2:20 – 3:00	Science/ Social St. (alternating days)
3:00 – 3:30	Closing Circle / Prayer & Reflection / Dismissal

Time	<u>6-8 (Middle School)</u>
8:00 – 8:30	Morning Devotional & Announcements
8:30 – 9:30	Electives (Art, Music, PE, Technology/STEM, Foreign Language)
9:30 – 11:00	Singapore Mathematics
11:00 – 11:45	Lunch and Social Time
11:45 - 1:00	English / Language Arts
1:00 - 1:45	Study Hall / Tutoring / Small Group Academic Support
1:45 - 2:45	Science / Social Studies
2:45 - 3:15	Character Development / Leadership Development/ Advisory Groups
3:15 – 3:30	Prayer, Reflection & Dismissal

Time	<u>9-12 (High School)</u>
8:00 – 8:30	Morning Devotional & Announcements
8:30 – 9:30	History (US History, Government, Economics)
9:30 - 10:30	Electives / Advanced Coursework (STEM, Fine Arts, Technology)
10:30 - 11:30	Mathematics (Algebra, Geometry, Pre-Calculus, Statistics)
11:30 - 12:30	Science (Biology, Chemistry, Physics)
12:30 - 1:15	Lunch & Fellowship
1:15 – 2:15	Literature/ ELA
2:15 – 3:15	Advisory / Academic Support / Tutoring/ Study Hall
3:15 – 3:30	Reflection / Prayer / Dismissal

Union Academy affirms that this waiver request does not diminish the importance of student physical health and wellness. The school's proposed model is designed to support student fitness, movement, and overall well-being through innovative scheduling and instructional practices that meet the intent of Tenn. Code Ann. § 49-6-1021 while allowing flexibility consistent with the autonomy afforded to public charter schools.

Anticipated Student Population

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

The anticipated student population for the proposed school is grounded in publicly available demographic and education data for Jackson and Madison County. According to the U.S. Census Bureau, Jackson, Tennessee has an estimated 69,303 residents, with 24.2% of residents under age 18, indicating a substantial base of school-age children in the community. According to the U.S. Census Bureau, the larger Madison County area — which encompasses Jackson and surrounding communities — an estimated 22.3% of the population is under age 18, further demonstrating a significant population of school-age youth.

Local public education enrollment underscores this demand. According to the Tennessee State Report Card, the Jackson-Madison County School System serves over 12,200 students across 26 schools, reflecting active participation in K-12 schooling within the community. These trends provide a factual basis for projecting interest in an additional public schooling option.

Academic needs were projected by reviewing state and local assessment data available through the Tennessee State Report Card, which highlights performance outcomes, growth measures, and areas for targeted support across subject areas. For example, in 2025, 35.1% of Madison County elementary, middle, and high school students were at or approaching expectations on ELA achievement tests compared to 46.8% students statewide. In the area of math, 17.5% of students in elementary, middle, and high scored at or approaching expectations on math achievement tests compared to 30.7% of students statewide.

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

Table 1. Projected Enrollment											
Grade Level	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Full Capacity
K	60	60	60	60	60	60	60	60	60	60	60
1	60	60	60	60	60	60	60	60	60	60	60
2	50	60	60	60	60	60	60	60	60	60	60
3	50	50	60	60	60	60	60	60	60	60	60
4	50	50	50	60	60	60	60	60	60	60	60
5	50	50	50	50	60	60	60	60	60	60	60
6		50	50	50	50	60	60	60	60	60	60
7			50	50	50	50	60	60	60	60	60
8				50	50	50	50	60	60	60	60
9					50	50	50	50	60	60	60
10						50	50	50	50	60	60
11							50	50	50	50	60
12								50	50	50	60
TOTAL	320	380	440	500	560	620	680	740	750	760	780

Sources and Methodology for Enrollment Projections

Union Academy’s enrollment projections were developed using a conservative, capacity-driven methodology designed to align enrollment growth with instructional quality, staffing capacity, facility constraints, and fiscal sustainability. The projections reflect the school’s phased implementation plan, in which the school opens with elementary grades and adds one grade level per year until full K–12 implementation is reached.

Initial Enrollment Assumptions (Year 1):

Year 1 enrollment is based on the school’s planned classroom configuration and instructional model. The school will open serving grades K–5 with:

- Kindergarten: 60 students (three classrooms of approximately 20 students each);

- Grade 1: 60 students (three classrooms of approximately 20 students per class); and
- Grades 2–5: 50 students per grade (two classrooms of approximately 25 students each).

These targets were selected to support developmentally appropriate class sizes, instructional quality, and manageable staffing ratios in the school’s first year of operation.

Phased Growth and Grade-Level Expansion:

Beginning in Year 2, Union Academy will expand by adding one grade level per year. This stacking approach allows the school to grow in a deliberate and sustainable manner, ensuring that staffing, facilities, and student support systems scale appropriately as enrollment increases. The phased approach aligns with recognized best practices in charter school development, which indicate that gradual growth allows schools to refine instructional programs, strengthen school culture, and build operational capacity before scaling to additional grades (U.S. Department of Education, *Starting Strong: Best Practices in Starting a Charter School*, 2022).

Stabilization and Full-Capacity Targets:

While early implementation years reflect smaller cohorts in newly added middle and high school grades, the long-term enrollment model stabilizes at approximately 60 students per grade across kindergarten through grade 12. High school grades are projected to open with approximately 50 students per grade and grow to 60 students per grade as the program matures and demand increases. At full implementation, Union Academy projects a total enrollment of approximately 780 students.

Sources Informing Enrollment Projections:

Enrollment assumptions were informed by:

- The school’s instructional design and classroom capacity;
- Staffing and scheduling models appropriate for elementary, middle, and high school settings;
- Anticipated community demand based on outreach efforts and interest expressed by families;
- Comparable enrollment patterns observed in Tennessee charter schools utilizing phased, cohort-based growth models; and
- Conservative planning assumptions intended to avoid over-enrollment during the school’s start-up and early growth years.

Ongoing Monitoring and Adjustment:

Union Academy will review enrollment data annually and adjust recruitment strategies, staffing levels, and sectioning as needed to ensure alignment with student demand, instructional quality, and financial sustainability. This disciplined approach ensures that enrollment growth supports the school’s mission while maintaining compliance with Tennessee charter school requirements.

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

Table 2. Anticipated Demographics	
Student Population*	Estimated Percent of Total Enrollment at Capacity
Economically Disadvantaged	50%
Students with Disabilities	15%
English Learners	5%
<i>At-Risk (for opportunity public charter schools only)</i>	

Union Academy’s anticipated demographic projections were developed using publicly available state and district-level data and are aligned with Tennessee definitions, reporting practices, and funding methodologies. The projections reflect conservative, planning-level assumptions intended to ensure the school is appropriately staffed, resourced, and fiscally prepared to serve its student population as enrollment phases in.

The estimate that approximately 50% of students will be economically disadvantaged is grounded in Economically Disadvantaged (ED) data used for Basic Education Program (BEP) funding calculations and publicly reported by the Tennessee Department of Education. This estimate is further supported by district-level data from the Jackson-Madison County School System, where a substantial portion of enrolled students qualify as economically disadvantaged. Across Tennessee, economically disadvantaged students consistently comprise approximately 45–55% of total public school enrollment, depending on district and year. Using a 50% estimate reflects a middle-of-the-range, conservative assumption that is appropriate for start-up planning and consistent with current statewide and local trends.

Union Academy also projects that approximately 15% of students will be identified as students with disabilities. This estimate aligns with statewide special education enrollment data published by the Tennessee Department of Education, which consistently indicate that 14–15% of Tennessee public school students receive services under the Individuals with Disabilities Education Act (IDEA). This projection is further supported by national data from the National Center for Education Statistics, which similarly report special education participation rates near 15%. This assumption enables responsible planning for staffing, evaluations, and related services while remaining aligned with typical Tennessee charter and district profiles.

The projection that approximately 5% of students will be identified as English Learners (EL) is based on statewide EL enrollment data reported annually by the Tennessee Department of

Education, which show EL populations generally ranging between 4–6% across the state. This estimate is also informed by local trends within the Jackson-Madison County School System, which reflect a growing but still modest English Learner population relative to larger urban districts. Using a 5% estimate represents a forward-looking yet conservative assumption that supports appropriate instructional planning and compliance without overestimating demand.

Union Academy will review actual enrollment data annually and adjust programming and supports as needed to ensure responsiveness to the needs of its enrolled student population and continued alignment with Tennessee charter school requirements.

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

The school will implement a comprehensive recruitment strategy to engage families and build awareness of its Christ-centered, academically rigorous program. Partnerships with the local school system, local churches, youth ministries, and Christian nonprofits will provide opportunities for information sessions and volunteer engagement. Early supporters and parent ambassadors will help share testimonials and host family nights for prospective families. The school will also host scheduled open houses once the location has been finalized.

A strong digital presence will complement in-person outreach, including a website with virtual tours, curriculum overviews, and application instructions, as well as active social media accounts highlighting student life, faith integration, and academic achievements. Email newsletters and local media campaigns, including press releases and feature stories in Christian publications, will further promote the school.

Union Academy respectfully requests a waiver of the statutory 10% employee preference cap under T.C.A. § 49-13-113 to allow up to twenty-five percent (25%) of enrollment to be reserved for children of employees of Union Academy, Union University, and our governing board. We also request that these students be enrolled automatically, outside the general lottery, provided they meet eligibility requirements. This waiver ensures that the school can effectively serve the families of our sponsoring institution while maintaining compliance with all other state and federal enrollment laws.

To encourage enrollment, the school will implement strategies such as accepting siblings preference for families with multiple children, and transparent lottery procedures if enrollment exceeds capacity, ensuring fairness while communicating clearly with families throughout the process. An organized waitlist and periodic follow-ups with interested families would be utilized.

Enrollment and Admissions Policy

Open Enrollment

Union Academy shall be open to all students eligible to attend public school in Tennessee, subject to capacity limits. Enrollment shall be conducted without discrimination on the basis of race, color, religion, national origin, disability, gender, language proficiency, or prior academic achievement.

Union Academy is designed to serve students in grades K–12 who can thrive in a rigorous academic environment. While the School is committed to supporting students with disabilities, it is not equipped to provide intensive one-to-one support, extensive therapeutic services, or highly specialized interventions. Families of students requiring such supports should carefully consider whether the School can appropriately meet their child’s needs. Students with disabilities who can access the curriculum with standard accommodations are welcome to apply.

Capacity and Lottery

If applications exceed the number of available seats in any grade, Union Academy shall conduct a random, public lottery in accordance with Tennessee law and the approved charter agreement.

Enrollment Preferences

Because Union Academy is sponsored by an institution of higher education, enrollment preference may be afforded to children of the following, subject to the limitations set forth below:

- Employees of Union Academy;
- Employees of Union University; and
- Members of Union Academy’s governing board.

This preference is subject to the following conditions:

- Students admitted under this preference shall not exceed twenty-five percent (25%) of the school’s total enrollment.
- This preference shall be applied prior to the general lottery, and eligible applicants may be enrolled without a lottery until the 25% cap is reached.
- If the number of eligible applicants exceeds available seats within the 25% cap, a random lottery shall be conducted among those applicants.
- For purposes of this preference, “children” may include lineal descendants, as permitted by law and the school’s charter.

General Lottery

All remaining eligible applicants shall be admitted through a random lottery for any remaining seats. A waiting list shall be maintained in lottery order and used to fill vacancies for the applicable academic year.

Multiples (Twins/Triplets)

Multiple-birth siblings applying to the same grade shall be treated as a single lottery entry, to the extent permitted by available seats.

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

The school will grow intentionally by cohort, beginning with an elementary foundation designed to support stable enrollment of approximately 50 students per grade in grades 6–12. The school would maintain an organized waitlist and periodic follow-ups with interested families at the beginning of each semester.

Family and Community Engagement and Support

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

The sponsor has engaged meaningfully with local education leaders. Union University was invited by Jackson-Madison County Schools (JMCSS) to explore the opportunity to open a charter school in partnership with the district. This invitation reflects a shared interest in expanding high-quality public school options for students in the Jackson area. The sponsor is a strong supporter of JMCSS schools and views this proposed charter not as a competing entity, but as a collaborative partner committed to strengthening the overall public education ecosystem in the community.

The sponsor intends to engage families, community organizations, and district partners through surveys, information sessions, and community meetings as the application progresses. Feedback from these efforts will be used to refine the academic program, school culture, and operational plans to ensure the school is well-positioned to meet the needs of students and families in Jackson, Tennessee.

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

Table 3. Evidence of Community Engagement and Support	
Briefly describe each piece of evidence included as part of Attachment 1.	Explain how and why the submitted item is evidence of the sponsor's engagement with the community and the community's support for the school.

	Formal community engagement evidence is limited at this stage of the process. The sponsor’s consideration of this application was initiated at the request of the superintendent, who asked the institution to explore and submit an application prior to conducting broader community outreach. This sequencing reflects responsiveness to district leadership and an effort to ensure that community engagement is purposeful, informed, and aligned with local needs and expectations.
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13. Describe how the school will continue to engage parents and community members once it is open.

The school will foster ongoing engagement with parents and community members through regular communication and surveys, structured involvement opportunities, and strong partnerships. Families will receive frequent updates on student progress and school events through newsletters, digital communications, and ongoing teacher feedback. Parents and caregivers will be encouraged to participate in classroom volunteering, family engagement nights, chapel services, and service-learning projects that strengthen the connection between home, school, and community.

To ensure meaningful stakeholder voice, the school will establish a Parent and Community Advisory Board that will meet regularly with the principal throughout the school year. This advisory board will include parents, community members, and faith- and civic-based partners and will serve as a forum for feedback, dialogue, and collaboration related to school culture, family engagement, and program improvement. While the advisory board will provide valuable input and perspectives, it will have no governance, fiduciary, or decision-making authority, which will remain solely with the school’s governing board and leadership.

The school will also maintain active partnerships with local churches, nonprofit organizations, and civic groups to support service-learning, mentorship, and enrichment opportunities for students. Regular events such as student showcases, award ceremonies, and community service celebrations will bring families and community members together to celebrate academic achievement, character development, and spiritual growth. Through these strategies, the school will cultivate a collaborative, mission-aligned community that actively supports students’ academic, spiritual, and personal development.

School Culture and Discipline

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

A highly effective school cultivates a culture of high expectations, mutual respect, and continuous growth. Students are engaged in rigorous, student-centered learning while receiving the support

and guidance needed to succeed academically and socially. Strong relationships, collaboration among educators, and a focus on character development create a safe, inclusive, and motivating environment. This ethos reinforces the school's mission by preparing students to excel, build resilience, and develop a lifelong love of learning.

Our school cultivates a Christ-centered culture of high expectations, respect, and growth, where students are engaged in rigorous, student-centered learning grounded in biblical values. Teachers collaborate to provide individualized support, while strong relationships and a focus on character and faith development create a safe, inclusive, and nurturing environment. By celebrating academic achievement, spiritual growth, and personal development, this culture reinforces our mission, equipping every student to thrive academically, socially, and spiritually as they live out their God-given potential.

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

The school will cultivate a mission-driven, Christ-centered culture where academic excellence, character development, and faith are inseparable priorities. Core values and the school's mission will be clearly communicated to staff, students, and families and embedded in all policies, procedures, and daily practices.

Staff will be recruited and developed to embody the school's values, model high expectations, and foster strong relationships with students. Clear academic, behavioral, and social-emotional expectations will be established, taught, and reinforced consistently, with positive recognition for student and staff growth. Families will be engaged as active partners through orientation, regular communication, and opportunities to support character formation and faith integration at home.

Relationship-building will be prioritized among students, staff, and families through advisory programs, mentorship, and small-group activities, promoting empathy, collaboration, and service to others. Success and growth—both academic and personal—will be celebrated publicly in ways that align with the school's mission. Continuous feedback and data will guide refinement of instruction, discipline, and community-building strategies, ensuring a culture of reflection, improvement, and mission-aligned excellence.

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

The school will maintain a proactive, multi-tiered approach to promoting regular student attendance, with the goal of achieving a 95% attendance rate. Teachers, school social workers, and administrators will work collaboratively to monitor attendance data, identify patterns of chronic absenteeism, and implement timely interventions.

Teachers will serve as the first line of monitoring by taking daily attendance, documenting patterns of tardiness or absence, and communicating promptly with families regarding concerns. They will also foster a classroom culture that values consistent attendance through positive reinforcement, engagement strategies, and clear expectations.

School social workers will support students who demonstrate chronic absenteeism by attempting to identify underlying causes, which may include academic challenges, health concerns, transportation barriers, or family circumstances. They will collaborate with families to develop personalized attendance plans, provide counseling services as needed, and connect students to community resources that remove barriers to consistent attendance.

Administrators will oversee the school-wide attendance monitoring system, reviewing attendance reports regularly to identify trends at both the classroom and grade levels. They will coordinate interventions with teachers and social workers, set attendance goals, and communicate progress to families and the school community. Administrators will also establish policies for early notification, incentives for consistent attendance, and, when appropriate, supportive consequences for repeated absences.

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

Union Academy's discipline approach is rooted in the School's mission to cultivate students who grow intellectually, morally, and spiritually. We believe a structured, positive, and consistent environment is essential for academic success, character development, and self-discipline. Our approach emphasizes restorative practices, accountability, and personal responsibility, reflecting Union Academy's commitment to Christ-centered character development.

Union Academy anticipates a diverse student population with varying academic and social-emotional needs. This discipline approach:

- Provides clear expectations and structure for a safe, focused learning environment
- Uses restorative interventions to reduce repeated misbehavior
- Promotes personal responsibility, moral development, and decision-making skills
- Balances rigorous academic expectations with social-emotional support, ensuring all students have the opportunity to thrive

Framework and Practices

A. Positive Behavioral Expectations

- Students are taught clear behavioral expectations aligned with biblical core values.
- Expectations are explicitly communicated, reinforced in classrooms, and modeled by faculty and staff.

B. Preventive and Supportive Measures

- Staff use positive reinforcement, social-emotional learning lessons, and mentoring to encourage desirable behavior.
- Classroom management strategies include structured and consistent routines, clear instructions and expectations, and proactive interventions to minimize disruptions.

C. Restorative and Corrective Actions

- Restorative practices, including mediated discussions, reflection exercises, and goal-setting conferences, are employed to address behavioral challenges.
- Logical consequences are used to promote accountability while maintaining student dignity.
- Escalating interventions may include temporary removal from class or out-of-school suspension, consistent with Tennessee law.

D. Dismissal for Severe Behavioral Issues

While Union Academy emphasizes restorative practices, the School may dismiss a student for severe or repeated behavioral infractions if the behavior poses a serious and ongoing risk to the safety, well-being, or learning of themselves or others. Examples include:

- Acts of violence or threats against staff or students
- Repeated, serious disruptive behavior preventing access to the educational program
- Noncompliance with behavioral intervention plans after documented support attempts

Prior to dismissal, Union Academy ensures due process under Tennessee law, including written notification to parents/guardians, documentation of prior interventions, and a meeting with school leadership to discuss alternatives. For students with disabilities, all dismissals comply with IDEA and Section 504 protections, including manifestations determinations and accommodations.

E. Special Populations Considerations

- Students with disabilities receive behavioral supports and accommodations aligned with their IEP or 504 plan.
- Union Academy collaborates with families and specialists to implement behavior intervention plans for students requiring additional support.

Through this framework, Union Academy maintains a school culture where students learn from mistakes, grow in character, and develop the skills necessary for both academic and personal success.

Curriculum and Instruction

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

Union Academy provides a rigorous, Christ-centered K–12 academic program designed to develop students intellectually, morally, and spiritually. The School's curriculum emphasizes literacy, mathematics, science, and critical thinking while integrating biblical principles and character education to foster ethical decision-making and personal responsibility.

Instruction is guided by a set of non-negotiables. All students participate in a research-based, standards-aligned curriculum with differentiated instruction and application-based learning. Students are taught by teachers and staff who provide mentorship, monitor progress, and support social-emotional growth. Union Academy employs explicit instruction, small group support, and ongoing formative assessments to ensure students access grade-level content and achieve measurable growth.

Union Academy maintains a full-length school day that allows for academic enrichment, targeted interventions, technology/STEM, arts integration, and service-learning opportunities. Character and faith are embedded in daily instruction, advisory periods, and school-wide activities to cultivate integrity, perseverance, respect, and service.

This academic plan meets the needs of a diverse student population by providing structured support for students at varying readiness levels while maintaining high expectations. Through this approach, students will achieve proficiency in core subjects, develop critical thinking and communication skills, and demonstrate moral and social responsibility. The program prepares students to succeed academically, spiritually, and socially which fully aligns with Union Academy's mission of producing well-rounded, Christ-centered learners.

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

The school will provide a classroom-based, structured learning environment that balances rigorous academics, faith integration, and character development. Students will typically learn in age-appropriate class sizes, ranging from 20–25 students in K-3 elementary classrooms and 25-30 students in middle and high school classrooms. Classes will be staffed with an instructional assistant at assigned times during the day to help the teacher. This structure allows teachers to provide individualized attention, differentiated instruction, and meaningful feedback while fostering strong relationships between students and staff.

Starting in grade 2, students will be provided with 1:1, age-appropriate instructional technology devices that supplement classroom instruction and enhance engagement. Technology will

support research, collaboration, assessment, and individualized learning while reinforcing—not replacing—high-quality teaching.

Classrooms will be organized to encourage collaboration, active engagement, and hands-on learning, with flexible seating arrangements and access to technology to support a variety of instructional methods. Teachers will integrate Christian worldview principles into all subjects, creating opportunities for students to explore how faith, ethics, and knowledge intersect in daily learning. In addition to core academics, students will participate in small group instruction, enrichment activities, and service-learning projects, reinforcing both intellectual growth and character formation.

This learning environment supports the school’s mission by ensuring that every student receives a rigorous academic foundation while developing moral integrity, leadership skills, and a strong sense of community. Structured routines and personalized support are designed to meet the needs of the anticipated student population, promote high achievement on state assessments, and cultivate graduates who are spiritually grounded, academically prepared, and equipped to serve their communities.

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

The school will implement a research-based instructional approach grounded in mastery learning, explicit instruction, and frequent spiral review to ensure all students achieve deep understanding of grade-level standards. This model is intentionally designed to meet the needs of a diverse student population with varied academic entry points while maintaining high expectations for academic achievement and character development.

Instruction will be organized around clearly defined, standards-aligned learning objectives. Teachers will ensure students demonstrate mastery of essential skills and concepts before progressing to new content. When students do not initially demonstrate mastery, teachers will provide targeted re-teaching, additional practice, and alternative instructional approaches. This mastery-based framework allows students the time and support needed to succeed while preventing the accumulation of learning gaps.

Teachers will employ explicit and systematic instructional strategies, particularly in literacy and mathematics, by clearly modeling new skills, breaking complex concepts into sequenced steps, and providing guided practice prior to independent application. Instructional routines will be consistent and predictable, supporting students who benefit from structured learning environments and reducing barriers for students who enter below grade level.

To promote long-term retention and prevent skill regression, teachers will intentionally embed frequent spiral review into daily instruction. Previously taught skills and concepts will be revisited through lesson warm-ups, cumulative practice, and formative assessments. Spiral

review will reinforce foundational knowledge while strengthening mastery over time, ensuring students retain critical skills as content becomes increasingly complex.

Instruction will be delivered using a rigorous, standards-aligned, and knowledge-rich curriculum that builds cumulative understanding across content areas. Lessons will intentionally connect prior learning to new material, supporting comprehension and academic vocabulary development for students from diverse backgrounds. Active learning strategies, including structured academic discussions, guided questioning, and collaborative problem-solving, will engage students in meaningful learning experiences while fostering communication skills and critical thinking.

Ongoing formative assessment will serve as a central component of instructional decision-making. Teachers will use frequent checks for understanding, exit tickets, and short-cycle assessments to monitor student progress toward mastery. Assessment data will inform instructional pacing, spiral review priorities, re-teaching plans, and enrichment opportunities.

General education teachers will be supported by clear systems for differentiated instruction within the mastery learning framework. Teachers will use flexible grouping and targeted small-group instruction to address specific skill needs, reinforce spiral review concepts, and provide enrichment for students who demonstrate early mastery. Tiered instructional tasks will allow all students to work toward the same learning goals while receiving varying levels of support or challenge.

Instructional scaffolds such as visual supports, graphic organizers, sentence frames, and modeled examples will be used to ensure access to grade-level content for all learners. These supports will be intentionally faded as students demonstrate mastery and independence. Teachers will collaborate regularly with interventionists, special education staff, and instructional leaders to align instruction, accommodations, and interventions for students with identified needs.

Teachers will engage in regular data review cycles to analyze student performance and mastery trends. Progress monitoring will be used to identify students requiring additional instructional support and to ensure interventions are timely and effective. Ongoing professional development and instructional coaching will focus on mastery-based instruction, spiral review practices, formative assessment, and differentiation strategies to ensure consistent implementation across classrooms.

Together, these instructional strategies create a coherent, mastery-focused instructional system that supports academic rigor, promotes long-term learning, and ensures all students are challenged and supported to reach their full potential while growing intellectually, socially, and morally.

21. Identify the curriculum the school will offer in alignment with T.C.A. § 49-6-2206 and explain the process for selecting these materials, including a description of why these materials are appropriate for the anticipated student population. If the sponsor plans to apply for a waiver to use textbooks and materials that have not been approved by the State Board, identify the high-quality instructional materials the sponsor plans to use and describe the

research demonstrating that they will meet the academic needs of students. *Note that all anticipated waiver requests should be included in the [Waivers section](#) of this application.*

Union Academy provides a rigorous, knowledge-rich curriculum that meets diverse student needs and integrates Christ-centered education with Tennessee standards. The school's curriculum is intentionally selected to support both foundational literacy and deep content knowledge, ensuring that students build strong reading, writing, and critical thinking skills across all grade levels. The table below summarizes the curriculum for grades K-12.

Grade Level	ELA / Literacy Curriculum	Math Curriculum	Science Curriculum	Social Studies Curriculum
K-2	CKLA (Core Knowledge Language Arts) – foundational reading, vocabulary, comprehension, and knowledge-building	Singapore Math – conceptual understanding, problem solving, number sense, and foundational operations	Inspire Science (5E)	Foundational social studies modules (community, geography, civics)
3-5	CKLA / Wit & Wisdom – literacy and content-rich ELA instruction	Singapore Math – place value, fractions, geometry, word problems, multi-step reasoning	Inspire Science	Gallopade / standards-aligned modules
6	Wit & Wisdom – literature-rich reading comprehension and writing; Aesop's Fables; selected poetry from Longfellow and Dickinson; The Lion the Witch, and the Wardrobe by C.S. Lewis	Singapore Math / Math in Focus – pre-algebra, ratio & proportion, early algebraic reasoning, problem solving	STEMscopes Science (5E + IA)	Gallopade / standards-aligned modules

7	Wit & Wisdom – literature-rich reading comprehension and writing; Little Women by Louisa May Alcott; Anne of Green Gables by L.M. Montgomery; Selected Greek myths / The Odyssey (adapted)	Singapore Math / Math in Focus – pre-algebra, ratio & proportion, early algebraic reasoning, problem solving	STEMscopes Science (5E + IA)	Gallopade / standards-aligned modules
8	Wit & Wisdom – literature-rich reading comprehension and writing; The Odyssey (full or adapted); Shakespeare selections (simplified scenes); The Screwtape Letters by C.S. Lewis (selections for introductory exposure)	Singapore Math / Math in Focus – pre-algebra, ratio & proportion, early algebraic reasoning, problem solving	STEMscopes Science (5E + IA)	Gallopade / standards-aligned modules
9	Wit & Wisdom or aligned literature sequences – high school ELA & literacy skills; Beowulf; Everyman; Shakespeare: Romeo and Juliet; Macbeth	High school mathematics sequence (Algebra I & II, Geometry, Pre-Calculus, Calculus) using Singapore Math approach and problem-solving emphasis	Biology	World History/ World Cultures
10	Wit & Wisdom or aligned literature sequences – high school ELA & literacy skills; The Iliad or The Odyssey (full text); Paradise Lost (selections); Gulliver's Travels by Jonathan Swift	High school mathematics sequence (Algebra I & II, Geometry, Pre-Calculus, Calculus) using Singapore Math approach and problem-solving emphasis	Chemistry	US History I

11	Wit & Wisdom or aligned literature sequences – high school ELA & literacy skills; <i>Pride and Prejudice</i> by Jane Austen; <i>To Kill a Mockingbird</i> by Harper Lee	High school mathematics sequence (Algebra I & II, Geometry, Pre-Calculus, Calculus) using Singapore Math approach and problem-solving emphasis	Physics	US History II
12	Wit & Wisdom or aligned literature sequences – high school ELA & literacy skills; <i>The Great Gatsby</i> by F. Scott Fitzgerald; <i>The Screwtape Letters</i> by C.S. Lewis (selections for advanced analysis)	High school mathematics sequence (Algebra I & II, Geometry, Pre-Calculus, Calculus) using Singapore Math approach and problem-solving emphasis	Environmental Science or Advanced Science Electives	Government/ Civics & Economics

Literacy

For students in grades K–5, the school will implement Amplify CKLA (Core Knowledge Language Arts). CKLA is a research-based, knowledge-building curriculum that integrates phonics and decoding instruction with rich content in history, science, and social studies. The curriculum is explicitly aligned with the Science of Reading, providing systematic instruction in phonological awareness, phonics, fluency, vocabulary, and language comprehension. Research demonstrates that CKLA’s approach improves early literacy outcomes, particularly for students in high-need or urban settings, by combining explicit skills instruction with domain-specific content knowledge that supports comprehension and long-term academic success. CKLA’s structured lessons and spiral review ensure mastery of foundational skills, while its listening and knowledge-building components foster vocabulary acquisition and critical thinking.

For students in grades 6–8, the school will implement Wit & Wisdom, a content-rich literacy curriculum designed to develop advanced reading comprehension, vocabulary, and text-based writing skills. Wit & Wisdom emphasizes engagement with complex texts and text-dependent analysis, ensuring that students learn to read closely, think critically, and write with evidence. The curriculum builds students’ background knowledge and deepens their understanding of language, preparing them for high school-level literacy and success on assessments aligned to state standards. Research and practice in high-performing charter schools demonstrate that Wit & Wisdom supports strong literacy growth by combining knowledge-rich content with structured literacy instruction that develops analytical reading and evidence-based writing skills.

In 6th grade, students engage with foundational literature and texts that introduce Western literary traditions, including selections from Aesop’s Fables, Longfellow and Dickinson poetry, Greek myths, and *The Lion, the Witch, and the Wardrobe* by C.S. Lewis. Instruction emphasizes plot, character, theme, and narrative structure, alongside vocabulary development and comprehension strategies. Students begin writing analytical paragraphs and short essays, building skills in evidence-based reasoning and literary discussion.

In 7th grade, students expand their study to historical and cultural literature, such as *Little Women* by Louisa May Alcott, *Anne of Green Gables* by L.M. Montgomery, and adapted selections from *The Odyssey*. Students analyze character development, ethical and moral decision-making, and cultural contexts, while continuing to strengthen comprehension and analytical writing skills. Instruction emphasizes paragraph- and essay-level writing, literary discussion, and textual evidence integration.

In 8th grade, students engage with more complex texts and allegorical literature, including Shakespearean scenes (adapted) and selections from *The Screwtape Letters* by C.S. Lewis. Focus is placed on literary devices, theme analysis, critical discussion, and moral reflection. Writing instruction emphasizes analytical essays, thematic exploration, and research-based assignments, preparing students for high school ELA rigor. Students continue to refine close reading strategies, vocabulary development, and textual analysis, ensuring readiness for high school coursework.

At the high school level (grades 9–12), Union Academy provides a rigorous, knowledge-rich ELA curriculum designed to develop students’ reading comprehension, literary analysis, writing, and critical thinking skills, preparing them for TNReady, ACT, and college-level literacy expectations. The curriculum is sequenced to progressively build analytical abilities and cultural literacy through engagement with Western literary texts, contemporary works, and informational texts.

In 9th grade, students focus on foundational literary analysis and narrative skills. Core texts include works from classical and medieval literature, such as *Beowulf*, selected Shakespearean plays (*Romeo and Juliet*, *Macbeth*), and age-appropriate historical texts. Instruction emphasizes plot, character, theme, and literary devices, along with writing assignments that cultivate analytical and argumentative skills. Students also develop close reading strategies, vocabulary, and comprehension skills needed for success in later courses.

In 10th grade, students expand their study to early modern and Enlightenment literature, including works such as *The Odyssey*, *Paradise Lost* (selections), and *Gulliver’s Travels*. Students engage in comparative analysis, tracing themes, motifs, and historical contexts across texts. Writing instruction emphasizes expository and analytical essays, evidence-based argumentation, and development of coherent literary critiques. Students refine research skills and continue building college-ready reading comprehension and analytical abilities.

In 11th grade, students study 19th- and 20th-century literature, including novels such as *Pride and Prejudice* and *To Kill a Mockingbird*. Instruction integrates literary analysis, historical

context, and moral/ethical reflection, allowing students to examine human nature, societal structures, and cultural influences. Writing assignments focus on argumentative essays, literary critiques, and research projects, developing students' abilities to communicate complex ideas clearly and persuasively.

In 12th grade, students engage with advanced literature and philosophical texts, including *The Great Gatsby*, *The Screwtape Letters*, and selected essays in philosophy, ethics, and history of ideas. Emphasis is placed on sophisticated literary analysis, synthesis of ideas, and critical reflection, preparing students for college-level discussion, writing, and standardized assessments. Students also produce research-based writing, literary analysis essays, and reflective compositions that integrate textual evidence, analytical reasoning, and moral/ethical consideration.

Mathematics

For mathematics, Union Academy will implement Primary Mathematics U.S. Edition (Singapore Math) for students in grades K–8. Singapore Math emphasizes deep conceptual understanding, problem-solving, and the development of mathematical reasoning skills. Instruction is structured using the Concrete → Pictorial → Abstract (CPA) progression, ensuring students develop a strong foundation before moving to abstract problem-solving. Research indicates that Singapore Math improves student outcomes in number sense, computation, and problem-solving, with gains most pronounced for students in high-need populations. The curriculum's focus on visual models, bar modeling, and structured problem-solving equips students with critical thinking and analytical reasoning skills necessary for higher-level mathematics. Singapore Math is systematically aligned to Tennessee academic standards and provides comprehensive coverage of grade-level expectations, including number operations, fractions, ratios, geometry, and algebraic thinking.

The selection of CKLA, Wit & Wisdom, and Singapore Math was guided by a careful review of research, alignment to state standards, and consideration of the anticipated student population, including students from diverse backgrounds who may enter with varying levels of literacy and mathematical proficiency. Each of these curricula is recognized for its effectiveness in high-performing charter schools and has been shown to accelerate student achievement while supporting equity through structured, coherent instruction.

In cases where the school seeks a waiver to use instructional materials not formally approved by the State Board, CKLA, Wit & Wisdom, and Singapore Math represent high-quality, research-based alternatives to traditional textbooks. The evidence base supporting these curricula includes peer-reviewed research, large-scale efficacy studies, and documented success in schools serving similar student populations, demonstrating that they will meet the academic needs of all students at Union Academy. These curricula collectively provide a comprehensive, standards-aligned, and research-supported foundation for literacy and mathematics, ensuring that students acquire the knowledge, skills, and habits necessary for lifelong learning and success.

Science

From Kindergarten through grade 2, students engage with Inspire Science (5E), exploring foundational concepts in life, physical, and earth sciences through hands-on experiments and observation. This early exposure fosters curiosity, builds scientific vocabulary, and develops foundational investigative skills. In grades 3–5, Inspire Science continues to deepen conceptual understanding and introduces students to the scientific method, encouraging them to explain and elaborate on their findings. Instruction includes interactive labs and performance tasks that cultivate problem-solving skills and analytical thinking.

Middle school students (grades 6–8) transition to STEMscopes Science (5E + IA), which emphasizes inquiry-based learning, data analysis, and application of scientific principles. The curriculum integrates Intervention and Acceleration (IA) to meet the needs of all learners, ensuring students who struggle receive support while advanced learners are challenged.

At the high school level (grades 9–12), Union Academy provides a comprehensive science curriculum designed to develop scientific literacy, critical thinking, problem-solving, and laboratory skills, preparing students for End-of-Course exams, ACT science content, and college-level expectations.

In 9th grade, students typically begin with Biology, which introduces fundamental concepts in cellular biology, genetics, ecology, and organismal systems. Instruction emphasizes inquiry-based learning, hands-on laboratory experiments, and scientific investigation, encouraging students to observe, analyze, and draw evidence-based conclusions. This course builds a strong foundation for subsequent scientific study and helps students develop critical thinking and analytical skills.

In 10th grade, students advance to Chemistry, which focuses on atomic structure, chemical reactions, stoichiometry, and the properties of matter. Laboratory work is a central component, allowing students to apply theoretical concepts to real-world experiments. Emphasis is placed on quantitative reasoning, problem-solving, and scientific communication, preparing students for standardized assessments and future STEM coursework.

In 11th grade, students take Physics, which explores mechanics, energy, waves, electricity, and magnetism. Instruction combines conceptual understanding with mathematical modeling, experimentation, and analytical reasoning. Physics challenges students to apply previously learned science concepts to more complex systems and develop a deeper understanding of the natural world.

In 12th grade, students may select from Environmental Science or Advanced Science electives, such as Anatomy & Physiology, AP Biology, or AP Chemistry, depending on their interests and academic goals. These courses continue to emphasize inquiry, research, lab-based investigation, and application of scientific principles to real-world problems. Students refine their ability to analyze data, construct evidence-based arguments, and communicate scientific findings effectively.

This four-year sequence ensures that students graduate with strong scientific reasoning, hands-on laboratory experience, and mastery of key disciplinary concepts, equipping them to excel in college, careers, and lifelong learning. The curriculum is intentionally rigorous, standards-aligned, and inquiry-driven, fostering curiosity, problem-solving, and the analytical skills necessary for success in both academic and real-world contexts.

Throughout all grade levels, the science curriculum is intentionally hands-on, inquiry-driven, and aligned to Tennessee Academic Standards, helping students develop confidence in problem-solving, observation, experimentation, and analytical reasoning. By engaging actively with content, students not only master scientific concepts but also cultivate curiosity and lifelong learning skills that extend beyond the classroom.

Social Studies

Union Academy's social studies curriculum is designed to build historical knowledge, civic understanding, and critical thinking skills from Kindergarten through grade 12. In the early grades (K–2), students explore foundational concepts such as community, geography, and civics, helping them develop social awareness and an understanding of the world around them. In grades 3–5, students engage with standards-aligned curricula such as Gallopade, integrating U.S. history, geography, and civics while reinforcing literacy skills and reading comprehension. Students learn to analyze information, recognize cause-and-effect relationships, and connect historical events to contemporary society.

Middle school students (grades 6–8) study world and U.S. history through Gallopade, engaging with primary and secondary sources, performing research, and participating in discussion and debate. Instruction emphasizes analytical thinking, evidence-based reasoning, and inquiry skills that prepare students for high school coursework.

At the high school level (grades 9–12), Union Academy provides a carefully sequenced social studies curriculum that develops students' research, writing, and critical thinking skills while ensuring alignment with Tennessee Academic Standards, End-of-Course exams, ACT assessments, and college readiness expectations.

In 9th grade, students begin with World History / World Cultures, a survey of global civilizations, geography, culture, and major historical events. This course emphasizes chronological understanding, historical reasoning, and the analysis of primary and secondary sources, preparing students for more advanced historical thinking in subsequent grades.

In 10th grade, students advance to U.S. History I, covering the Colonial Era through Reconstruction and Industrialization. This course focuses on the foundations of U.S. government, society, economy, and culture. Students learn to identify cause-and-effect relationships in history, analyze primary sources, and develop written historical arguments, building skills essential for both state assessments and academic writing.

In 11th grade, students take U.S. History II, which spans the Progressive Era through contemporary history. Instruction emphasizes modern U.S. history, civic development, and economic change, with a continued focus on critical thinking, source analysis, and essay writing. This course prepares students for End-of-Course U.S. History exams and strengthens their ability to engage in analytical discussion and written expression.

Finally, in 12th grade, students complete Government / Civics & Economics, which provides a foundation in American government, political institutions, and civic responsibility, alongside essential economic principles. This course develops students' understanding of civic engagement and prepares them for college readiness and ACT social studies content. Optional electives such as philosophy, sociology, or advanced history may further enrich students' learning experience.

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

Union Academy is committed to providing high-quality foundational literacy instruction for all students in grades K–5 in accordance with T.C.A. § 49-1-905. The school's approach is grounded in the Science of Reading, which emphasizes the systematic development of phonological awareness, phonics, decoding, fluency, vocabulary, language comprehension, and writing.

In grades K–2, foundational literacy instruction is delivered through Amplify CKLA (Core Knowledge Language Arts). CKLA provides explicit, systematic phonics instruction, including letter-sound correspondence, blending, segmenting, and decoding strategies, ensuring that students master the essential skills for reading fluency. Daily lessons include guided practice with decodable texts, oral language exercises, and phonological awareness activities that support students at all skill levels. The curriculum also incorporates vocabulary development and listening comprehension through content-rich stories in history, science, and social studies, building the background knowledge necessary for strong reading comprehension.

In grades 3–5, CKLA continues to support literacy growth by reinforcing decoding skills as needed while expanding instruction in fluency, vocabulary, and comprehension strategies. Students engage with increasingly complex texts, develop text-based writing skills, and apply comprehension strategies across informational and literary domains. Targeted small-group instruction and differentiated supports are provided for students who need additional intervention in foundational skills.

Assessment is embedded throughout the literacy program, including curriculum-based checks and progress monitoring through tools such as i-Ready Reading and MAP Growth, allowing teachers to identify students who need additional support and to adjust instruction accordingly.

Through this structured, research-based approach, Union Academy ensures that all students in grades K–5 receive the systematic, explicit, and comprehensive foundational literacy instruction

required by T.C.A. § 49-1-905, setting the stage for long-term academic success in reading and across the content areas.

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

Union Academy is committed to ensuring that all high school students are fully prepared for college, careers, and life beyond graduation. The school's program integrates rigorous academics with structured opportunities for post-secondary exposure, work-based learning, and skill development aligned to college and career readiness indicators.

Advanced Coursework and Dual Enrollment

Students in grades 9–12 will have dual enrollment opportunities in partnership with Union University. These courses allow students to earn college credit while still in high school, providing a head start on post-secondary education and fostering college-level academic skills.

Work-Based Learning

The school will offer work-based learning opportunities aligned with student interests and regional workforce needs. These experiences may include internships, mentorship programs, job shadowing, and project-based learning connected to real-world applications. Partnerships with local businesses and community organizations will provide students with exposure to professional environments and the development of essential employability skills.

College Readiness Assessments

Union Academy will provide structured preparation for state and national college readiness assessments, including the ACT and SAT, as part of a comprehensive plan to ensure all students graduate with benchmark readiness scores. Practice testing, targeted skill development, and test-taking strategies will be embedded in the curriculum to maximize student outcomes.

Post-Secondary Planning and Counseling

Students will receive college and career counseling beginning in 9th grade, including support for college applications, scholarship opportunities, financial aid, and career exploration. Advisory appointments, individualized academic planning, and regular progress monitoring will help students make informed decisions about their post-secondary paths.

Experiential Learning and Leadership Opportunities

In addition to academic preparation, the school will provide leadership development, community service, and enrichment programs that foster collaboration, critical thinking, and civic responsibility. These opportunities build the social, emotional, and professional skills essential for success in college and the workforce.

Through this multi-faceted approach, Union Academy ensures that students in grades 9–12 are not only meeting academic standards but also acquiring the knowledge, skills, and experiences necessary to thrive in college, careers, and life beyond high school.

Special Populations

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

The proposed school is designed to serve students in grades K–12 with a range of learning needs, including students with mild to moderate disabilities, English Learner (EL) students, and students identified as gifted, who can successfully access the general education curriculum with appropriate supports and accommodations. The school is committed to providing all eligible students with a free appropriate public education (FAPE) in the least restrictive environment and will fully comply with the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act, and all applicable state and federal requirements.

To ensure adequate staffing, the school plans to provide services for students with disabilities and EL students primarily through internal staffing models. During the hiring process, the school will intentionally recruit and prioritize classroom teachers who hold appropriate endorsements or certifications in special education, English as a Second Language (ESL), or gifted education. These educators will support students through inclusive practices such as co-teaching, differentiated instruction, and targeted interventions within the general education setting. Teachers who assume additional responsibilities related to case management, service coordination, or specialized instructional support will receive stipends to compensate for these added duties.

In addition to endorsed classroom teachers, Union Academy will utilize licensed professionals through Union University, including school psychologists and related service providers, as needed to support evaluation, compliance, and specialized service delivery. These services will be provided through contracted arrangements and will supplement internal staffing to ensure the school meets all legal requirements and student needs. Staffing levels and contracted services will be reviewed annually and adjusted based on enrollment, identified student needs, and legally required service ratios to ensure appropriate coverage and instructional quality.

Due to staffing ratios, available resources, and the school's instructional model, the school may not be able to safely or effectively serve students with severe cognitive disabilities or students who require intensive one-on-one support or extensive therapeutic services. This limitation is not a categorical exclusion based on disability but reflects the school's capacity to provide appropriate, high-quality instruction within its program design. In such cases, the school will collaborate with the local school district to support families in identifying educational placements that can appropriately meet students' individual needs.

The school will maintain an equitable, lottery-based enrollment process for all eligible students and will continuously monitor staffing capacity to ensure alignment with student needs. This approach allows the school to remain mission-aligned while providing meaningful access to instruction, appropriate supports, and high-quality educational opportunities for all students it is equipped to serve.

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

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

The school is committed to providing students with disabilities a free appropriate public education (FAPE) in the least restrictive environment, in compliance with the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act, and all applicable state and federal regulations. The school will implement structured, data-driven systems to accurately identify students with disabilities, deliver a continuum of services, and monitor progress to ensure each student achieves the goals outlined in their Individualized Education Program (IEP) or 504 Plan.

Identification of Students with Disabilities and Avoidance of Misidentification

The school will use a multi-tiered system of support to identify and address students' academic, behavioral, and social-emotional needs prior to referral for special education evaluation. Universal screening assessments will be administered to all students to identify potential areas of concern. Students demonstrating academic or behavioral challenges will first receive evidence-based interventions within the general education setting, accompanied by progress monitoring to assess responsiveness.

Referrals for special education evaluation will be based on multiple data sources, including screening results, progress monitoring data, classroom performance, teacher observations, and parent input. This approach ensures that students are not misidentified due to factors such as limited prior instruction, language differences, or temporary learning gaps. Formal evaluations will be conducted in accordance with IDEA timelines and procedures, using nondiscriminatory assessment tools and a multidisciplinary team process. Parents will be engaged as partners throughout the identification and evaluation process.

Continuum of Services and Instructional Supports

The school will provide a full continuum of special education services designed to meet the needs of students with mild to moderate support needs while maximizing access to the general education curriculum. The majority of students with disabilities are expected to receive services in inclusive general education settings through co-teaching, consultation, or push-in support models.

Students with mild to moderate needs may receive targeted services through resource support, small-group instruction, or specialized interventions aligned to their IEP goals. Placement decisions will be individualized and reviewed regularly to ensure alignment with LRE requirements.

Special education instruction will be aligned to Tennessee academic standards and delivered using research-based instructional practices, including explicit instruction, mastery-based learning, frequent spiral review, and structured interventions. Accommodations and modifications will be implemented as outlined in each student's IEP or 504 Plan to ensure access to grade-level content. Required service minutes will be documented, scheduled, and monitored to ensure compliance.

Ideally, 1-2 teachers will be employed with a special education endorsement who can serve as a regular education teacher but also provide services as needed. These teachers will collaborate closely with other general education teachers to adapt curriculum, align instruction, and implement accommodations consistently across settings. Instructional materials may include adapted texts, assistive technology, visual supports, and specialized instructional programs as appropriate to student needs.

Progress Monitoring and Evaluation of Student Success

The school will implement systematic progress monitoring to evaluate the academic and functional progress of students with disabilities. Special education teachers and service providers will collect data aligned to IEP goals using curriculum-based measures, formative assessments, observational data, and progress monitoring tools. Data will be reviewed regularly to assess student growth and the effectiveness of instructional strategies and supports.

IEP teams will meet at least annually, and more frequently as needed, to review progress, update goals, and adjust services or placements. Parents will receive regular communication regarding student progress toward IEP or 504 Plan goals. For students with more significant needs, progress monitoring will occur more frequently to ensure timely instructional adjustments.

The school will also use internal data reviews and compliance monitoring to ensure special education services are delivered with fidelity and in alignment with legal requirements. Instructional leaders and special education staff will engage in ongoing professional development focused on inclusive practices, differentiation, progress monitoring, and compliance to support high-quality implementation.

Through these systems and supports, the school will ensure that students with disabilities are accurately identified, appropriately supported, and provided meaningful access to rigorous academic instruction in the least restrictive environment possible, enabling them to make measurable progress toward their individualized goals.

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

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

The school will ensure that English Learner (EL) students have equitable access to the core curriculum through systematic identification, targeted instruction, and ongoing monitoring. All students will complete a home language survey at enrollment, and those who speak a language other than English will be assessed using a standardized English proficiency tool, such as the WIDA Screener. Teacher observations, prior records, and academic performance will supplement the assessment to avoid misidentification.

EL students will receive targeted support through evidence-based strategies, including sheltered instruction (e.g., SIOP model), scaffolding within general education classrooms, and small-group or pull-out sessions focused on vocabulary, reading comprehension, and academic language. Ideally, 1-2 teachers will be employed with an endorsement to teach English Language Learners who can serve as a regular education teacher but also provide services as needed. These teachers will collaborate closely with other general education teachers to adapt curriculum, align instruction, and implement accommodations consistently across settings. Curriculum and materials will be culturally responsive and aligned with state standards to ensure full participation in core academic programs.

Each EL student will have an Individualized Learning Plan (ILP) with measurable language and academic goals. Progress will be reviewed regularly using English proficiency assessments, classroom performance, and teacher observations. Students will exit EL services once they demonstrate proficiency and can access the curriculum independently, with post-exit monitoring continuing for two years to ensure sustained success.

Teachers who assume additional responsibilities related to case management, service coordination, or specialized instructional support will receive stipends to compensate for these added duties.

Student Assessment and Evaluation

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

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

The school will implement a comprehensive, data-driven assessment system to monitor student learning, guide instruction, and communicate progress to families and stakeholders. Students will participate in state assessments, including TNReady in grades 3–8 and End-of-Course (EOC) exams in high school, while the school will also administer MAP Growth, i-Ready Diagnostic (grades K–8), and the ACT (grades 10–11) to provide a more complete picture of student achievement and readiness. This multi-faceted approach ensures both alignment with Tennessee Academic Standards and meaningful, actionable data to drive instruction.

MAP Growth will be administered three times per year in mathematics, reading, and science across K-8, providing nationally normed, growth-focused data to track student progress and inform differentiated instruction. i-Ready Diagnostic, administered three times per year in grades K–8, offers detailed, standards-aligned insights into foundational and grade-level skills, allowing teachers to identify learning gaps and provide targeted interventions.

Students in high school will take the ACT, which provides a nationally recognized measure of college and career readiness. ACT data, combined with MAP Growth and EOC results, allows the school to evaluate readiness for post-secondary education, monitor long-term academic growth, and ensure students are on track to meet rigorous expectations.

Teachers and instructional leaders will regularly analyze data from these assessments to adjust instruction, plan small-group and individual interventions, and identify enrichment opportunities. Grade-level teams will meet to review trends, evaluate the effectiveness of interventions, and coordinate strategies across classrooms. School leadership will monitor schoolwide performance, ensure fidelity to RTI² and intervention programs, and allocate resources to support students who need additional assistance.

The school will maintain transparent communication with families. Students and families will receive individual reports after each testing window, detailing performance, growth, and recommended supports. Teacher-parent conferences, progress reports, and school-wide meetings will provide opportunities to discuss student achievement trends, intervention strategies, and next steps. By integrating state assessments, MAP Growth, i-Ready, and the ACT, the school ensures that student performance is measured comprehensively, instruction is

continuously refined, and all students are supported in achieving academic success. Below is a table summarizing the assessments administered to grade levels over the course of the year.

Month	K–2	3–8	9–12	Notes / Purpose
August / September	i-Ready Diagnostic (Fall)	i-Ready Diagnostic (Fall), MAP Growth (Fall)	MAP Growth (Fall)	Baseline data; identify skill gaps; inform RTI ² and differentiated instruction
October	–	–	–	–
November	–	–	–	–
December	i-Ready Progress Check / Lesson Monitoring	i-Ready Progress Check / Lesson Monitoring	MAP Growth progress monitoring	Formative monitoring; adjust instruction and interventions
January / February	i-Ready Diagnostic (Winter)	i-Ready Diagnostic (Winter), MAP Growth (Winter)	MAP Growth (Winter)	Mid-year growth measurement; adjust RTI ² interventions
March	–	TNReady Window (ELA/Math)	MAP Growth (Winter, optional)	State assessment for accountability; benchmark progress
April	–	MAP Growth (Spring)	MAP Growth (Spring)	Year-end growth measurement; finalize instructional adjustments
May	i-Ready Diagnostic (Spring)	i-Ready Diagnostic (Spring), TNReady Window (ELA/Math)	End-of-Course (EOC) Exams, MAP Growth (Spring)	Summative assessment; evaluate mastery of standards; inform next year's placement
October / April (HS)	–	–	ACT (10th Fall or 11th Spring)	College and career readiness benchmark; external norm comparison

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

The school will implement a comprehensive, data-driven assessment system to monitor student learning, inform instruction, and communicate progress to families, staff, and stakeholders. Students will participate in state assessments, including TNReady in grades 3–8 and End-of-Course (EOC) exams in high school, while the school also administers MAP Growth, i-Ready Diagnostic (grades K–8), and the ACT (grades 10–11) to provide a well-rounded understanding of student achievement, growth, and college readiness. This combination ensures alignment with Tennessee Academic Standards while providing actionable information to guide instruction.

Collection and Analysis of Data

Student achievement data will be collected throughout the year. TNReady and EOC exams provide summative, standards-aligned measures of grade-level mastery and readiness for subsequent courses. MAP Growth, administered three times per year across all grades, provides nationally normed, growth-focused data to identify strengths, gaps, and progress over time. i-Ready Diagnostic, administered three times per year in K–8, offers granular, standards-aligned information on foundational skills and prerequisite knowledge, allowing early identification of students who require targeted support. High school students will take the ACT as a benchmark for college and career readiness, providing external, nationally comparable data.

Using Data to Refine Instruction

Teachers and instructional leaders will use this data in recurring cycles of analysis. Grade-level teams will participate in weekly data meetings to review MAP learning continuum reports, i-Ready domain performance, classroom assessments, and student work samples. These meetings will focus on identifying trends, adjusting small-group instruction, modifying intervention schedules, and determining enrichment opportunities for advanced learners. School leadership will conduct quarterly data reviews to evaluate schoolwide progress, monitor subgroup performance, and assess the effectiveness of curriculum implementation and intervention systems.

Reporting to the School Community

To support accurate attendance tracking and clear communication of academic progress, the school anticipates using a secure, cloud-based student information system—such as Alma or a comparable platform—to collect daily attendance data and generate report cards and academic progress reports for families. This system will support real-time data entry, monitoring of attendance trends, and consistent communication with families, while remaining flexible to meet state reporting and compliance requirements.

Student academic progress will be reported regularly to the school community. Families will receive timely reports following each assessment cycle that explain student performance, growth, and recommended next steps. Teachers will communicate progress through

conferences and ongoing family communication, and school leadership will share aggregated performance data with stakeholders to promote transparency, accountability, and continuous improvement.

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

The school will implement a comprehensive, multi-tiered system to identify and address academic underperformance, fully aligned with Tennessee's guidelines for Response to Instruction and Intervention (RTI²) pursuant to State Board Rule 0520-01-03-.03. Central to this system is the use of data-driven assessments, including MAP Growth and i-Ready Diagnostic assessments, which allow for early identification of students who are performing below grade-level expectations. MAP Growth will be administered three times per year in mathematics, reading, and science to provide nationally normed, growth-focused data, while i-Ready will be administered three times per year in grades K–8 to deliver detailed diagnostic information on students' skill gaps and prerequisite knowledge. These assessments, combined with classroom-based evaluations and teacher observations, create a comprehensive picture of each student's academic needs.

Instruction is structured around a tiered RTI² model. All students receive high-quality, standards-aligned core instruction (Tier 1), with teachers using formative assessment data to differentiate instruction within the classroom. Students identified as at risk through MAP, i-Ready, or classroom assessments receive targeted small-group interventions (Tier 2) designed to address specific skill gaps. These interventions may include guided practice, tutoring, or supplemental digital lessons, with progress monitored bi-weekly to ensure effectiveness. Students who continue to struggle despite Tier 2 supports receive individualized, intensive interventions (Tier 3), which may include one-on-one instruction, specialized skill-building sessions, and close collaboration with specialists. Progress in Tier 3 is monitored weekly, and interventions are adjusted dynamically based on ongoing data.

Teachers use assessment data to inform daily instruction, adjust groupings, and differentiate assignments. Grade-level teams analyze trends across classrooms, evaluate intervention effectiveness, and coordinate instructional strategies to ensure consistency. School leadership reviews schoolwide performance, monitors fidelity to RTI² implementation, and allocates resources to support students who need additional assistance. Families are engaged throughout the process, receiving regular progress reports, diagnostic results, intervention plans, and strategies for supporting learning at home. Parent-teacher conferences provide opportunities to discuss student progress, interventions, and next steps.

Through this system, the school ensures that students who are struggling receive timely, targeted, and effective support, while continuously refining instruction to meet the Tennessee Academic Standards and the learning needs of all students.

Educational Program Capacity

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

Table 4. Team Members					
Name	City and State of Residence	Current Title and Employer	Area(s) of Expertise	Part of the Applicant Team? (Y/N)	Position in Proposed School (e.g., board chair, school leader)
Linda Campbell	Memphis, TN	Associate Professor of Educational Leadership, Union University	Educational Leadership and School Administration	Yes	Steering Committee
Joshua Dougan	Jackson, TN	Assistant District Attorney for Madison County	Legal advice and research	No	Vice Chairman of Board
Kay Griffin	Jackson, TN	Retired English teacher, Jackson-Madison County Schools	Education and community relations	No	Board Secretary
Samuel Dub Oliver	Jackson, TN	President, Union University	Business, operations, school leadership	Yes	Steering Committee
Jeff Perkins	Greenfield, TN	Retired vice president and chief operations officer, Akin and Porter Produce	Operational Leadership and Management	No	Chairman of Board
Catherine Reinhard	Jackson, TN	Assistant Professor of Education and Licensing Officer, Union University	Educational Leadership and School Administration	Yes	Steering Committee
Rick Taphorn	Jackson, TN	Vice President for Business Affairs, Union University	Operations and Financial Management	Yes	Steering Committee

Teresa Tritt	Jackson, TN	Dean of College of Education, Union University	Educational Leadership and School Administration	Yes	Steering Committee
Robert Williams, Jr.	Jackson, TN	Assistant Professor of Accounting, Union University	Business, charter school management	Yes	Steering Committee

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

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

We have not hired for this position yet.

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

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

As a steering committee, the members of the application team are equipped to direct the future of Union Academy. The proposed school’s academic plan will be designed and executed by a highly qualified, interdisciplinary team of school-based leaders drawn from Union University with deep expertise in educational leadership, curriculum and instruction, assessment, operations, and performance management. Collectively, this team brings extensive experience in PK–12 school leadership preparation, educator licensure, data-informed decision-making, and organizational management, ensuring the school is well-positioned to implement a rigorous, mission-aligned academic program that meets the needs of all students.

School Leadership, Administration and Governance

The steering committee includes senior academic administrators and faculty with extensive experience in educational leadership and school administration. The Dean of the College of Education and multiple faculty members in educational leadership provide strong capacity in school design, instructional leadership, compliance, and continuous improvement. This team

has direct experience preparing principals, assistant principals, and teacher leaders and is well-versed in effective school structures, professional culture, and accountability systems. In addition, senior university leadership contributes expertise in organizational oversight, strategic planning, and operational decision-making, ensuring strong administrative execution while maintaining appropriate separation from board governance responsibilities.

Curriculum, Instruction, and Assessment

The steering committee possesses deep collective expertise in curriculum design, instructional leadership, and assessment aligned to state standards and best practices. Faculty members with backgrounds in teacher preparation and licensure bring direct knowledge of standards-aligned instruction, assessment literacy, and evidence-based instructional practices. This expertise supports the development of a coherent, vertically aligned curriculum; the use of formative and summative assessments to monitor student progress; and the implementation of instructional coaching and professional learning systems that promote continuous improvement in teaching and learning.

Meeting the Needs of Special Populations

The team's experience in educator preparation and licensure includes extensive work related to differentiated instruction, inclusive practices, and legal and ethical obligations for serving special populations. Collectively, the team has strong knowledge of IDEA, Section 504, English Learner supports, gifted education, and interventions for at-risk students. This capacity ensures the academic plan is designed with built-in supports for students with disabilities, English learners, homeless and foster youth, migrant students, and gifted learners through appropriate identification processes, instructional accommodations, targeted interventions, and collaboration with specialized service providers as needed.

Performance Management

The steering committee brings significant expertise in performance management, data analysis, and accountability systems. Members with backgrounds in educational leadership and accounting contribute to the development of clear performance metrics, data dashboards, and review cycles that monitor student achievement, instructional effectiveness, and operational fidelity. This collective capacity supports the use of data to inform instructional adjustments, professional development priorities, and resource allocation, ensuring the academic program remains responsive and results-driven.

Parent and Community Engagement

The team is well-positioned to lead meaningful parent and community engagement through its strong ties to the local community and experience in mission-driven educational environments. Collectively, team members bring experience in family communication, stakeholder collaboration, and community partnerships. These strengths support the implementation of intentional strategies to engage families as partners in student learning, communicate academic expectations and progress clearly, and foster a school culture grounded in trust, transparency, and service to the broader community.

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

Union Academy will fill its principal/headmaster position through a structured, intentional hiring process designed to ensure strong instructional leadership and alignment with the school's mission. Recruitment for the principal/headmaster role will begin in September 2026 with the timeline of hiring someone by January 2027. This allows sufficient time for a thorough selection process and a smooth transition into school launch planning.

The principal/headmaster will serve as the school's chief instructional and operational leader and must meet the following qualifications and criteria:

- Hold a valid Tennessee instructional leader license
- Demonstrate a strong record of instructional leadership, including curriculum implementation, teacher development, and data-driven decision-making
- Adhere to Union University's lifestyle statement
- Be an active member of a Christian church
- Serve as a positive role model with strong character and visible engagement in the community
- Demonstrate leadership capacity aligned with the school's academic model, mission, and expectations for professional excellence

The recruiting and selection process will be conducted in collaboration with Union University's Human Resources Department and will include a national and regional search. Candidates will be evaluated through a multi-step process that may include application review, structured interviews, reference checks, credential verification, and performance-based assessments such as leadership scenario discussions or instructional case studies. Final selection will be made based on demonstrated leadership effectiveness, instructional expertise, mission alignment, and readiness to lead a start-up charter school.

Once hired, the principal/headmaster will partner closely with Union University's HR department to lead the recruitment, selection, and onboarding of teachers and instructional staff between January and April 2027. This collaborative process ensures that all staff are credentialed, mission-aligned, and prepared to implement the school's academic program with fidelity from the first day of instruction.

This phased hiring approach ensures that Union Academy will enter its opening year with strong leadership in place, a cohesive instructional team, and the organizational capacity necessary to support high-quality teaching and learning.

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

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

Board Members

The governing board of Union Academy is composed of a subset of Union University's Board of Trustees, currently including Jeff Perkins (Chairperson), Joshua Dougan (Vice Chairperson), and Kay Griffin (Board Secretary). Collectively, these individuals bring substantial experience in institutional governance, fiduciary oversight, and strategic leadership through their service on the University's Board of Trustees, equipping them to provide effective oversight and direction for the charter school.

Governance and Fiduciary Oversight

As trustees of a comprehensive university, board members have demonstrated experience overseeing complex nonprofit operations, ensuring compliance with legal and regulatory requirements, adopting institutional policies, and exercising fiduciary responsibility for organizational assets. This background provides a strong foundation for charter school governance, including adherence to Tennessee public charter law, ethical standards, and accountability expectations.

Oversight of Academic Performance

Through their roles as university trustees, board members have experience setting strategic priorities, monitoring institutional performance, and holding senior leadership accountable for outcomes aligned with mission and goals. This experience supports effective oversight of the charter school leader, monitoring progress toward academic goals, and ensuring continued alignment with Union Academy's mission.

Financial Oversight

Board members collectively bring experience in financial stewardship, including budget review and approval, oversight of financial controls, and long-term fiscal planning within a nonprofit higher education context. This experience positions the governing board to provide appropriate oversight of Union Academy's budget, financial reporting, and sustainability planning.

Community Engagement and Stakeholder Responsiveness

As institutional leaders, board members have experience representing the university to external stakeholders, maintaining transparency, and responding to community needs and

expectations. This background supports responsible engagement with families, local partners, and the broader community to build trust and ensure responsiveness as Union Academy is established.

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

The governing board of Union Academy was established by Union University through the appointment of a subset of its Board of Trustees. Initial board members were selected based on their current leadership roles within the University, demonstrated qualifications reflected through their appointment and service as trustees, and their expressed willingness to serve in a charter school governance capacity. These trustees were identified as well positioned to provide fiduciary oversight, institutional stability, and continuity during the school's start-up phase.

Board members were selected from among individuals whose qualifications and experience had already been evaluated through Union University's trustee appointment process. That process considers candidates' experience in areas such as education leadership or academic oversight; nonprofit, higher education, or public-sector governance; financial management and fiduciary responsibility; legal and regulatory compliance; strategic planning; and community engagement. In addition, trustees' availability and willingness to assume additional governance responsibilities were considered in determining service on the Union Academy governing board.

Trustees selected to serve on the Union Academy governing board serve in a distinct fiduciary role on behalf of the charter school and will operate under separate bylaws, ethics policies, and accountability requirements specific to Tennessee public charter governance. Board members previously completed conflict-of-interest disclosures and governance orientation in their capacity as members of Union University's Board of Trustees, including training related to nonprofit governance and fiduciary responsibility. Union Academy-specific disclosures, orientation, and charter governance training will be completed upon formal establishment of the charter school governing board.

At the time of selection, the governing board demonstrated strong capacity in institutional leadership, governance, and financial oversight. Identified gaps included direct K–12 operational expertise, parent representation, and broader community-based perspectives. These gaps will be addressed through future recruitment efforts following school authorization. A parent representative will be added once the school is established, and additional members with K–12 instructional leadership, charter operations, or community engagement experience will be appointed in accordance with the charter and governing documents as the school transitions from start-up to full operation. Any prospective Union Academy board members

who are not currently serving on Union University's Board of Trustees will be subject to review and approval by the Board of Trustees.

Ongoing Recruitment and Board Development

As Union Academy matures, Union University will engage in ongoing board development and targeted recruitment within the University's Board of Trustees, while also appointing any charter-authorized non-trustee members in accordance with the charter and governing documents. All appointments will remain subject to the University's exclusive authority and will be guided by identified governance needs and required competencies.

Identification of Gaps and Plans to Address Them

While the initial governing board will reflect strong capacity in nonprofit governance, higher education leadership, and strategic oversight, the board will need to strengthen representation in specific areas as the school transitions from planning to operation. Anticipated gaps could include additional expertise in K–12 instructional leadership, charter school finance and budgeting at the school level. If these gaps exist, the board may recruit additional members with demonstrated experience in public K–12 education, school-based financial management, and community engagement, particularly individuals with ties to the local Jackson area.

Board composition will be reviewed annually using a governance competency matrix to ensure alignment with the school's evolving needs. This intentional, data-informed approach to board selection and development ensures the governing board maintains the capacity, independence, and expertise necessary to effectively oversee academics, operations, and finance in service of the school's mission and students.

Operations Plan & Capacity

Governance

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

Union Academy is governed by an independent, nonprofit governing board that holds full legal, fiduciary, and academic authority for the public charter school. Union University retains exclusive authority to appoint the Union Academy governing board and has appointed a subset of its Board of Trustees to serve in this capacity. These trustees serve in a distinct fiduciary role on behalf of Union Academy as a separate nonprofit entity and operate under separate bylaws, ethics policies, and accountability requirements applicable to public charter schools.

Trustees are selected based on demonstrated expertise, availability to serve, and the absence of conflicts of interest. This governance structure ensures strong oversight, legal compliance, and alignment with the school's public education mission while maintaining appropriate independence from Union University's broader institutional governance responsibilities.

While Union Academy benefits from a strategic partnership with Union University, the governing board operates independently and retains sole authority over charter governance decisions. The board is responsible for policy, oversight, and accountability and delegates day-to-day management and instructional leadership to the Head of School/Principal.

Board Powers and Duties

The governing board's powers and duties are organized across three primary domains:

Academic Oversight

The governing board ensures the academic success of the school by:

- Approving the school's academic program, instructional model, and curriculum frameworks
- Monitoring student achievement, growth, and accountability outcomes through regular data review
- Ensuring compliance with all state and federal academic requirements, including assessment, accountability, special education, and English Learner mandates
- Holding the Head of School/Principal accountable for academic performance and continuous improvement

Operational Oversight

The governing board provides operational oversight by:

- Hiring, supporting, evaluating, and, if necessary, terminating the Head of School/Principal
- Establishing and approving policies related to enrollment, discipline, staffing, safety, and school operations
- Ensuring systems are in place to support effective facilities management, technology, and student services
- Reviewing and approving contracts and partnerships with vendors and service providers

Financial Oversight

The governing board ensures fiscal responsibility and sustainability by:

- Approving the annual budget and monitoring financial performance through regular financial reports
- Establishing financial policies and internal controls to ensure transparency and accountability
- Ensuring timely completion of independent audits and compliance with all financial reporting requirements
- Safeguarding the long-term financial health and sustainability of the school

Board Capacity and Qualifications

The governing board is composed of members selected for their collective expertise and capacity to provide effective oversight in key areas, including public and nonprofit governance, education leadership, financial management, legal and regulatory compliance, strategic planning, and community engagement. Board members demonstrate a strong commitment to

the school's mission, an understanding of public charter school governance, and the ability to act in the best interests of the school and its students.

Consistent with the charter and governing bylaws, the governing board will include a parent representative once Union Academy is operational, providing a parent voice while remaining subject to Union University's exclusive appointment authority.

Board Development, Ethics, and Accountability

Board members participate in orientation and ongoing training related to charter governance, Tennessee public charter law, and nonprofit governance best practices. The board operates under a formal conflict-of-interest policy consistent with state law and nonprofit standards. Members disclose potential conflicts annually and recuse themselves from decisions where a conflict exists, ensuring ethical governance, transparency, and public trust.

Relationship Between the Board and School Leadership

The governing board maintains a clear separation between governance and management. The board sets strategic direction, establishes policies, and defines performance expectations, while the Head of School/Principal is responsible for daily operations and instructional leadership. The board evaluates the Head of School/Principal annually using criteria aligned to academic outcomes, operational effectiveness, and organizational leadership, supported by regular reporting and communication to ensure accountability and continuous improvement.

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

Pursuant to T.C.A. § 49-13-109, the governing board will add a parent representative within six months of the school's opening. The parent representative will be a current parent or legal guardian of an enrolled student and will serve as a voting member of the board in accordance with state law and the board's bylaws. While the parent representative will serve as a voting member of the governing board, appointment authority remains with Union University as the sole and controlling member, consistent with the charter and bylaws.

Within the first academic semester, the board will initiate a transparent recruitment process by broadly communicating the opportunity to all families through school-wide communications and the school website. The role, responsibilities, time commitment, and governance expectations will be clearly outlined. To avoid conflicts of interest, parents who are employees of the school or have contractual relationships with the school will not be eligible to serve.

Interested parents will submit a brief application describing their interest and relevant experience. Applications will be reviewed by the board's governance or nominations committee, which will recommend candidates to the full board based on alignment with the school's mission, ability to fulfill fiduciary responsibilities, and willingness to serve in a governance role. The parent

representative will be selected by majority vote of the board and seated within the required six-month timeframe.

Upon selection, the parent representative will participate in a structured onboarding process, including orientation to the school's mission, governing documents, board policies, and legal and ethical responsibilities. Ongoing governance training and mentorship will be provided to support effective participation in board service.

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

- Year 1; and
- At full capacity.

Union Academy will operate under a governance model in which the Governing Board directly oversees and supports the Principal/Head of School, who serves as the school's chief instructional and operational leader. The Principal/Head of School is responsible for day-to-day school operations, instructional leadership, staff supervision, student achievement, school culture, and implementation of the charter.

The Governing Board will retain responsibility for governance, policy, oversight, and accountability and will not engage in daily management. The Board Chair will serve as the primary liaison between the Governing Board and the Principal/Head of School to ensure consistent communication, clarity of expectations, and appropriate boundaries between governance and administration.

Board Support, Development, and Evaluation of the School Leader

The Governing Board will support the Principal/Head of School by establishing clear performance expectations, approving policies and budgets aligned to the charter, and ensuring access to professional development and leadership support as appropriate. Board support will be focused on enabling the school leader to effectively carry out instructional and operational responsibilities while maintaining mission alignment and compliance.

The board will engage in an annual goal-setting process with the Principal/Head of School that includes measurable academic performance targets, operational benchmarks, and leadership priorities aligned to the school's charter and accountability framework. Progress toward these goals will be monitored throughout the year through regular board reports, academic data reviews, and scheduled check-ins.

The Principal/Head of School will be evaluated annually by the Governing Board using a formal evaluation process aligned to student achievement and growth, instructional quality, organizational effectiveness, financial stewardship, compliance, and mission fidelity. Evaluation

results will be used to inform continued leadership development, contract decisions, and goal-setting for the subsequent year.

Organizational Structure and Lines of Authority

The Governing Board will maintain a governance-only role focused on mission stewardship, academic oversight, financial sustainability, and legal compliance. The Principal/Head of School will hold full responsibility for day-to-day operations and instructional leadership and supervises all school-based staff. This structure will ensure clear lines of authority, accountability, and effective separation between governance and management.

Organizational Charts (Attachment 4)

Attachment 4 includes organization charts illustrating the school's governance and management structure in Year 1 and at full capacity. The charts clearly delineate lines of authority and reporting relationships among the Governing Board, Principal, school leadership team, advisory bodies, and external service providers, including Union University. Parent and Community Advisory Council provides stakeholder input but have no governance or decision-making authority. As the school grows, leadership capacity expands, while governance roles and reporting lines remain consistent and clearly defined.

39. Describe the board's policies related to:

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

Union Academy will be governed by an independent public charter school governing board that operates separately from the Board of Trustees of Union University. The Union Academy Governing Board will conduct its own meetings, maintain separate agendas and minutes, and exercise independent authority consistent with the approved charter and applicable state and federal law. Union University board meetings and governance activities are distinct and will not substitute for or overlap with the charter school's governing board meetings.

Planned Meeting Frequency

The Union Academy Governing Board will meet on a regular, planned schedule, with meetings held at least quarterly, and more frequently as needed to fulfill its oversight responsibilities. All meetings will be publicly noticed and conducted in compliance with Tennessee open meetings and public records laws. Special meetings may be called in accordance with board policy to address time-sensitive matters related to academic performance, financial oversight, or legal compliance.

Committee and Advisory Structures

To support effective governance, the board will establish standing committees while retaining decision-making authority at the full board level. Committees may include:

- Governance Committee, responsible for board development, nominations, training, and compliance;
- Finance Committee, responsible for budget review, financial reporting, audits, and internal controls; and
- Academic or School Performance Committee, responsible for monitoring student achievement, accountability measures, and progress toward charter goals.

Committees serve in an advisory capacity and make recommendations to the full board but do not exercise independent governing authority. In addition, the board may establish non-governing advisory groups, such as parent or teacher advisory councils, to provide stakeholder input without fiduciary or decision-making authority.

Ethical Standards and Conflict of Interest

The governing board will adopt and enforce a comprehensive Code of Ethics and Conflict of Interest Policy consistent with Tennessee law and nonprofit governance best practices. Board members will complete annual conflict-of-interest disclosures and are required to disclose any actual or potential conflicts as they arise. Members with a conflict will recuse themselves from related discussions and votes, with all recusals documented in the official meeting minutes. The Governance Committee or Board Chair will oversee compliance with ethical standards and ensure appropriate corrective action when necessary.

Hearing and Addressing Complaints

The governing board will maintain a formal, written complaint policy that establishes a clear process for hearing and addressing concerns from parents, students, staff, or community members. Complaints will follow a structured escalation process, beginning at the school or administrative level when appropriate and advancing to the governing board only if unresolved. The board will review complaints in a timely, fair, and confidential manner, focusing on governance-level and policy-related issues rather than day-to-day operational matters. All complaints and resolutions will be documented in accordance with board policy and applicable law.

40. Provide the following attachments:

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

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

Staffing

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

Union Academy will operate under a clear, mission-driven leadership and staffing structure designed to ensure high-quality instruction, effective operations, and strong accountability. The structure emphasizes on-site instructional leadership, clear lines of authority, and appropriate support from Union University, while maintaining the Governing Board's governance-only role.

At the governance level, the Governing Board provides strategic oversight, approves policies and budgets, ensures legal and fiscal compliance, and holds school leadership accountable for academic and operational outcomes. The board focuses exclusively on governance and does not engage in day-to-day management, with authority and responsibilities clearly delineated between governance and school administration.

The Principal/Head of School serves as the school's chief instructional and operational leader and reports directly to the Governing Board. The Principal/Head of School is responsible for implementing the board-approved vision, overseeing daily school operations, supervising all school-based staff, and ensuring high-quality teaching and learning aligned with the school's mastery-based, structured curriculum. The Principal/Head of School is accountable for student achievement, school culture, staff performance, and operational effectiveness.

Supporting the Principal/Head of School, the leadership team will include:

- Assistant Principal (added in Year 3), responsible for grade-level or content-area instructional leadership, teacher observations and coaching, and support for curriculum and assessment implementation; and
- Dean of Academics and Support Services, responsible for oversight of special education, intervention services, counseling, and compliance with federal and state student support requirements. This role includes coaching teachers and instructional assistants, conducting classroom observations, leading collaborative data meetings focused on student achievement, and implementing the school's professional development plan.

Instructional staff, including teachers and instructional support personnel, will be employed by Union University and leased to Union Academy through formal agreements. This arrangement provides access to a qualified, stable, and mission-aligned workforce while allowing school leadership to focus on instruction, student outcomes, and school culture. Teachers are responsible for delivering core instruction, differentiating to meet student needs, and participating in ongoing professional development coordinated collaboratively by school leadership and the university.

Non-governing advisory bodies, including parent and teacher advisory councils, may be established to provide feedback and recommendations to school leadership. These groups will not hold governance authority, fiduciary responsibility, or decision-making power.

42. Explain the school's strategy to recruit and retain high-performing teachers. Outline the school's proposed salary ranges, employment benefits, and any incentive structures. Compare the salary ranges to the resident district and explain how they are sufficient to recruit teachers.

The school's strategy to recruit and retain high-performing teachers is anchored in a partnership with Union University, which will hire teachers directly and lease them to the charter school. This model ensures access to a qualified, mission-aligned talent pool while streamlining administrative and human resources functions. Teachers will be selected by the university through a rigorous hiring process that prioritizes content knowledge, instructional skill, and alignment with the school's faith-based educational model.

Recruitment and Hiring Process

The university will lead recruitment efforts, targeting recent graduates from its educator preparation program, experienced educators in the region, and candidates with demonstrated effectiveness in rigorous academic environments. The selection process will include application review, interviews, possible demonstration lessons, reference checks, and assessment of alignment with the school's mission and instructional approach. By leveraging the university's hiring infrastructure, the school ensures that teachers are vetted, credentialed, and prepared to deliver high-quality instruction from the first day of school.

Salary, Benefits, and Incentives

Teachers will be employees of the university and compensated through a salary and benefits package that is competitive with, and comparable to, the resident district. Placement within the salary scale will consider years of experience, certification, and demonstrated effectiveness. Benefits may include health insurance, retirement plan participation, paid time off, and professional development opportunities, all administered by the university.

The university may also implement performance-based incentives or stipends for instructional leadership, mentoring, or teaching in high-need areas. This arrangement allows the school to provide competitive total compensation while reducing administrative burden for the board and school leadership.

Professional Support and Retention

Teachers will receive ongoing professional development and instructional coaching coordinated jointly by the university and school leadership. Collaborative planning time, access to curriculum and instructional resources, and regular feedback will support teacher effectiveness and job satisfaction, enhancing retention. Because teachers are employed by the university, the school benefits from consistent staffing and reduced turnover risk, while teachers gain access to university-led professional development and advancement opportunities.

Comparison to Resident District

This staffing model ensures that teacher compensation and benefits remain competitive with the resident district while also providing unique advantages, including access to university

resources, leadership pathways, and a structured instructional support system. By outsourcing hiring and human resources functions to the university, the school can focus on student outcomes and instructional quality without compromising competitiveness in the local labor market.

Through the university hiring and leasing model, the school guarantees a high-quality, stable teaching workforce, aligned with its mission and instructional philosophy, and supported by robust professional development and competitive compensation.

43. Describe the core components of the school’s professional development plan and detail how those components will support effective implementation of the school model and instructional plan.

The school’s professional development (PD) plan is intentionally designed to ensure that all staff members are fully equipped to implement the school’s faith-based educational model and rigorous instructional program with fidelity. The plan integrates ongoing training, coaching, collaboration, and reflection to promote continuous professional growth, instructional excellence, and student achievement. Professional development is mission-driven, data-informed, and aligned with both Tennessee academic standards and the school’s expectations for character formation and school culture.

Mission-Driven Induction and Orientation

All new staff are required to sign a Statement of Faith and agree to abide by the school’s Code of Conduct as a condition of employment. In addition, all new staff participate in a comprehensive induction and orientation process designed to establish a shared understanding of the school’s mission, core values, instructional expectations, and culture from the outset.

This multi-day onboarding experience includes training on the school’s mission, worldview integration, and cultural norms, as well as explicit instruction in curriculum implementation, pedagogical practices, and classroom routines. New teachers are paired with experienced mentors who model effective instructional practices and support alignment with the school’s educational approach. This induction process ensures consistency in instructional delivery and fidelity to the school’s mission and culture beginning on day one.

Ongoing Instructional Training

Ongoing professional learning builds teacher capacity to deliver high-quality instruction while maintaining strong academic rigor. Teachers participate in weekly collaborative meetings organized by grade level or subject area to analyze student work, share instructional strategies, and reflect on practice. Quarterly workshops address pedagogy, classroom management, differentiation, assessment practices, and the effective use of 1:1 instructional technology. Curriculum-specific training—such as Singapore Math, Amplify CKLA, and Wit & Wisdom—ensures mastery of content and instructional methods. These ongoing learning opportunities support fidelity to the instructional program while reinforcing the school’s mission and values.

Data-Informed Coaching and Feedback

Instructional quality is strengthened through continuous coaching and feedback grounded in data and observation. School leaders conduct regular classroom observations followed by structured feedback conferences to support teacher growth. Teachers engage in data review sessions to analyze student achievement and identify areas for instructional adjustment. Collaborative planning and problem-solving sessions emphasize alignment with schoolwide instructional strategies and shared expectations for student engagement and character development. This approach promotes reflective practice and continuous improvement.

Leadership Development

The professional development plan also prioritizes leadership development to ensure that school leaders can effectively support teachers and sustain a mission-driven culture. Leaders participate in annual retreats focused on instructional leadership, coaching, school culture, and servant leadership principles. Ongoing training addresses curriculum oversight, data-driven decision-making, and teacher evaluation systems. Leaders also engage in peer learning networks with other high-performing charter school leaders to share best practices and strengthen organizational capacity.

Cultural and Professional Community Building

Professional development supports a strong professional culture rooted in shared values, collaboration, and mutual accountability. Regular opportunities for reflection, team building, and professional dialogue reinforce a positive school climate and strong relationships among staff. Workshops, book studies, and retreats emphasize collaboration, restorative practices, and mission-aligned interactions with students and families, fostering a unified and supportive learning community.

Continuous Evaluation and Improvement

The effectiveness of professional development is evaluated regularly to ensure alignment with school goals and student outcomes. Staff feedback, student achievement data, and behavioral indicators are reviewed annually to guide PD priorities. The school adjusts professional learning opportunities in response to emerging needs, curriculum updates, and research-based practices, maintaining a continuous cycle of improvement.

Overall Alignment

Collectively, the professional development plan supports the school's instructional and cultural model by ensuring academically rigorous, standards-aligned instruction; fostering a cohesive, mission-driven school culture; providing structured coaching and evaluation; and promoting collaboration and reflective practice. Through this integrated approach, teachers and leaders are fully prepared to implement the school's academic program and sustain its educational vision with fidelity.

Facilities

44. Describe facility needs based on the educational program and projected enrollment.

Union Academy's facility needs are intentionally aligned to its educational program, projected enrollment, and phased implementation plan. At opening, the school will serve elementary grades and requires a facility that supports a structured instructional model, inclusive practices, and student well-being, while meeting all applicable Tennessee building, health, safety, and accessibility requirements.

Instructional Space Requirements

Based on projected enrollment, the school's immediate classroom needs include:

- Three kindergarten classrooms
- Three first-grade classrooms
- Two second-grade classrooms
- Two third-grade classrooms
- Two fourth-grade classrooms
- Two fifth-grade classrooms

Instructional classrooms are expected to range from 850–1,000 square feet per classroom, resulting in approximately 12,000–14,000 square feet dedicated to core instructional space.

Administrative and Student Support Space

The facility must include:

- Principal/Head of School office (120–150 sq. ft.)
- Front office/secretary and reception area (300–400 sq. ft.)
- Dean of Academics and Support Services office (120–150 sq. ft.)

Shared and Common Spaces

- Cafeteria or multipurpose space (2,500–3,500 sq. ft.)
- Gymnasium or indoor physical education space (4,000–6,000 sq. ft.)

Non-instructional space is estimated at 25–30% of total square footage.

Total Estimated Facility Size

The school anticipates an initial facility requirement of approximately 25,000–30,000 square feet, depending on configuration and shared-use efficiencies.

Tennessee Fire Code, ADA, and School Safety Compliance

Any selected facility will fully comply with applicable Tennessee and local fire codes, including occupancy requirements, fire alarm and suppression systems, emergency exits, and fire marshal approval prior to occupancy. The facility will also meet all ADA accessibility requirements, including accessible entrances, restrooms, classrooms, common areas, parking, and routes of travel.

School safety planning will align with Tennessee Department of Education school safety expectations, including secure entry points, controlled visitor access, emergency preparedness protocols, and coordination with local emergency responders.

Long-Term Facilities Vision

In the long term, Union Academy aspires to develop a purpose-built school facility located on Union University's campus to provide a permanent, stable, and mission-aligned home for the school. This long-term vision reflects the sponsor's commitment to sustainability, safety, and educational excellence. Any future campus-based facility would be developed in compliance with all charter school independence, governance, and public access requirements and would not diminish the Governing Board's independent authority or the school's public school status. Planning for a permanent facility would occur only after the school demonstrates operational stability, enrollment sustainability, and authorizer approval, and would be structured to ensure fiscal responsibility and continued compliance with state and federal law.

45. Describe the progress to date of identifying and securing a facility in the proposed neighborhood/community that will meet the needs of the proposed school, as described above. Name the individual(s) on the sponsor's team leading the search as well as any brokers or real estate consultants supporting the search.

Union Academy is currently in the process of exploring and evaluating facility options within the proposed neighborhood and broader Jackson community. While a specific site has not yet been finalized, the sponsor has initiated a deliberate and structured facilities search to identify a location that aligns with the school's academic program, enrollment projections, safety requirements, and long-term growth plans.

The facility search is being led by Union University's Chief Financial Officer (CFO), who brings extensive experience in financial planning, facilities oversight, and contract negotiation. The CFO is working in coordination with the sponsor's leadership team to assess potential options based on suitability for a K–12 public charter school, including considerations such as location, size, condition, accessibility, compliance with building and safety codes, and overall cost sustainability.

At this stage, the sponsor is exploring multiple pathways, including existing educational facilities, adaptive reuse of commercial or institutional properties, and potential partnerships that could support a long-term, mission-aligned facility solution. As options are evaluated, the sponsor will engage appropriate professionals, such as real estate brokers, facilities consultants, architects, and legal counsel, as needed to support due diligence, negotiations, and compliance requirements.

The sponsor is committed to securing a facility that is safe, accessible, and conducive to high-quality instruction, while remaining financially responsible and aligned with the school's projected enrollment and programmatic needs. Facility selection and finalization will occur in

advance of opening to ensure adequate time for any necessary renovations, inspections, and approvals.

Transportation

46. Describe the plan to provide daily transportation to students, if applicable. Detail whether the proposed school will provide its own transportation services, contract out for transportation, or a combination thereof. If the school will not provide daily transportation services to and from school, describe how students will get to and from school and how the school will address any transportation barriers for student attendance.

The proposed school will not provide daily transportation services to and from school. Families will be responsible for arranging transportation for student arrival and dismissal. This policy does not apply to students whose IEPs or 504 Plans require transportation, as described below.

The school's daily dismissal time will be 3:30 p.m. To support families who are unable to pick up students at dismissal time, the school will offer an aftercare program operating immediately following dismissal. The aftercare program will provide a safe, supervised environment for students and will be available to families for a fee. Program details, including hours of operation and fee structure, will be communicated to families prior to enrollment.

The school will proactively communicate transportation expectations during the enrollment process to ensure families are fully informed. Attendance data will be monitored regularly, and the school will work with families on a case-by-case basis to address transportation-related challenges that may impact student attendance. While transportation services will not be provided, the school is committed to minimizing barriers to attendance through clear communication, consistent scheduling, and the availability of after-school supervision.

47. Describe the plan to provide transportation to students whose individualized education plan (IEP) or 504 plan requires transportation to ensure the student receives a free and appropriate public education (FAPE) pursuant to 34 CFR § 300.34(c) and Section 504 of the Rehabilitation Act of 1973.

While the school will not provide daily general education transportation, the school will ensure that transportation is provided as a related service for any student whose Individualized Education Program (IEP) or Section 504 Plan requires transportation in order to receive a free and appropriate public education (FAPE), in accordance with 34 CFR § 300.34(c) and Section 504 of the Rehabilitation Act of 1973.

Transportation needs will be determined exclusively by the IEP or 504 team and documented in the student's plan. When transportation is identified as a required related service, the school may contract with Union University as a third-party transportation provider, subject to approval by the school's governing board. In this capacity, the university will act solely as a service

provider and will not have decision-making authority regarding student eligibility, special education services, or educational programming.

Transportation services will be provided only when necessary to ensure access to educational services and will comply with all applicable safety, supervision, accessibility, and insurance requirements. To promote responsible fiscal management, transportation will be arranged on an as-needed basis, utilizing existing university transportation resources rather than maintaining a dedicated school transportation fleet. Service costs and delivery will be reviewed annually to ensure continued compliance, effectiveness, and cost efficiency.

Through this approach, the school ensures full compliance with federal and state law, safeguards equitable access to educational services for students with disabilities, and exercises prudent stewardship of public funds while meeting its obligation to provide FAPE.

Health and Safety

48. Describe the plan for meeting the medical needs of students, including how the school will provide nursing services.

Union Academy will meet the medical and health needs of students through a contracted partnership with Union University's Health Services, ensuring access to qualified medical professionals while maintaining cost-effective, compliant operations.

Nursing and Medical Services

Union University's Health Services will provide licensed nursing support to Union Academy through a contracted services agreement. Nursing services will include:

- On-site nursing services on a scheduled basis during the school week;
- Oversight of student health records, immunization compliance, and medication administration in accordance with Tennessee law;
- Management of chronic health conditions and development of Individualized Health Plans (IHPs);
- First aid and response to illness or injury during the school day;
- Coordination of emergency medical response when necessary;
- Communication with families regarding student health needs.

Licensed nursing personnel will operate in compliance with Tennessee Department of Education requirements and applicable state health regulations.

Tennessee School Health Screenings

Union Academy will ensure compliance with Tennessee school health screening requirements as outlined by the Tennessee Department of Education and the Tennessee Department of Health. In coordination with Union University's Health Services, the school will:

- Conduct or coordinate required health screenings, including vision, hearing, growth (height/weight), and other screenings as required by grade level;
- Provide appropriate notifications to parents or guardians regarding screening results;

- Refer students for follow-up evaluation or services when screenings indicate potential concerns;
- Maintain accurate documentation of screenings and follow-up actions in student health records.

Health screenings will be conducted in a manner that protects student privacy and complies with all applicable confidentiality requirements.

Emergency Response and Staff Training

Union Academy will maintain written protocols for medical emergencies, including coordination with local emergency medical services. School staff will receive training in first aid, CPR, and emergency response procedures, with guidance and oversight provided by contracted nursing personnel.

Special Health Needs and Accommodations

For students with medical needs identified through an Individualized Education Program (IEP), Section 504 plan, or Individualized Health Plan (IHP), nursing services will be coordinated to ensure that required health supports are provided during the school day. Union University nursing staff will collaborate with school leadership, special education providers, and families to ensure compliance with all applicable federal and state requirements.

Oversight and Compliance

The Principal/Head of School will oversee the contracted medical and health services agreement to ensure compliance with all health, safety, and reporting requirements. As the school matures, the Principal/Head of School may delegate aspects of day-to-day coordination to appropriate school-based staff, while maintaining ongoing collaboration with Union University's Health Services to ensure continuity, compliance, and high-quality support.

49. Identify the person or position responsible for school safety operations, detailing the responsibilities of this position, and providing the approach and timeline to develop a school safety plan in accordance with T.C.A. § 49-6-804 through T.C.A. § 49-6-808.

The Principal/Head of School will be the position responsible for overseeing all school safety operations and ensuring full compliance with T.C.A. § 49-6-804 through T.C.A. § 49-6-808. As the school's on-site instructional and operational leader, the Principal/Head of School will serve as the school's designated safety coordinator and will have direct responsibility for safety planning, implementation, training, and coordination with external partners.

Responsibilities of the School Safety Lead

The Principal/Head of School will be responsible for the following school safety functions:

- Developing, implementing, and annually updating the school's comprehensive school safety plan in accordance with state law;
- Coordinating with local law enforcement agencies, emergency management officials, and first responders;

- Ensuring all required safety drills, trainings, and reporting requirements are conducted, documented, and reviewed;
- Overseeing threat assessment procedures, emergency response protocols, and internal and external communication systems;
- Ensuring staff receive required training related to school safety, emergency response, and student supervision;
- Monitoring compliance with all statutory requirements and submitting required documentation to the authorizer and the Tennessee Department of Education.

Approach and Timeline for Safety Plan Development

Union Academy will develop and implement its school safety plan using a structured, phased approach aligned with statutory requirements:

- *Pre-Opening (6–12 months prior to opening):*
The Principal/Head of School will lead development of the comprehensive school safety plan, including emergency response procedures, threat assessment protocols, communication systems, and coordination with local law enforcement and emergency responders.
- *Pre-Opening (3–6 months prior to opening):*
The draft safety plan will be reviewed with the Governing Board, local emergency partners, and school leadership. Required revisions will be completed, and staff training and drill schedules will be finalized.
- *Prior to Opening:*
The finalized school safety plan will be formally adopted by the Governing Board, submitted as required, communicated to all staff, and incorporated into staff training. Required drills will be scheduled in accordance with state law.
- *Ongoing (Annually):*
The Principal/Head of School will ensure the safety plan is reviewed and updated at least annually, required drills are conducted throughout the school year, and documentation is maintained in compliance with state and authorizer requirements.

Insurance

State law requires that charter schools have appropriate insurance coverage. Types of insurance should include, at minimum, workers' compensation, employer liability, property, professional liability, surety bonds pursuant to T.C.A. § 49-13-111(n), and sexual abuse. If the proposed school intends to have school athletics, additional liability coverage will be required. Sponsors should check with their authorizer to determine the necessary coverage amounts.

50. Include, as Attachment 8, a letter of coverage from an insurance company that:

- **Lists the types and corresponding amounts of insurance coverage the proposed school will secure; and**
- **States that the company will provide the required coverage upon approval of the charter application; and**

- Includes provisions for assuring that the insurance provider will notify the Tennessee Department of Education within ten (10) days of the cancellation of any insurance it carries on the charter school, pursuant to T.C.A. § 49-13-107(b)(19).

Food Service

51. Describe the plan to offer food service to the students, including how a food service vendor will be selected or, in the alternative, how the proposed school will provide meals in-house, including food preparation, storage, service, and staffing.

The school will provide nutritious, high-quality meals to all students in compliance with Tennessee Department of Education nutrition standards and applicable federal regulations, including the National School Lunch Program (NSLP) guidelines. The school will implement a hybrid in-house model, utilizing the university's existing cafeteria facilities and staff to prepare and deliver meals daily, ensuring operational efficiency, cost-effectiveness, and high-quality service.

Food Preparation

- Meals will be prepared in the university's cafeteria kitchen, which meets all state and local health and safety regulations.
- The menu will be designed by the university's nutrition staff in collaboration with the school's leadership to meet NSLP standards and provide balanced options, including fruits, vegetables, whole grains, lean proteins, and vegetarian/health-conscious choices.
- Special dietary needs (e.g., allergies, religious restrictions, vegetarian or vegan diets) will be accommodated through a pre-order system coordinated between the school office and cafeteria staff.

Storage and Safety

- Prepared meals will be packaged and stored in temperature-controlled containers to maintain freshness and food safety during transport.
- The school will have designated refrigerated storage areas for meals upon delivery to maintain proper temperature until service.
- All storage and transport practices will comply with Tennessee Department of Health food safety regulations and federal guidelines.

Meal Delivery

- The university cafeteria staff will deliver meals to the school each morning in insulated containers to maintain proper temperature and quality.
- Meals will be delivered on a daily schedule coordinated with class schedules to ensure timely service.
- A designated receiving and staging area at the school will be used to manage deliveries efficiently and safely.

Meal Service at School

- Meals will be served in the school cafeteria or multipurpose dining area with adequate seating and supervision.
- Staff supervision will include both school staff and cafeteria team members to maintain order, assist younger students, and ensure a positive dining environment.
- Lunch periods will be scheduled to stagger groups for social distancing and efficient service, if needed.

Staffing and Operations

- Cafeteria Staff: Existing university cafeteria staff will prepare, package, and deliver meals.
- School Support Staff: School personnel will assist with meal distribution, supervision, cleanup, and documentation for meal counts.
- Training: All staff involved in handling and serving food will complete food safety and hygiene training as required by state and federal guidelines.

Vendor Selection / Partnership Considerations

- In this model, the university cafeteria serves as the in-house provider, eliminating the need for an external vendor selection process.
- Should the school need to contract with an outside vendor in the future, a competitive procurement process would be conducted per Tennessee charter school procurement regulations, including requests for proposals (RFPs) and evaluation criteria based on nutrition, cost, service quality, and alignment with the school's mission.

Oversight and Quality Assurance

- The school leadership team (Union Academy) will regularly review menus, student satisfaction, and nutrition compliance.
- Periodic audits and inspections will ensure food safety, freshness, and adherence to nutrition standards.

Start-up Plan

52. Provide a detailed timeline of key milestones and deadlines that the founding team must meet to open the proposed school on time. Include key areas such as hiring, student recruitment, and facilities acquisition and who is responsible for overseeing progress and completion.

The following timeline outlines the key milestones and responsibilities the founding team will complete to ensure Union Academy opens on time for the August 2027 school year. The timeline reflects a structured, phased approach to planning, staffing, student recruitment, facilities readiness, and operational compliance, with clear accountability assigned to the Governing Board, Principal/Head of School, and Union University as a service partner. This approach ensures coordinated implementation, ongoing oversight, and readiness across all academic, operational, and compliance areas prior to opening.

Present–December 2026: Planning and Pre-Launch Phase

Key Milestones

- Finalize charter approval and execute the charter contract
- Incorporate Union Academy as a separate nonprofit entity and submit an application for independent 501(c)(3) tax-exempt status
- Establish governing board committees, annual meeting calendar, and governance policies
- Begin facilities identification, site evaluation, and feasibility analysis
- Develop detailed operational plans (food service, transportation, safety, technology)
- Develop preliminary budget, staffing model, and compliance calendar
- Initiate coordination with Union University for business services, HR, payroll, and benefits systems
- Apply for federal or state charter school start-up grants
- Develop marketing and outreach plan to inform families and the community
- Develop student application and enrollment framework, including:
 - Open enrollment policies consistent with Tennessee charter law
 - Lottery procedures, timelines, and documentation requirements
 - Enrollment preference policies, if applicable and permitted by law
 - Student application forms (paper and electronic)
 - Procedures for waitlists, enrollment verification, and withdrawals

Oversight and Responsibility

Union University: Serves as the sole and controlling member of Union Academy’s nonprofit corporation, with exclusive authority to appoint members to Union Academy’s Governing Board

- Governing Board: Provides strategic oversight; approves enrollment, lottery, and governance policies
- Union University (CFO and administrative leadership): Leads facilities exploration, financial modeling, and coordination of shared services
- Governing Board (with Union University HR support): Recruits and interviews candidates for the Principal/Head of School position

January 2027: Leadership Hiring and Launch Preparation

Key Milestones

- Hire the Principal/Head of School and the Dean of Academics and Student Support Services
- Principal begins transition planning and launch preparation
- Narrow facility options and begin negotiations for lease or use agreement
- Finalize start-up operational contracts and service agreements
- Finalize student application materials and enrollment calendar for public release

Oversight and Responsibility

- Governing Board: Approves the Principal/Head of School hire and major facilities decisions
- Principal/Head of School: Begins academic planning, staffing strategy, and operational coordination

- Union University (CFO/Facilities): Supports facilities negotiations and due diligence

February–April 2027: Staffing and Academic Readiness

Key Milestones

- Interview and hire 14 classroom teachers, 1 physical education teacher, and 7 instructional staff
- Interview and hire key non-instructional support staff and Dean of Academics and Student Services
- Confirm special education and related service providers
- Order curriculum and instructional materials
- Develop the master schedule and staffing assignments
- Finalize compliance systems, data reporting structures, and student information systems
- Maintain ongoing communication with families and the community through digital and in-person outreach

Oversight and Responsibility

- Principal/Head of School: Leads instructional staffing, academic planning, scheduling, and readiness
- Union University HR: Supports hiring processes, onboarding logistics, and employment compliance
- Governing Board: Monitors progress toward staffing and academic readiness benchmarks

February–April 2027: Student Recruitment, Application, and Enrollment

Key Milestones

- Launch student recruitment and enrollment outreach
- Conduct public information sessions, open houses, and community meetings
- Open the student application window with clear communication of timelines and procedures
- Accept and process student applications
- Conduct a public lottery if applications exceed capacity
- Establish and maintain waitlists
- Notify families of acceptance, waitlist status, and next steps
- Finalize enrollment and secure student commitments

Oversight and Responsibility

- Principal/Head of School: Leads recruitment, family engagement, and information sessions
- Union University administrative support: Assists with application processing and recordkeeping as needed
- Governing Board: Receives enrollment updates and monitors progress toward enrollment targets

May–June 2027: Facilities, Operations, and Compliance

Key Milestones

- Finalize facility agreement

- Secure certificates of occupancy and complete safety inspections
- Install furniture, technology, and instructional equipment
- Finalize transportation plans, including IEP-related transportation
- Finalize food service, custodial, safety, and operational contracts
- Finalize and adopt the school safety plan
- Confirm enrolled students, finalize class rosters, and complete enrollment verification

Oversight and Responsibility

- *Principal/Head of School:* Oversees classroom readiness, instructional setup, and safety implementation
- *Union University (CFO/Facilities):* Supports facility readiness and inspections
- *Governing Board:* Approves major contracts and monitors compliance readiness

June–July 2027: Staff Onboarding and Final Preparation

Key Milestones

- Complete staff onboarding and orientation
- Conduct summer professional development and instructional training
- Finalize school policies, student and family handbooks, and emergency procedures
- Confirm compliance with Tennessee Department of Education reporting and accountability systems
- Conduct new family orientation sessions and school open house

Oversight and Responsibility

- *Principal/Head of School:* Leads professional development, culture-building, and family onboarding
- *Union University administrative services:* Supports systems readiness and reporting infrastructure
- *Governing Board:* Receives readiness updates and confirms opening benchmarks

July–August 2027: School Opening

Key Milestones

- New family orientation and student transition activities
- Final staff preparation and classroom setup
- First day of school (August 2027)
- Full implementation of academic, operational, and student support systems

Oversight and Responsibility

- *Principal/Head of School:* Manages daily school operations and instructional implementation
- *Governing Board:* Provides ongoing oversight through regular reporting and monitoring

Ongoing Oversight and Accountability

Throughout the planning and launch process, the Governing Board will monitor progress through regular reports, committee review, and milestone check-ins. The Principal/Head of School is responsible for executing the timeline, including staffing, enrollment, instructional readiness, and operational implementation, with accountability to the Governing Board to ensure the school opens on time and in full compliance with all requirements.

53. Describe contingency plans for common startup challenges including:

- **Not meeting enrollment targets;**
- **Not meeting fundraising goals;**
- **Hiring challenges; and**
- **Facility delays.**

Union Academy has developed proactive contingency plans to address common start-up challenges and ensure the school can open and operate successfully while maintaining academic quality, financial stability, and compliance.

Not Meeting Enrollment Targets

If enrollment projections are not met, the school will implement cost-containment strategies that align staffing and expenditures to actual enrollment levels. These strategies include:

- Phasing or delaying the hiring of non-essential positions;
- Adjusting class sections and staffing ratios to match confirmed enrollment;
- Prioritizing core instructional and compliance-related positions;
- Intensifying targeted student recruitment and outreach efforts;
- leveraging parent ambassadors and community partnerships;
- establishing more publicity on social media, radio, and news stations about this opportunity for families;
- adjusting the onboarding process for families to make it an easy application process;
- beginning a strong re-enrollment campaign for already established families to focus on retention;
- Utilizing waitlists and extended enrollment windows, as permitted by law.

The Governing Board and Principal will closely monitor enrollment trends and adjust the budget accordingly to ensure financial sustainability.

Not Meeting Fundraising or Grant Goals

Union Academy's operating budget is designed to rely primarily on per-pupil public funding, with fundraising and grant funds used to support start-up costs and program enhancements rather than core operations. If anticipated fundraising or grant revenue is not realized, the school may:

- Defer or scale non-essential start-up expenditures;
- Adjust implementation timelines for supplemental programs;
- Reallocate available reserves or contingency funds, as approved by the Governing Board;
- Create budgeted scenarios and plan accordingly just in case one occurs;
- Freeze or delay nonessential spending;
- Build or preserve cash reserves;
- Establish organizations such as a PTO that can help fundraise and cover varying costs;
- Identify flexible funding sources (grants, donations, short-term fundraising);
- Seek alternative funding opportunities, including additional grants or philanthropic support.

These measures ensure the school can continue operations without compromising instructional quality.

Hiring Challenges

In the event of hiring challenges, the school may:

- Leverage Union University's recruitment networks and HR infrastructure to expand candidate pipelines;
- Use phased hiring strategies aligned to enrollment confirmation;
- Utilize short-term contracted services or shared staffing models when appropriate;
- Prioritize hiring for instructional, student support, and compliance-critical roles;
- Communicate the guarantee of faculty/staff children attending the school;
- Communicate opportunities for extra income such as working the after school program;
- Clearly explain work hours and school schedule;
- Adjust class sizes as needed;
- Delay filling vacant positions until enrollment grows;
- Adjust onboarding timelines while maintaining quality standards.

This approach ensures continuity of operations and instructional delivery even if staffing timelines are extended.

Facility Delays

If facility acquisition or readiness is delayed, the school will:

- Implement temporary or phased facility solutions, including shared or alternative spaces, if necessary and permitted;
- Adjust opening timelines for non-essential spaces while prioritizing instructional areas;
- Work with local authorities to expedite inspections and approvals;
- Delay or phase enrollment growth if required to ensure student safety and compliance.

The Governing Board and Principal will closely oversee facility contingency planning to ensure the school opens in a safe, compliant, and functional environment.

Operations Capacity

54. Based on the team identified in Table 4, describe the sponsor's team's individual and collective qualifications for implementing the operational plan successfully. Identify any gaps in the sponsor's team and describe plans to fill those gaps with future hires. The discussion of both current team capacity and future hires should include a discussion of capacity in areas such as the following:

- **Professional development and performance management;**
- **Student health;**
- **School safety and security;**
- **School operations such as food service and transportation; and**
- **Facilities acquisition and management.**

The sponsor's operational plan will be implemented by a multidisciplinary team drawn from Union University with demonstrated expertise in educational leadership, performance management, finance, and organizational operations. Individually and collectively, this team brings the strategic, managerial, and compliance-focused capacity necessary to launch and

sustain high-quality school operations, while also recognizing targeted areas where additional operational staff and contracted services will be added prior to and during school opening.

Professional Development and Performance Management

The sponsor team includes multiple members with deep expertise in leadership development, educator preparation, and performance evaluation. Senior academic leadership and faculty in educational leadership and school administration provide strong capacity to design and implement professional development systems aligned to instructional priorities, educator effectiveness, and continuous improvement. This team has direct experience developing performance frameworks, supervising educators, and using data to support growth-oriented feedback and accountability. Collectively, the team is well-equipped to establish a coherent professional learning plan, staff evaluation systems, and performance monitoring processes during start-up and ongoing operations.

Student Health

While the sponsor team does not currently include a licensed health professional, team members bring strong institutional knowledge of student support systems, compliance requirements, and partnerships commonly used in school settings. The operational plan anticipates contracting with a qualified school nurse or health services provider to ensure compliance with state and local health requirements, medication administration protocols, and emergency health procedures. The sponsor will also establish referral relationships with local healthcare providers and community organizations to support student wellness needs beyond routine services.

School Safety and Security

The sponsor team includes senior leadership with experience in organizational risk management, policy development, and campus operations, providing a strong foundation for school safety planning. Team members are familiar with safety planning, emergency preparedness, and regulatory compliance within educational environments. To supplement this capacity, the school will develop a comprehensive safety plan in alignment with state requirements and will engage trained safety personnel or contract security services as needed. Additional expertise will be added through collaboration with local law enforcement and emergency management agencies to support drills, training, and ongoing risk assessment.

School Operations: Food Service and Transportation

The sponsor team brings strong operational and financial management capacity through members with expertise in business operations, budgeting, and organizational oversight. While the team does not include specialists in food service or transportation operations, the operational plan anticipates the use of contracted vendors to provide compliant, efficient services in both areas. The sponsor's financial and operational leadership will oversee vendor selection, contract management, budgeting, and performance monitoring to ensure services meet student needs, regulatory standards, and cost-effectiveness expectations.

Facilities Acquisition and Management

The sponsor team includes members with experience in financial planning, institutional operations, and facilities oversight within a higher education context. This collective experience provides a strong foundation for facility planning, lease negotiations, budgeting for maintenance, and long-term capital planning. The sponsor will supplement this expertise by engaging external professionals as needed, such as legal counsel, real estate advisors, and facilities management specialists, to support site selection, compliance, and ongoing maintenance. As the school grows, additional facilities management capacity may be added through dedicated staff or expanded service contracts.

Identified Gaps and Plans to Address Them

The sponsor team has intentionally focused its current capacity on leadership, academic oversight, finance, and performance management during the planning phase. Identified gaps include on-site student health services, day-to-day school safety personnel, food service and transportation operations, and specialized facilities management. These gaps will be addressed through a combination of targeted future hires and contracted services prior to school opening and as enrollment scales. This approach allows the sponsor to ensure high-quality, compliant services while maintaining operational flexibility and fiscal responsibility.

55. Explain how organizational health will be measured, including performance in pre-operations, during early years, and as an established organization. If the board determines a need to intervene regarding organizational performance, what form(s) would that take?

Union Academy will monitor and maintain organizational health through a comprehensive system of performance indicators, structured reporting, and continuous oversight across all phases of development—pre-operations, early years of operation, and as an established organization. Organizational health is defined as the school’s ability to execute its mission effectively, maintain stable operations, support high-quality instruction, comply with legal requirements, and sustain a positive school culture.

Pre-Operations Organizational Health

During the pre-opening phase, organizational health will be measured by the school’s ability to meet critical readiness benchmarks, including:

- Completion of governance structures, policies, and board committees;
- Timely hiring of key leadership positions;
- Progress toward facilities readiness and operational system setup;
- Development of compliant enrollment, safety, and operational plans;
- Adherence to the pre-opening timeline and charter requirements.

The Governing Board will monitor progress through milestone checklists, regular progress reports from the Principal, and committee-level reviews to ensure the school is fully prepared to open on time and in compliance.

Early Years of Operation (Years 1–3)

In the early years, organizational health will be assessed using both quantitative and qualitative indicators, including:

- Stability and effectiveness of school leadership and staff retention;
- Implementation fidelity of the instructional model and school culture;
- Compliance with charter requirements, state and federal laws, and reporting obligations;
- Effectiveness of operational systems, including enrollment, student services, and family communication;
- School climate indicators such as attendance, behavior data, and stakeholder feedback.

The board will receive regular reports on organizational performance and will use data dashboards, school leader updates, and site visits to monitor progress and identify areas for improvement.

Established Organization (Full Capacity)

As the school reaches full capacity, organizational health will be measured through:

- Long-term leadership stability and succession planning;
- Consistent execution of systems and procedures across grade levels;
- Sustained compliance with accountability, reporting, and governance requirements;
- Staff engagement and professional growth indicators;
- Positive trends in student attendance, retention, and family satisfaction.

Organizational performance data will inform strategic planning, continuous improvement efforts, and long-term sustainability decisions.

Board Intervention and Corrective Action

If the Governing Board determines that organizational performance is not meeting expectations, it may intervene through a range of graduated responses, including:

- Requiring a corrective action or improvement plan with clear goals, timelines, and accountability measures;
- Increasing the frequency of reporting, meetings, or site-based monitoring;
- Providing targeted support, coaching, or external technical assistance;
- Reassigning responsibilities or adjusting leadership structures, as appropriate;
- Exercising contractual authority related to leadership evaluation or staffing decisions, if necessary.

Budget and Finance

Operating Budget

56. Include, as Attachment 9, the completed budget using the [state's required template](#). At a minimum, the budget must include:

- **A month-by-month accounting of anticipated revenues and expenditures in Year 0 and revenues and expenditures for two scenarios (minimum and planned/anticipated) for years 1-5 of the school's operation.**
- **Anticipated budgetary assumptions for the following:**
 - **Student enrollment counts for years 1-5 of the school's operation;**
 - **Staff FTE counts for years 0-5 of the school's operation;**
 - **All anticipated funding sources, including state and local funding, secured grants, philanthropy, and fundraising; and**
 - **All relevant expenditures, expenses, and assumptions for each of the following expenditure/expense classification categories: salaries and benefits, contracted services, school operations, and facilities operations and maintenance.**

Budget Assumptions and Alignment to State Budget Template

Union Academy has completed Attachment 9 using the Tennessee Department of Education's required charter school budget template, including all required tabs and scenarios. The assumptions described below align directly with the structure, categories, and classifications contained within the state template and are reflected consistently across all budget worksheets.

Year 0 Start-Up Budget Assumptions

The **Year 0 Start-Up Budget** tab reflects a month-by-month accounting of anticipated pre-opening revenues and expenditures. Year 0 assumptions include pre-opening leadership staffing, planning and compliance costs, curriculum and instructional material purchases, professional development, and other start-up expenses necessary to prepare the school for opening.

Consistent with the template structure, Year 0 does not assume per-pupil state or local revenue and reflects only allowable pre-opening expenditures and anticipated start-up funding, if applicable. Any anticipated charter school program (CSP) start-up grant funding is identified separately and is not assumed unless awarded.

Student Enrollment Assumptions (Years 1–5)

Student enrollment projections are documented in both the **"Years 1–5 Student Counts – Minimum"** and **"Years 1–5 Student Counts – Planned"** tabs of the template. These tabs reflect two enrollment scenarios as required by the state:

- **A minimum enrollment scenario**, demonstrating the school's ability to operate sustainably at reduced enrollment levels; and
- **A planned enrollment scenario**, reflecting anticipated growth based on grade-level expansion and facility capacity.

Enrollment projections are consistent with the school's phased growth model and do not exceed the instructional capacity assumed in the staffing and budget worksheets.

Staffing FTE Assumptions (Years 0–5)

Staffing assumptions are documented in the “**Years 1–5 Staff Counts – Minimum**” and “**Years 1–5 Staff Counts – Planned**” tabs. Full-time equivalent (FTE) counts are aligned directly to enrollment levels and instructional design.

Year 0 staffing reflects pre-opening administrative and operational needs only. Years 1–5 staffing scales incrementally and includes instructional staff, instructional assistants, leadership positions, and required support roles. Staffing levels differ appropriately between the minimum and planned scenarios to demonstrate flexibility and fiscal responsibility under varying enrollment conditions.

Revenue Assumptions and Funding Sources

Revenue assumptions in the “**Years 1–5 Budget – Minimum**” and “**Years 1–5 Budget – Planned**” tabs reflect per-pupil funding generated through Average Daily Membership (ADM), including:

- State funding under the Tennessee Investment in Student Achievement (TISA) formula;
- Local funding generated through student enrollment; and
- Federal funding, as applicable.

Consistent with the financial narrative, the base operating budget does not rely on variable or uncommitted funding sources. Any anticipated charter school program (CSP) grants, philanthropic contributions, or fundraising revenue are clearly identified in the template and treated as supplemental rather than structural funding. At the time of application, no bank financing, loans, or long-term debt are assumed.

Expenditure Categories and Cost Assumptions

All expenditures in the template are organized according to the state-required classification categories, including:

- Salaries and benefits;
- Contracted services;
- School operations; and
- Facilities operations and maintenance.

Personnel costs reflect conservative salary assumptions and a consistent benefits load, as described in the financial narrative. Non-personnel expenditures are based on anticipated operational, contractual, and facility-related needs appropriate to the school’s size and stage of growth. Cost assumptions are applied consistently across both minimum and planned scenarios.

57. Provide a budget narrative that includes a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should:

- **Address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising);**

- Describe anticipated funding sources. Indicate the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which have been committed and which are anticipated;
- Describe the minimum student enrollment needed to open and operate in Year 1;
- Discuss the school's planned approach to teacher salaries over time, including whether the school plans to use a step-and-ladder pay schedule or offer annual raises;
- Describe the year 1 cash flow contingency, in the event that revenue projections are not met in advance of opening; and
- Explain the school's contingency plan to meet financial needs for any year the school projects to be operating at a budget deficit.

Budget Narrative and Financial Sustainability

Union Academy's budget is built on conservative revenue assumptions, enrollment-driven staffing, and prudent fiscal controls designed to ensure sustainability during start-up and long-term growth. The school's financial plan aligns staffing levels and expenditures directly to projected enrollment and Tennessee's public education funding framework while maintaining sufficient flexibility to respond to enrollment variability or unanticipated fiscal challenges.

Revenue Assumptions and Basis for Projections

Union Academy's primary source of operating revenue is per-pupil state, local, and federal funding generated through Average Daily Membership (ADM). Revenue projections are based on a conservative combined per-pupil allocation of \$10,771, consisting of \$7,343 in state funding under Tennessee's Investment in Student Achievement (TISA) formula, \$3,319 in local funding from Jackson-Madison County Schools (JMCSS), and \$109 in federal funding provided through the U.S. Department of Education.

In accordance with Tennessee law, Union Academy will receive 100 percent of state and local funds generated by enrolled students. While federal funding is included in the per-pupil calculation, the school's financial model does not rely on federal funds to support core instructional or operational obligations. Federal funds, if received, will be treated as supplemental and used to enhance student services, instructional supports, and targeted programming rather than fixed operating costs.

Enrollment Projections and Minimum Viable Enrollment

Union Academy projects measured enrollment growth, opening with 320 students in Year 1 and increasing annually as additional grade levels are added, reaching 780 students at full capacity. Enrollment projections reflect conservative assumptions based on facility capacity, staffing design, and anticipated local demand.

The financial model identifies a minimum viable enrollment of approximately 300 students in Year 1 as sufficient to open and operate sustainably. At this level, the school can maintain required leadership, instructional, and compliance staffing by adjusting the number of

instructional sections per grade while preserving core academic programming and student services.

Staffing Levels and Cost Assumptions

Staffing levels are directly aligned to enrollment and instructional design. Instructional staffing is based on one licensed teacher and one instructional assistant per two elementary classroom sections. Leadership, instructional support, and student services roles are phased in strategically to correspond with enrollment growth and increasing programmatic complexity.

The school will employ a Principal and a Dean of Academics and Student Support Services at opening to oversee instructional quality, academic interventions, discipline, and compliance with student services requirements. An Assistant Principal position will be added beginning in Year 3, when enrollment size and grade-level expansion warrant additional administrative capacity. Additional instructional support and leadership roles will be added incrementally in later years as the school expands into middle grades.

Salary assumptions reflect conservative averages for Tennessee charter schools and include an estimated 25 percent benefits load. Personnel expenditures are maintained within prudent industry benchmarks, averaging approximately 52–57 percent of total revenue across the projection period, allowing adequate resources for facilities, instructional materials, and operational expenses.

Teacher Compensation and Salary Growth

Union Academy plans to offer competitive teacher compensation aligned with regional market rates. The school does not utilize a traditional step-and-ladder salary schedule. Instead, Union Academy will implement an annual compensation review process that allows for incremental salary adjustments based on performance, years of service, and the overall financial health of the school. Cost-of-living adjustments may be considered as funding permits, with the goal of retaining high-quality educators while maintaining fiscal responsibility.

Variable Income, Grants, and Other Funding Sources

Union Academy's core operating budget does not rely on variable income sources such as grants, donations, or fundraising to meet essential instructional or operational expenses. At the time of application, the school does not have any committed funding from banks, lending institutions, corporations, or foundations and does not plan to incur long-term debt to support operations.

The school anticipates applying for available federal or state charter school program (CSP) start-up grants; however, such funding is anticipated but not committed and is therefore excluded from base operating revenue projections. If awarded, start-up grant funds will be used solely for allowable one-time expenses such as curriculum materials, instructional technology, professional development, and other start-up costs. Any philanthropic or grant funding received will be treated as supplemental and will not be required to sustain ongoing operations.

Year 1 Cash Flow Contingency

Recognizing that state and local funding is received on a reimbursement basis and may lag behind initial operating expenses, Union Academy has planned for Year 1 cash flow contingencies. These include conservative pre-opening hiring timelines, staggered staff start dates where appropriate, and maintaining sufficient cash reserves to cover initial payroll and operating expenses. Start-up grant funds, if awarded, may also be used to offset early cash flow pressures in accordance with grant requirements.

Contingency Planning for Budget Shortfalls

In the event that Union Academy experiences a budget deficit in any fiscal year, the school will implement a structured contingency plan focused on expenditure control rather than reductions to instructional quality. Potential measures include delaying non-essential hires, reducing instructional sections through natural attrition, scaling back discretionary spending, renegotiating vendor contracts, and utilizing available reserves. Required leadership, instructional, and compliance roles will be maintained to ensure continued adherence to legal, academic, and operational requirements.

Long-Term Financial Sustainability

Union Academy's multi-year financial projections demonstrate long-term fiscal sustainability through conservative revenue assumptions, enrollment-aligned staffing, disciplined personnel cost management, and limited reliance on variable funding sources. By phasing staffing strategically, maintaining clear contingency plans, and aligning expenditures to enrollment growth, the school is positioned to meet its financial obligations while delivering a high-quality educational program over time.

Budget and Finance Capacity

58. Describe the systems, policies, and processes the school will use for financial planning, accounting, purchasing, and payroll, including the method for conducting annual audits of the financial, administrative, and program operations of the school. Describe how the school will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements. Identify the role and key responsibilities of the individual who will be responsible for overseeing day-to-day financial management and system oversight.

Union Academy will implement robust systems, policies, and processes to ensure effective financial planning, accurate accounting, transparent purchasing, timely payroll, and full compliance with all state and federal financial requirements. These systems will be supported through coordination with Union University's established business services infrastructure and governed by board-approved financial policies.

Financial Planning and Budgeting

The school will engage in annual and multi-year financial planning aligned to enrollment projections and strategic priorities. Key practices include:

- Development of an annual operating budget and multi-year financial forecasts, reviewed and approved by the Governing Board;
- Budget-to-actual monitoring conducted monthly to ensure expenditures align with projections;
- Cash flow analysis and reserve planning to support operational stability;
- Adjustments to staffing and expenditures based on enrollment trends and revenue changes.

The Principal will lead financial planning in collaboration with Union University's finance team and will present financial reports and recommendations to the Governing Board through the board liaison.

Accounting Systems

Union Academy's accounting will be maintained using Union University's established financial systems, which follow generally accepted accounting principles (GAAP). Accounting practices will include:

- Accurate recording and classification of all revenues and expenditures;
- Monthly bank reconciliations and financial statement preparation;
- Segregation of duties to prevent errors or misuse of funds;
- Regular review of financial statements by school leadership and the Governing Board.

These systems provide consistency, reliability, and audit readiness.

Purchasing and Procurement

The school will follow board-approved purchasing policies designed to ensure transparency, fiscal responsibility, and compliance. Purchasing processes will include:

- Required pre-approval of expenditures;
- Competitive procurement practices consistent with state and federal requirements, including 2 CFR Part 200 for federal funds;
- Documentation of all purchases, contracts, and vendor agreements;
- Governing Board approval for major contracts and expenditures exceeding established thresholds.

Payroll and Human Resources

Payroll will be administered through Union University's HR and payroll systems, ensuring accuracy, timeliness, and compliance with employment laws. Processes include:

- Verification of employment authorization and compensation approval;
- Secure payroll processing and tax reporting;
- Accurate tracking of salaries, benefits, and leave;
- Compliance with all applicable wage, tax, and reporting requirements.

Annual Audits and Compliance

Union Academy will undergo an independent annual audit of its financial, administrative, and program operations conducted by a qualified external auditor in accordance with state requirements and generally accepted auditing standards. Audit results will be:

- Reviewed by the Governing Board;
- Submitted to the Tennessee Department of Education and other required entities;
- Used to inform corrective action plans, if necessary.

In addition, the school will comply with all required financial reporting, including state, federal, and grant-related reports.

Internal Controls and Compliance

Strong internal controls will be maintained through:

- Board-approved financial policies and procedures;
- Segregation of financial duties among budgeting, authorization, payment, and reconciliation;
- Regular monitoring and oversight by the Governing Board and its finance committee;
- Use of standardized financial systems and documented procedures;
- Ongoing compliance checks and corrective actions, as needed.

Day-to-Day Financial Management Oversight

The Principal will be responsible for day-to-day financial management and system oversight. Key responsibilities include:

- Overseeing budgeting, financial planning, and expenditure controls;
- Coordinating with Union University's finance and payroll departments;
- Preparing financial reports and dashboards for the Governing Board;
- Ensuring compliance with all financial reporting and audit requirements;
- Identifying financial risks and recommending corrective actions.

59. Describe the procedures governing the deposit of idle funds, purchasing procedures, and comprehensive travel regulations.

Union Academy will maintain strong fiscal controls and transparent financial practices to safeguard public funds and ensure compliance with applicable state and federal requirements. The school's financial procedures governing the deposit of idle funds, purchasing, and travel will be adopted by the Governing Board and implemented in coordination with Union University's business services.

Deposit of Idle Funds

All school funds will be deposited in federally insured financial institutions approved by the Governing Board and consistent with Tennessee law. Idle funds will be managed conservatively to preserve principal, maintain liquidity, and ensure accessibility for operational needs.

Permissible deposit and investment vehicles may include:

- FDIC-insured checking and savings accounts;
- Interest-bearing accounts or money market accounts backed by government securities;
- Other low-risk instruments permitted under Tennessee law and board policy.

The school will not engage in speculative investments. Cash balances will be monitored regularly, and deposits will be reconciled monthly as part of standard financial reporting and internal controls.

Purchasing Procedures

Union Academy will follow board-approved purchasing procedures designed to promote fiscal responsibility, transparency, and accountability. Purchasing protocols will include:

- Budgetary controls requiring that all purchases align with approved budgets;
- Segregation of duties among requisition, approval, purchasing, and payment functions;
- Required documentation for all expenditures, including purchase orders, contracts, and receipts;
- Competitive procurement practices consistent with state and federal requirements, including competitive quotes or bids for purchases exceeding established thresholds;
- Compliance with federal procurement requirements for any purchases made with federal funds.

All contracts and major expenditures will require appropriate administrative approval and, when applicable, Governing Board approval.

Travel Regulations

Comprehensive travel regulations will govern all school-related travel and reimbursement.

Travel policies will:

- Require pre-approval for all travel expenditures;
- Limit travel to activities directly related to the school's mission, operations, or professional development;
- Establish reimbursement rates consistent with board-approved limits and, when applicable, state or federal guidelines;
- Require original receipts and proper documentation for all reimbursements;
- Prohibit reimbursement for personal or non-essential expenses.

Travel expenditures will be monitored to ensure cost-effectiveness and alignment with the school's operational priorities.

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

Union Academy will contract for select operational and administrative services through Union University, the sponsoring institution, to ensure efficiency, compliance, and cost containment during start-up and ongoing operations. Leveraging the University's established infrastructure allows the school to focus resources on instruction and student support while maintaining strong financial and operational controls.

Business and Financial Services

Union University will provide business and financial management services, including budgeting support, accounts payable and receivable processing, financial reporting, and internal controls.

These services will ensure compliance with generally accepted accounting principles (GAAP) and applicable state and federal requirements.

Anticipated Costs:

Business and financial services will be provided under a services agreement at a cost that is competitive with market rates for comparable charter school business services. Costs are projected to range from 2–4 percent of annual operating expenditures, depending on enrollment and scope of services.

Selection Criteria:

Union University was selected based on demonstrated expertise in financial management, established internal controls, familiarity with public-sector accounting requirements, and the ability to provide services at a lower cost than outsourcing to multiple vendors.

Payroll and Human Resources Services

Union University will provide payroll processing and human resources support, including employee onboarding, benefits administration, payroll tax reporting, and compliance with state and federal employment laws. Utilizing the University's existing payroll systems ensures accuracy, timeliness, and compliance while reducing administrative burden on school leadership.

Anticipated Costs:

Payroll and human resources services will be provided through the University's existing systems and staff. Costs are expected to be embedded within the overall services agreement and remain below the cost of contracting with third-party payroll vendors.

Selection Criteria:

Selection is based on the University's established payroll infrastructure, experience administering employee benefits, and ability to ensure compliance with employment regulations while achieving economies of scale.

Auditing Services

Union Academy will engage an independent external auditor, selected in accordance with state procurement requirements, to conduct the annual financial audit. Union University will assist with coordination of the audit process, including preparation of financial statements and required documentation, but will not serve as the independent auditor.

Anticipated Costs:

Annual audit costs are projected at \$15,000–\$25,000, consistent with comparable charter school audits in Tennessee.

Selection Criteria:

Auditors will be selected through a competitive process based on experience auditing

charter schools or public entities, knowledge of Tennessee charter school finance requirements, demonstrated independence, and cost-effectiveness.

Technology and Administrative Support Services (If Applicable)

Union University may also provide shared services such as information technology support, data security, procurement assistance, and facilities-related administrative services as needed. These services will be governed by a written services agreement that clearly defines scope, costs, and accountability.

Anticipated Costs:

Costs for shared technology and administrative services will be negotiated annually and structured to ensure transparency and value.

Selection Criteria:

Services will be selected based on demonstrated capacity, cost efficiency, data security standards, and alignment with the school's operational needs.

Oversight and Accountability

All contracted services provided by Union University will be governed by written agreements approved by Union Academy's governing board. The board will regularly review service quality, costs, and performance to ensure that all contracted services support the school's mission, comply with charter requirements, and represent responsible stewardship of public funds.

61. Based on the team identified in Table 4, describe the sponsor's team's individual and collective qualifications for implementing the financial plan successfully. Identify any gaps in the sponsor's team and describe plans to fill those gaps with future hires. The discussion of both current team capacity and future hires should include a discussion of capacity in areas such as the following:

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

Union Academy will leverage the collective expertise of the faculty and staff of Union University, the Governing Board, and school leadership to implement and sustain the school's financial plan with fidelity. Union University brings deep institutional capacity in financial management, accounting, compliance, and internal controls, ensuring that public funds are managed responsibly and transparently.

Financial Management Capacity

Union University maintains an established finance and business services infrastructure with demonstrated experience managing complex, multi-million-dollar budgets, restricted funds, payroll, procurement, and compliance reporting. This infrastructure will support Union Academy through contracted services and oversight, providing:

- Budget development and monitoring support;
- Cash flow management and financial forecasting;

- Financial reporting consistent with generally accepted accounting principles (GAAP);
- Compliance with state, federal, and grant-related financial requirements.

At the school level, Principal will oversee day-to-day financial management, including budget execution, coordination with Union University's finance team, financial reporting to the Governing Board, and early identification of financial risks. This structure ensures strong financial leadership during the start-up and early operational phases.

Accounting and Internal Controls

Union University's accounting systems and internal control framework will be utilized to support the school, including:

- Segregation of duties across authorization, payment, reconciliation, and reporting functions;
- Monthly bank reconciliations and financial statement preparation;
- Board-approved purchasing and expenditure controls;
- Annual independent audits conducted by qualified external auditors.

The Governing Board, through its finance committee, will provide additional oversight by reviewing financial reports, audit findings, and corrective actions as needed.

Fundraising and Development Capacity

Union University brings institutional experience in fundraising, grant management, and donor relations that will support Union Academy's start-up and programmatic enhancement efforts. This includes experience with public and private grants, philanthropic giving, and stewardship practices.

The school's financial model is intentionally designed to rely primarily on per-pupil public funding for core operations, reducing dependence on variable fundraising revenue. Fundraising and grants will be used strategically to support start-up costs, innovation, and supplemental programming rather than ongoing operational expenses.

Identified Gaps and Plans to Address Them

As a start-up school, Union Academy recognizes that dedicated, school-specific capacity in fundraising and development may be limited in the initial phase. To address this:

- Union Academy will initially rely on Union University's development infrastructure for grant identification and application support;
- The school may engage short-term consultants to support charter school grant applications or targeted fundraising efforts, as needed;
- As the school grows and reaches financial stability, the Governing Board will assess the need for a dedicated development role or expanded fundraising capacity.

62. Explain how the proposed school's financial health will be monitored and measured, including performance in pre-operations, during early years, and as an established organization. If the board determines a need to intervene regarding financial performance, what form(s) would that take?

Union Academy will maintain strong financial health through a structured system of oversight, reporting, and internal controls that spans pre-operations, early years of operation, and full organizational maturity. Financial monitoring is designed to ensure fiscal sustainability, transparency, and compliance with all charter, state, and federal requirements.

Pre-Operations Financial Oversight

During the pre-opening phase, financial health will be monitored through:

- Board-approved start-up budgets and cash flow projections;
- Monthly financial reports reviewed by the Governing Board and its finance committee;
- Monitoring of grant funding, start-up expenditures, and facilities costs against approved budgets;
- Verification of enrollment projections and alignment of staffing expenditures to confirmed student enrollment;
- Coordination with Union University's finance and business services to ensure accurate accounting, payroll, and financial controls.

The Principal will be responsible for preparing financial reports and ensuring expenditures remain aligned to board-approved budgets, with oversight from the Governing Board.

Early Years of Operation (Years 1–3)

In the early operational years, financial performance will be monitored through:

- Monthly financial statements, including budget-to-actual comparisons, cash flow analysis, and reserve tracking;
- Quarterly financial reviews by the Governing Board and finance committee;
- Ongoing enrollment and revenue monitoring tied to Average Daily Membership (ADM);
- Annual independent audits conducted by a qualified external auditor;
- Compliance reviews related to grant funding, special education expenditures, and restricted funds.

Financial indicators used to assess health will include operating margins, cash reserves, personnel costs as a percentage of revenue, enrollment stability, and timely completion of required financial reports.

Established Organization (Full Capacity)

As the school reaches full capacity, financial monitoring will continue through:

- Multi-year financial forecasting aligned to enrollment trends;
- Maintenance of board-approved reserve targets;
- Continued independent annual audits and corrective action plans, if necessary;
- Regular review of long-term obligations, facilities costs, and contractual commitments.

Financial dashboards and performance indicators will be used to support strategic decision-making and long-term sustainability.

Board Intervention and Corrective Action

If the Governing Board determines that financial performance is at risk, intervention may include:

- Requiring corrective action plans with defined timelines and benchmarks;
- Increasing the frequency of financial reporting and oversight;
- Implementing spending controls, hiring freezes, or budget revisions;
- Engaging external financial consultants or auditors to assess financial risks;
- Revising enrollment, staffing, or operational assumptions;
- Exercising contractual authority related to leadership performance, if necessary.

Addendum G: Higher Education Institutions

Must be completed by higher education institutions seeking to open a charter school.

- 1. Describe the rationale for the institution opening and operating a charter school. How does operating a charter school align with the institution's core mission, strategic plan, and/or public service obligations?**

Union Academy is envisioned as a Christ-centered, academically rigorous public charter school designed to serve families in Jackson, Tennessee, and the surrounding communities who are seeking a high-quality, tuition-free public education grounded in Christian values. The school's mission—to provide Christ-centered education that promotes academic excellence, character development, and service to Church and society—directly aligns with the core mission and public service commitments of Union University.

Union University's rationale for opening and operating a charter school is rooted in its longstanding success and commitment to integrating faith, learning, and service in ways that strengthen individuals and communities. By establishing Union Academy as a public charter school, the university seeks to extend this mission into the K–12 public education space by offering families an additional high-quality option that emphasizes academic rigor, moral formation, and civic responsibility within a publicly accountable framework.

Operating a charter school also aligns with the university's strategic commitment to educational leadership and community engagement. Union Academy provides a vehicle through which the university can apply its expertise in teacher preparation, instructional leadership, and student development to meet local educational needs. The school is designed to cultivate intellectual growth and character formation in students, preparing them not only for postsecondary success but also for lives of service and leadership.

In addition, the charter school advances Union University's public service obligations by expanding educational choice and access for families seeking a values-informed learning environment without the barrier of tuition. Union Academy reflects the university's belief that faith-informed education and public accountability can coexist in service to the common good.

In sum, Union University's operation of Union Academy represents a mission-aligned extension of its educational and service commitments. The charter school allows the institution to contribute meaningfully to the public education landscape by fostering academic excellence, character development, and service-oriented leadership—benefiting students, families, and the broader community.

2. Explain how the governing board of the charter school will interact with the board of the institution. Describe the decision-making responsibilities, if any, that board of the institution will have over the charter school.

Union Academy will be governed by an independent, nonprofit governing board that holds full legal, fiduciary, and academic authority for the public charter school. While Union Academy benefits from a strategic partnership with Union University, the charter school governing board operates separately and independently from the university's board of trustees.

The governing board of Union Academy is solely responsible for all charter-related decision-making, including approval of academic programs, budgets, policies, school leadership, and compliance with state and federal law. The board focuses on governance, oversight, and accountability and does not delegate these responsibilities to the university's board.

Role of the Institution's Board

The board of trustees of Union University does not exercise decision-making authority over the charter school's academic program, operations, finances, or governance. Its role is limited to:

- Appointing a subset of trustees to serve on the charter school governing board through a formal, skills-based selection process;
- Approving and overseeing any arm's-length service agreements between Union University and Union Academy (e.g., shared services), solely in its capacity as a contracting party; and
- Ensuring that the university's involvement with the charter school complies with applicable legal, financial, and institutional policies.

Once appointed to the charter school governing board, trustees serve in a distinct fiduciary capacity on behalf of Union Academy and are bound by the charter school's bylaws, ethics policies, and conflict-of-interest requirements. They do not act on behalf of the university when making charter governance decisions.

Decision-Making Authority and Accountability

All decisions related to the charter school's mission, academic performance, staffing, finances, and compliance rest exclusively with the Union Academy governing board. The institution's board does not have veto power, approval authority, or supervisory control over charter school decisions.

3. Describe the internal structures at the institution that will oversee key elements of the charter school's operations (e.g., student information system, compliance requirements, school operations, transportation, food services, special populations staff, etc.).

While Union Academy is governed by an independent charter school governing board and led day to day by the Principal/Head of School, Union University will provide operational and

administrative support through established institutional structures. These supports are provided through formal service agreements and are designed to ensure efficiency, compliance, and continuity while preserving the charter school's autonomy over academic and governance decisions.

Business Services and Financial Operations

Union University's finance and business services offices will support key operational functions, including budgeting support, payroll processing, benefits administration, accounts payable, and financial reporting. These services ensure that Union Academy meets state and federal fiscal requirements, maintains strong internal controls, and aligns financial practices with generally accepted accounting standards. The charter school governing board retains authority over budget approval and financial decision-making, while the university provides execution and technical support.

Human Resources and Staffing Support

Union University will hire and employ school personnel and lease those employees to Union Academy through formal service agreements. The university's Human Resources Department will manage recruitment logistics, onboarding, licensure verification, background checks, payroll processing, and benefits administration for staff assigned to the charter school. This structure allows Union Academy to access a qualified, stable, and mission-aligned workforce while benefiting from the university's established HR systems and compliance infrastructure.

While Union University serves as the employer of record, the Union Academy governing board and the Principal/Head of School retain full authority over all school-based staffing decisions, including selection, assignment, supervision, evaluation, and, if necessary, recommendation for termination. School leadership directs day-to-day work, instructional expectations, and performance management, ensuring that staffing decisions remain aligned with the charter school's academic program, student needs, and accountability requirements.

Student Information Systems and Data Management

Union Academy will utilize a dedicated student information system (SIS) for attendance tracking, enrollment, grade reporting, and parent communication. Union University's information technology services will provide technical support, system integration assistance, and data security oversight to ensure FERPA compliance and system reliability. Academic data analysis and instructional use of data remain under the authority of school leadership at Union Academy.

Compliance and Reporting

Union University's compliance and regulatory support offices may assist Union Academy with state and federal reporting requirements, including student data submissions, special education documentation, and grant compliance, as applicable. This support helps ensure timely, accurate reporting while the charter school remains accountable to its authorizer and the Tennessee Department of Education.

Special Populations and Student Support Services

Union Academy will primarily serve students with disabilities and English Learner students through school-based staff. Union University will provide access to licensed professionals (e.g., school psychologists, related service providers) as needed to support evaluations, compliance, and service delivery requirements under IDEA, Section 504, and state law. Oversight of special populations programming and implementation remains the responsibility of school leadership.

Food Services, Transportation, and School Operations

Union University's auxiliary and operations units will support coordination of food services, transportation planning, facilities operations, and vendor contracting where applicable. These services will be structured through formal agreements to ensure health, safety, and regulatory compliance. Union Academy leadership retains responsibility for day-to-day operational oversight and service quality.

Information Technology and School Safety Systems

Union University's IT and campus safety departments will provide support related to network infrastructure, device management, cybersecurity, emergency communications, and safety planning coordination. Union Academy's Principal/Head of School is responsible for implementing the school safety plan and ensuring compliance with Tennessee school safety statutes, with institutional support as needed.

Oversight and Accountability

All institutional supports are provided in a service-provider capacity, not a governance role. The Union Academy governing board maintains full authority over academic outcomes, operational decisions, and compliance accountability. Formal service agreements define roles, responsibilities, performance expectations, and reporting structures to ensure transparency and maintain appropriate separation between the institution and the charter school.

4. Explain what, if any, institutional resources (e.g., facilities, technology, staff expertise, funding) will be allocated to the charter school and how students will access those resources.

During the initial start-up phase, Union University will not allocate physical facilities, instructional technology, or direct financial support to Union Academy. Institutional support will be limited to staff expertise and select contracted services, provided through formal service agreements and structured to preserve the charter school's independence and governance authority.

Union University will provide food services through its campus dining services, which will prepare and deliver meals for Union Academy students in compliance with applicable federal and state nutrition, health, and safety requirements. Students will access these services directly through the charter school's daily meal program.

In addition, Union University's student services and health services staff will provide nursing and health-related support to Union Academy through a contracted services arrangement. These services will support student health needs, medication administration, and required health documentation, while the Principal/Head of School retains responsibility for school-level health policies and compliance.

Beyond these direct services, Union University will provide professional staff expertise in areas such as finance, human resources, compliance, and operational planning. This expertise will be provided through consultation, technical assistance, and formal service agreements to support start-up readiness and compliance. Students will benefit indirectly through well-designed systems and reliable service delivery implemented by Union Academy's leadership and staff.

All institutional resources are provided in a service-provider capacity and do not confer governance authority, control over academic programming, or decision-making power to the university. The Union Academy governing board retains full authority over academic, operational, and fiscal decisions, ensuring compliance with Tennessee charter school requirements and preservation of the school's autonomy.

5. Explain what, if any, direct academic integration (e.g., dual enrollment, early college credit) will exist between the charter school and higher education institution and be available to students.

Union Academy plans to offer dual enrollment opportunities in partnership with Union University once students reach eligible high school grade levels and meet all academic readiness and eligibility requirements. Dual enrollment coursework will provide students with the opportunity to earn college credit while enrolled in high school and will be aligned with Tennessee Academic Standards, state dual enrollment policies, and applicable higher education requirements.

During the initial start-up and early implementation phases, Union Academy's academic program will operate independently to establish a strong instructional foundation, coherent curriculum, and effective school culture. As the school expands into high school grades, dual enrollment will be implemented in a phased and intentional manner, beginning with courses that support college- and career-readiness goals and are appropriate for secondary students.

All dual enrollment offerings will be:

- Approved by the Union Academy governing board;
- Delivered in compliance with Tennessee Department of Education and Tennessee Higher Education Commission requirements;
- Supported by qualified instructors who meet credentialing standards;
- Scheduled to align with the charter school's instructional model and graduation requirements; and

- Accessible to eligible students based on academic readiness and interest.

Formal agreements will define roles, responsibilities, credit transfer policies, and accountability measures to ensure that dual enrollment enhances student outcomes without compromising the charter school's autonomy or instructional coherence.

Supporting Educational Partnership and Institutional Benefits

Union Academy and Union University anticipate a mutually beneficial partnership that advances high-quality K–12 education while supporting educator preparation and academic research, with student learning as the primary priority. Union University's participation will occur only through structured, board-approved activities aligned with the school's mission and instructional priorities.

Union Academy may serve as a site for field experiences, clinical observations, internships, and student teaching placements for Union University's undergraduate and graduate education candidates. These experiences will be carefully supervised, coordinated with the Principal/Head of School, and designed to support classroom instruction while complying with Tennessee educator preparation requirements.

Union University doctoral candidates may also seek opportunities to conduct research related to student achievement, instructional effectiveness, or school improvement. Any research conducted at Union Academy will require governing board approval, Institutional Review Board (IRB) approval, and full compliance with FERPA and ethical research standards. Participation in research activities will be voluntary and will not interfere with instructional time or student services.

Union Academy may additionally serve as a supervised internship site for Union University students in related fields such as social work, counseling, or student services, where appropriate. All such partnerships will operate under formal agreements and remain subject to school leadership oversight.

6. Detail how the institution will manage potential conflicts of interest between its higher education operations and the charter school, particularly in areas such as contracting, employment, and shared services.

Union Academy and Union University will manage potential conflicts of interest through clear structural separation, formal policies, and transparent contracting practices. These safeguards ensure that the charter school operates independently and that all decisions are made in the best interests of students and the public.

Governance Separation and Fiduciary Duties

Union Academy is governed by an independent nonprofit governing board that holds full legal, fiduciary, and academic authority for the charter school. While a subset of Union University

trustees may serve on the charter school governing board, they do so in a distinct fiduciary capacity and are bound by Union Academy's bylaws, ethics policies, and conflict-of-interest requirements. Board members are required to disclose potential conflicts annually and recuse themselves from any deliberation or vote where a conflict exists. The university's board of trustees does not exercise decision-making authority over the charter school.

Contracting and Shared Services

Any contracts or shared service arrangements between Union Academy and Union University (e.g., human resources support, food services, health services, or professional expertise) will be established through arm's-length agreements that clearly define scope of services, pricing, performance expectations, and termination provisions. Contracts will be reviewed and approved by the Union Academy governing board, and any board member with a potential conflict will recuse from the decision. Services will be priced comparably to market rates and documented to ensure transparency and compliance.

Employment Practices

Union University will hire and employ staff and lease those employees to Union Academy through formal agreements. Union Academy's governing board and Principal/Head of School will retain authority over selection, assignment, supervision, evaluation, and recommendations regarding continued employment.

Financial Controls and Oversight

Financial transactions between the charter school and the university will be tracked separately, with clear accounting, reporting, and audit procedures. Union Academy will maintain independent financial oversight and comply with all state and federal reporting requirements. Regular reviews will ensure that shared services do not create undue influence or preferential treatment.

Ongoing Monitoring and Enforcement

The governing board's governance or audit committee will monitor compliance with conflict-of-interest policies, review related-party transactions, and ensure corrective action when necessary. These controls ensure transparency, accountability, and adherence to Tennessee charter school requirements.

Together, these measures provide a comprehensive framework for identifying, managing, and mitigating potential conflicts of interest while allowing Union Academy to benefit from institutional expertise without compromising independence, public accountability, or student outcomes.

- 7. If the sponsor plans to locate the charter school on the institution campus, detail the plan to integrate the charter school with the university while maintaining the safety and security of the students. *Sponsors may mark N/A if they do not plan to locate the charter school on the institution campus.***

Union Academy does not plan to locate the charter school on the Union University campus during the initial start-up or early years of operation. The school will initially operate at an off-campus facility that is designed exclusively for K–12 students and meets all applicable safety, accessibility, and operational requirements.

As the school becomes established and reaches operational maturity, Union Academy may explore the possibility of relocating to or constructing a dedicated facility on Union University's campus for long-term operation. Any future on-campus location would be carefully planned to ensure a clear separation between K–12 and higher education environments while preserving a safe, secure, and developmentally appropriate setting for students.

If the school is ultimately located on the university campus, integration would be guided by the following principles:

- *Dedicated Facilities and Controlled Access:* Union Academy would occupy a clearly defined, self-contained facility with controlled entry points, secure perimeters, and restricted access separate from general university spaces.
- *Independent Safety and Operations:* The charter school would maintain its own safety plan, emergency procedures, visitor management protocols, and supervision systems, consistent with Tennessee school safety requirements.
- *Age-Appropriate Separation:* Movement between charter school and university spaces would be limited to supervised, purpose-specific activities (e.g., approved academic or student support programs) and only for eligible students.
- *Coordination with Campus Safety:* Union Academy would coordinate with Union University's campus safety and emergency management teams to ensure aligned response protocols, communication systems, and compliance with local first responder expectations.
- *Governing Board Oversight:* Any decision to locate the school on campus would require governing board approval and would be implemented through formal agreements defining roles, responsibilities, and safety protocols.

Statement of Assistance

This document utilized AI-assisted drafting tools (ChatGPT, OpenAI) to support language development and organization. Final content decisions, verification, and revisions were completed by the applicant.

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Attachments

Attachment 1: Evidence of Community Engagement

Formal community engagement evidence is limited at this stage of the process. The sponsor's consideration of this application was initiated at the request of the Jackson-Madison County Schools, who asked the institution to explore and submit an application. Additionally, Union University has been an integral part of the Jackson community since its founding in 1823. For more than two centuries, the University has served students and built a legacy of educational excellence and community engagement.

Attachment 2: School-based Team Resumes

The school-based leadership team has not yet been finalized; however, Union is actively considering highly qualified candidates for key roles. Due to the confidential nature of the hiring process, individual candidates cannot be identified at this time. Union has established a clear hiring timeline that will guide the selection of the principal, Dean of Academics and Support Services, teachers, and additional support staff to ensure appropriate staffing well in advance of the school's opening. The resumes of the members of the governing board can be found on page 106-108 of this application.

Attachment 3: Board Member Resumes

Trustee Biographical Information

Mr. Jeff Perkins

Education

Union University – Bachelor of Arts in Management/Marketing (1989)

Employment

Vice President and Chief Operating Officer of Akin & Porter Produce Inc. in Greenfield, Tennessee (Retired)

Worship Leader for Bethel Baptist Church in Greenfield, Tennessee

Community Involvement

Bank3 in Memphis, Tennessee – Board of Directors

Weakley County Baptist Association Leadership Team

Served on the Weakley County School Board for 14 years

Mr. Joshua Dougan**Education**

Union University – Bachelor of Arts in Political Science (2006)

University of Tennessee College of Law – Juris Doctor (2009)

Employment

Attorney – The Dougan Law Firm, PLLC

Director of Worship and Music for First Baptist Church in Jackson, Tennessee

Former Assistant District Attorney General (26th Judicial District of Tennessee)

Community Involvement

Secretary, Young Lawyers Division – Tennessee Bar Association

Mrs. Kay Griffin

Education

Union University – Bachelor of Arts in English (1972)

Union University – Master of Arts in Education (2010)

Employment

High School English Teacher – Jackson-Madison County School System (Retired)

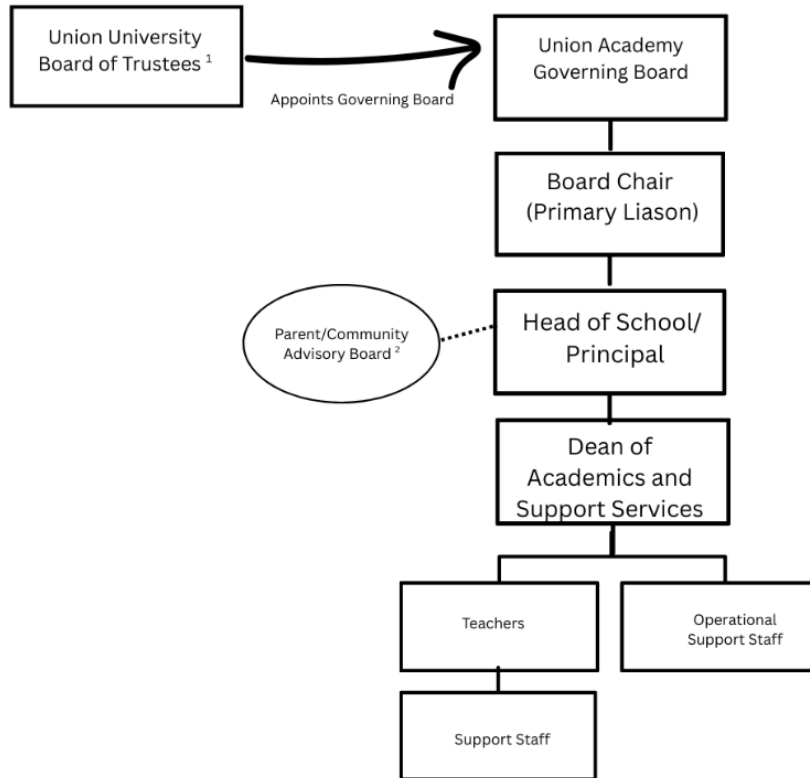
Community Involvement

ARISE2Read – Reading Coach

Bible Study Leader at West Jackson Baptist Church

Attachment 4: Organization Chart

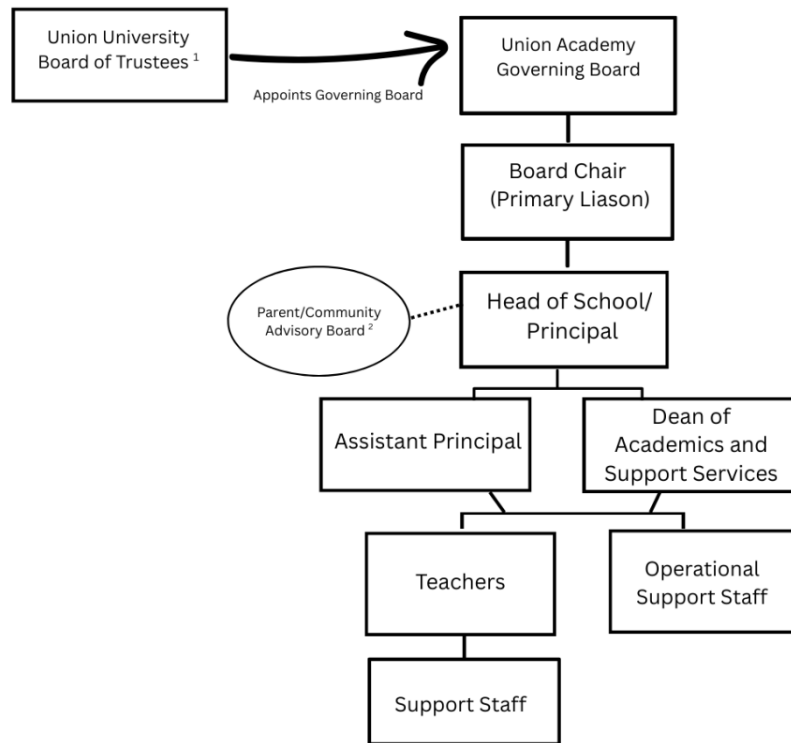
Year 1 Organizational Chart for Union Academy



¹ Union University serves as the sole and controlling member of Union Academy.

² Parent and Community Advisory Council provides stakeholder input but have no governance or decision-making authority

Full Capacity Organizational Chart for Union Academy



¹ Union University serves as the sole and controlling member of Union Academy.

² Parent and Community Advisory Council provides stakeholder input but have no governance or decision-making authority

Attachment 5: Articles of Incorporation

The application includes the Articles of Incorporation for Union University, which will serve as the sole and controlling member of Union Academy and will retain exclusive authority to appoint members of Union Academy's Governing Board. Union Academy is in the process of being incorporated as a separate nonprofit subsidiary, and its Articles of Incorporation will be finalized following charter approval. Upon completion, the sponsor will supplement this application with the executed incorporation documents for the Union Academy entity.

**Amended and Restated Charter
of
Union University**

Corporate Control No.
000086213

Pursuant to the provisions of the Tennessee Nonprofit Corporation Act (hereinafter, "the Act"), the undersigned corporation hereby submits its Amended and Restated Charter, amending its present charter by deleting it in its entirety and substituting this Amended and Restated Charter in its stead. This Amended and Restated Charter supercedes the corporation's original charter and all prior amendments thereto.

1. The name of the corporation is Union University.
2. The corporation is not for profit.
3. The corporation is a public benefit corporation.
4. The corporation is a religious corporation.
5. The duration of the corporation is perpetual.
6. The corporation will not have Members.
7. The street and mailing address of the corporation's registered office and its principal office is 1050 Union University Drive, Jackson, Tennessee 38305-3656. This office is located in Madison County. The name of the corporation's registered agent at that office is Samuel W. Oliver.
8. The corporation's fiscal year shall conclude July 31.
9. The corporation is organized exclusively for charitable, religious, and educational purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax

code. No part of the net earnings of the corporation shall inure 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 herein. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of this charter, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code. Upon the dissolution of the corporation, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such asset not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purposes.

10. All corporate powers shall be exercised by or under the authority of, and the affairs of the corporation managed under the direction of, its board of directors which shall be known as its board of trustees. Those persons constituting the board of trustees shall be not fewer than eighteen nor more than thirty-six in number, and shall be elected by the Tennessee Baptist Convention.

11. No person who is or was a director of the Corporation, nor such person's heirs, executors or administrators, shall be personally liable to the corporation for monetary damages for breach of fiduciary duty as a director; provided, however, that this provision shall not eliminate or limit the liability of any such person: (a) for any breach of a director's duty of loyalty to the corporation; (b) for acts or omissions not in good faith or which involve intentional misconduct or a knowing

violation of law; or (c) under T.C.A. §48-58-302, as amended from time to time.

12. With respect to claims or liabilities arising out of service as a director of the corporation, the corporation shall indemnify and advance expenses to each present and future director (and his or her estate, heirs, and personal representatives) to the fullest extent allowed by the laws of the State of Tennessee, both as now in effect and as hereafter adopted or amended.

13. One or more directors of the corporation may be removed only for cause after the director proposed for removal has been given notice and an opportunity to be heard. Cause for removal includes but is not limited to breach of fiduciary duty, immoral or criminal conduct, incompetence, and failure to discharge the duties of a director.

Certificate
Required by T.C.A. §48-60-106(h)

The restatement contains amendments to the charter. The restatement and the amendments contained therein were adopted by the board of directors. No amendment required the approval of members, the corporation having no members, and no amendment required the approval of any person other than the board.

Duly adopted
date - 11 - day of *September* 2015.

By: *Samuel W. Oliver*
Samuel W. Oliver, President

Attachment 6: Proof of Nonprofit and Tax-Exempt Status

The application includes proof of nonprofit and tax-exempt status for Union University, which will serve as the sole and controlling member of Union Academy and will retain exclusive authority to appoint members of Union Academy's Governing Board. Union Academy is in the process of being incorporated as a separate nonprofit subsidiary, and its nonprofit status will be finalized following charter approval. Upon completion, the sponsor will supplement this application with the executed incorporation documents for the Union Academy entity.

Internal Revenue Service

Department of the Treasury

District
Director

Baltimore District

31 Hopkins Plaza, Baltimore, Md. 21221

P.O. Box 13163
Baltimore, MD 21203

Date: FEBRUARY 25, 1998

Employer Identification Number:
62-0516509

UNION UNIVERSITY
1050 UNION UNIVERSITY DRIVE
JACKSON, TN 38305

Person to Contact:
EP/ED Tax Examiner

Telephone Number:
(410) 962-6058

Dear Sir/Madam:

This is in response to your inquiry, requesting a copy of the letter which granted tax exempt status to the above named organization.

Our records show that the organization was granted exemption from Federal Income Tax under section 501(c)(3) of the Internal Revenue Code effective MARCH, 1968.

We have also determined that the organization is not a private foundation because it is described in section(s) 509(a)(1) and 170(b)(1)(A)(ii).

Donors may deduct contributions to you under section 170 of the Code.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during the calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

You are required to file Form 990, Return of Organization Exempt from Income Tax, only if your gross receipts each year are normally more than \$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

A copy of our letter certifying the status of the organization is not available, however, this letter may be used to verify your tax-exempt status.

Because this letter could help resolve any questions about your exempt status, it should be kept in your permanent records.

Sincerely yours,



Paul M. Harrington
District Director

Attachment 7- Governing Board Bylaws of Union University

The application includes the bylaws for Union University, which will serve as the sole and controlling member of Union Academy and will retain exclusive authority to appoint members of Union Academy's Governing Board. Union Academy is in the process of being incorporated as a separate nonprofit subsidiary, and its governing bylaws will be finalized following charter approval. Upon completion, the sponsor will supplement this application with the executed incorporation documents for the Union Academy entity.

1. Mission, Identity, Vision, and Statement of Faith.

1.1. Mission. Within the statement of purpose contained in the charter, the mission of Union University is as follows: Union University provides Christ-centered education that promotes excellence and character development in service to Church and society.

1.2. Identity. Union University is an academic community, affiliated with the Tennessee Baptist Convention, equipping persons to think Christianly and serve faithfully in ways consistent with its core values of being excellence-driven, Christ-centered, people-focused, and future-directed. These values shape its identity as an institution which prioritizes liberal arts based undergraduate education enhanced by professional and graduate programs. The academic community is composed of quality faculty, staff, and students working together in a caring, grace-filled environment conducive to the development of character, servant leadership, and cultural engagement.

1.3. Vision. To impact the region, the country, and the world through Christ-centered higher education.

1.4. Statement of Faith.

1.4.1. The Scriptures. The Scriptures of the Old and New Testament were given by inspiration of God, and are the only sufficient, certain, and authoritative rule of all saving knowledge, faith, and obedience.

Numbers 23:19; Deuteronomy 4:1-2; 17:18-19; Joshua 1:7-8; 8:34; Psalms 19:7-10; 119:11, 89, 105, 140, 151, 160; Isaiah 34:16; 40:8; Jeremiah 15:16; 36:1-32; Matthew 5:17-18; 22:29; Luke 21:33; 24:44-46; John 5:39; 6:63, 68; 16:13-15; 17:17; Acts 17:11; Romans 15:4; 16:25-26; 2 Timothy 3:15-17; Hebrews 1:1-2; 4:12; 1 Peter 1:23-25; 2 Peter 1:19-21

1.4.2. God. There is but one God, the Maker, Preserver, and Ruler of all things, having in and of Himself, all perfections, being infinite in them all; and to Him all creatures owe the highest love, reverence, and obedience. He exists eternally in three persons: Father, Son, and Holy Spirit each with distinct personal attributes, but without division of nature,

essence, or being. God as Father reigns with providential care over all things that come to pass, and perpetually upholds, directs, and governs all creatures and all events; yet so as not to destroy the free will and responsibility of intelligent creatures.

Genesis 1:1; 2:7; 17:1; Exodus 3:14; 6:2-3; 15:11-13; 20:1-17; 34:6-7; Leviticus 22:2; Deuteronomy 4:15; 6:4; 32:6; 1 Kings 8:27; 1 Chronicles 29:10; Nehemiah 9:32-33; Job 11:7; 26:14; Psalm 19:1-3; 90:1-2; 145:3; Proverbs 16:4; Isaiah 43:3, 15; 64:8; Jeremiah 10:10; 17:13; 23:23-24; Malachi 3:6; Matthew 6:9-13; 7:11; 23:9; 28:19-20; Mark 1:9-11; John 4:24; 5:26; 14:6-13; 17:1-8; Acts 1:7; 14:11, 15; Romans 8:14-15; 11:36; 1 Corinthians 8:4-6; Galatians 4:4-6; Ephesians 1:11-12; 4:4-6; Colossians 1:15; 1 Thessalonians 1:9; 1 Timothy 1:17; Hebrews 11:6; 12:9; James 1:17; 1 Peter 1:17; 1 John 4:8, 16; 5:7; Revelation 4:8

1.4.3. Jesus Christ. The second person of the Trinity is the eternal Son of God. In his incarnation Jesus Christ was conceived by the Holy Spirit and born of the virgin Mary. Jesus perfectly revealed and did the will of God, taking upon Himself human nature, yet without sin. He honored the divine law by His personal obedience, and by His substitutionary death on the cross He made provision for our redemption from sin. He was buried and rose again the third day, and ascended to His Father, at whose right hand He lives to make intercession for His people. He is the only Mediator, the Prophet, Priest, and King of the Church, and Sovereign of the universe.

Psalms 2; 110; Isaiah 7:14; Isaiah 53:1-12; Matthew 1:18-23; 3:17; 8:29; 11:27; 14:33; 16:16, 27; 17:5; 27; 28:1-6, 19; Mark 1:1; 3:11; Luke 1:35; 4:41; 22:70; 24:46; John 1:1-18, 29; 10:30, 38; 11:25-27; 12:44-50; 14:7-11; 16:15-16, 28; 17:1-5, 21-22; 20:1-20, 28; Acts 1:9; 2:22-24; 7:55-56; 9:4-5, 20; Romans 1:3-4; 3:23-26; 5:6-21; 8:1-3, 34; 10:4; 1 Corinthians 1:30; 2:2; 8:6; 15:1-8, 24-28; 2 Corinthians 5:19-21; 8:9; Galatians 4:4-5; Ephesians 1:20; 3:11; 4:7-10; Philippians 2:5-11; Colossians 1:13-22; 2:9; 1 Thessalonians 4:14-18; 1 Timothy 2:5-6; 3:16; Titus 2:13-14; Hebrews 1:1-3; 4:14-15; 7:14-28; 9:12-15, 24-28; 12:2; 13:8; 1 Peter 2:21-25; 3:22; 1 John 1:7-9; 3:2; 4:14-15; 5:9; 2 John 7-9; Revelation 1:13-16; 5:9-14; 12:10-11; 13:8; 19:16

1.4.4. Holy Spirit. The Holy Spirit is the Spirit of God, fully divine, who exalts Jesus Christ. The Spirit convicts men and women of sin, of righteousness, and judgment, enabling them to understand the truth. He calls men and women to the Savior, and brings about regeneration, which is a renewal of heart and nature.

Genesis 1:2; Psalms 51:11; 139:7-12; Isaiah 61:1-3; Joel 2:28-32; Matthew 1:18; 3:16; 12:28-32; 28:19; Mark 1:10, 12; Luke 1:35; 4:1, 18-19; 11:13; 12:12; John 4:24; 14:16-17, 26; 15:26; 16:7-14; Acts 1:8; 2:1-4, 38; 4:31; 5:3; 6:3; 7:55; 8:17, 39; 10:44; 13:2; 15:28; 16:6; 19:1-6; Romans 8:9-11, 14-16, 26-27; 1 Corinthians 2:10-14; 3:16; 12:3-11, 13; Galatians 4:6; Ephesians 1:13-14; 4:30; 5:18; 1 Thessalonians 5:19; 1 Timothy 3:16; 4:1; 2 Timothy 1:14; 3:16; Hebrews 9:8, 14; 2 Peter 1:21; 1 John 4:13; 5:6-7; Revelation 1:10; 22:17

1.4.5. Humankind. God originally created humankind in His image, and free from sin; but through the temptation of Satan, they transgressed the command of God, and fell from their original righteousness, whereby all humans have inherited a sinful nature that is opposed to God, and are thus under condemnation. As soon as they are capable of moral action, they become actual transgressors. God created only two genders and He fashioned each one of us as either male or female. Sexual relationships are designed by God to be expressed solely within a marriage between a man and a woman.

Genesis 1:26-30; 2:5, 7, 15-25; 3; 9:6; Psalms 1; 8:3-6; 32:1-5; 51:5; Isaiah 6:5; Jeremiah 17:5; Matthew 5:27-29; 16:26; 19:3-12; Acts 17:26-31; Romans 1:18-32; 3:10-18, 23; 5:6, 12, 19; 6:6; 7:14-25; 8:14-18, 29; 1 Corinthians 1:21-31; 6:9-10; 7:1-16; 15:19, 21-22; Galatians 5:19; Ephesians 2:1-22; 5:1-5; Colossians 1:21-22; 3:9-11; Hebrews 13:4

1.4.6. Salvation. Salvation involves the redemption of the whole person, and is offered freely to all who believe in Jesus Christ as Lord and Savior; accepting and trusting in Him alone for justification and eternal life. Justification is God's gracious declaration of righteousness of sinners, who believe in Christ, from all sin, through the satisfaction that Christ has made. Believers are also sanctified by God's Word and Spirit dwelling in them. Sanctification is the process of progressing toward moral and spiritual maturity, enabled by the presence and power of the Holy Spirit. Those who are accepted in Christ and sanctified by the Holy Spirit will never totally nor finally fall away from the state of grace, but shall persevere to the end, and be kept by the power of God through faith unto salvation.

Genesis 3:15; Exodus 3:14-17; 6:2-8; Matthew 1:21; 4:17; 16:21-26; 27:22-28:6; Mark 10:45; Luke 1:68-69; 2:28-32; John 1:11-14, 29; 3:3-21, 36; 5:24; 10:9, 28-29; 15:1-16; 17:17; Acts 2:21; 4:12; 15:11; 16:30-31; 17:30-31; 20:28, 32; Romans 1:16-18; 2:4; 3:23-25; 4:3-8; 5:8-10; 6:1-23; 8:1-18, 29-39; 10:9-10, 13; 13:11-14; 1 Corinthians 1:18, 30; 6:19-20; 15:10; 2 Corinthians 5:17-20; Galatians 2:20; 3:13-14; 5:22-25; 6:15; Ephesians 1:7; 2:1-22; 4:11-16; Philippians 2:12-13; Colossians 1:9-22; 3:1-17; 1 Thessalonians 5:23-24; 2 Timothy 1:12; Titus 2:11-14; 3:3-7; Hebrews 2:1-3; 5:8-9; 9:24-28; 11:1-3; 12:1-8, 14; James 2:14-26; 1 Peter 1:2-23; 1 John 1:6-2:2; Revelation 3:20; 21:1-22:5

1.4.7. The Church. The Lord Jesus Christ is the Head of the Church, which is composed of all true followers of Christ, and in Him is invested supremely all power for its government. Christians are to associate themselves with local churches; and to each church is given the authority to administer order, to carry out ministry, to worship, and to practice discipline.

Matthew 16:15-19; 18:15-20; Acts 2:41-42, 47; 5:11-14; 6:1-6; 13:1-3; 14:23, 27; 15:1-30; 16:5; 20:28; Romans 1:7; 1 Corinthians 1:2; 3:16; 5:4-5; 7:17; 9:13-14; 12; Ephesians 1:22-23; 2:19-22; 3:8-11, 21; 4:11-16; 5:22-32; Philippians 1:1; Colossians

1:18; 1 Timothy 3:1-15; 4:14; Hebrews 3:12-13; 11:39-40; 1 Peter 5:1-4; Revelation 2-3; 21:2-3

1.4.8. Last Things. The bodies of humans after death return to dust, but their spirits return immediately to God—the righteous to rest with Him; the wicked to be reserved under darkness to the judgment. God in His own time and in His own way, will bring the world to its appropriate end. According to His promise, Jesus Christ will return personally and visibly in glory to the earth. At the last day, the bodies of all the dead, both just and unjust, will be raised. God has appointed a day, when He will judge the world by Jesus Christ, when all people shall receive according to their deeds; the wicked shall go into everlasting punishment; the righteous, into everlasting life.

Matthew 16:27; 18:8-9; 19:28-30; 24:27, 30, 36, 44; 25:31-46; 26:64; Mark 8:38; 9:43-48; Luke 12:40, 48; 16:19-26; 17:22-37; 21:27-28; John 14:1-3; Acts 1:11; 17:31; Romans 14:10-12; 1 Corinthians 4:5; 15:24-28, 35-58; 2 Corinthians 5:10; Philippians 3:20-21; Colossians 1:5; 3:4; 1 Thessalonians 4:13-18; 5:1-11; 2 Thessalonians 1:7-10; 2; 1 Timothy 6:14; 2 Timothy 4:1, 8; Titus 2:13; Hebrews 9:27-28; James 5:8; 2 Peter 3:7-13; 1 John 2:28-3:3; Jude 14; Revelation 1:18; 3:11; 20:1-22:13

1.4.9. This Statement of Faith does not exhaust the extent of our beliefs. The Bible itself, as the inspired and infallible Word of God that speaks with final authority concerning truth, morality, and the proper conduct of mankind, is the sole and final source of all that we believe. With respect to faith, doctrine, practice, policy, and discipline, the Board of Trustees is the final arbiter on the Bible's meaning and application for the purposes of the University.

2. Control and Management.

2.1. The charter vests the control of the affairs of Union University in its Board of Trustees, which consists of not fewer than eighteen (18) nor more than thirty-six (36) in number, elected by the Tennessee Baptist Convention according to the current Tennessee Baptist Convention Constitution and Bylaws. Each year, during the spring meeting, the Board of Trustees will designate the number of Trustees (between 18 and 36) to serve on the Board for the following year.

2.2 In addition to the elected Trustees outlined in 2.1, the President of the Tennessee Baptist Convention and the Executive Director of the Tennessee Baptist Mission Board shall serve as non-voting ex officio Trustees.

2.3. The Tennessee Baptist Convention shall have authority to prescribe the terms of office for Trustees, the terms governing the removal of a Trustee from office, subject to Section 13 of the University Charter, and the manner of electing trustees to fill vacancies that may arise in such Board of Trustees.

2.4. The duties and responsibilities of the Board of Trustees are: (1) to select the President; (2) to advance the mission of the University in ways consistent with the Mission, Identity, Vision, and Statement of Faith; (3) to ensure that the institution has adequate resources for its operation; (4) to establish broad institutional policies; (5) to see that these institutional policies are implemented by the administration which alone is responsible for the implementation of policies; (6) to promote the institution to its various constituencies; and (7) to protect the institution from undue pressure from external forces. The Board is an autonomous body which operates independently and without undue pressure from any external body. The authority of the Board is vested in the corporate body as a whole and its actions are the decisions of the whole and not of any one member.

2.4.1. The President shall be selected or terminated by a two-thirds vote of all Trustees present or a majority of the Trustees in office, whichever is greater.

2.5. A Trustee or officer shall discharge his or her duties as a Trustee or officer, including duties as a member of a committee, in good faith, and with the care an ordinarily prudent person in like position would exercise under similar circumstances, and in a manner the Trustee or officer reasonably believes to be in the best interests of the University. In discharging such duties, the Trustee or officer is entitled to rely on information, opinions, reports, or statements, including financial statements and other financial data, if prepared or presented by one or more officers or employees of the University whom the Trustee or officer reasonably believes to be reliable and competent in the matters presented, and by legal counsel, public accountants, or other persons as to matters the Trustee or officer reasonably believes are within the person's professional or expert competence, and by a committee of the Board of Trustees of which the Trustee or officer is not a member, as to matters within its jurisdiction, if the Trustee or officer reasonably believes the committee merits confidence.

In discharging Board or committee duties, a Trustee must disclose or cause to be disclosed, to the other Board or committee members information not already known by the Board or committee members but known by the Trustee to be material to the discharge of his or her decision-making or oversight functions, except that disclosure is not required to the extent that the Trustee reasonably believes that doing so would violate a duty imposed by law, a legally enforceable obligation of confidentiality, or a professional ethics rule.

The duty of an officer includes the obligation to inform: (1) the superior officer to whom, or the Board of Trustees or the committee thereof to which, the officer reports, of information about the affairs of the University known to the officer, within the scope of the officer's functions and known to the officer to be material to the superior officer, Board, or committee; and (2) the officer's superior officer, or another appropriate person within the corporation, or the Board of Trustees, or a committee thereof, of any action or probable material violation of law involving the corporation or material breach of duty to the corporation by an officer, employee, or agent of the corporation, that the officer believes has occurred or is likely to occur.

2.6. Trustees are obliged to fulfill their fiduciary duty to the corporation by disclosing conflicting interest transactions.

2.7. The Board of Trustees may from time to time elect fellow Trustees who have served the University with distinction to the position of Trustee Emeritus. Trustee Emeriti shall be invited to attend meetings of the Board of Trustees and to contribute to discussion of matters before the Board, but they shall not have any of the rights or duties of Trustees. Trustee Emeriti shall serve at the pleasure of the Board.

3. Meetings of the Trustees.

3.1. The Board of Trustees shall meet three times annually, generally the Friday following Easter Sunday (spring meeting), the Friday following Labor Day (fall meeting), and the Friday following Thanksgiving weekend (winter meeting). The specific dates, times, and places of these regular meetings shall be fixed by the Board of Trustees. Special meetings may be called by the Chairman of the Board upon written request to him or her of ten or more trustees or by vote of the Executive Committee.

3.2. Written or printed notice stating the place, day, and hour of any meeting of the Board of Trustees shall be delivered to each Trustee at least ten days prior to the meeting, either personally, by mail, commercial delivery service, or by electronic transmission to each Trustee, provided in the case of electronic transmission the Trustee has consented to receiving notice in such manner. Notice of a meeting at which the Board of Trustees will consider approval of (1) an amendment of the Charter or Bylaws, (2) merger, (3) conversion, (4) sale, lease, exchange, or other disposition of all or substantially all of the Corporation's property, or (5) dissolution, shall contain notice that the matter will be voted upon at the meeting. Notice of a meeting at which the Board of Trustees will consider approval of an amendment of the Charter or Bylaws shall contain a copy of the proposed amendment.

3.3. A quorum of the Board of Trustees shall consist of a majority of the Trustees in office immediately before a meeting begins. When a quorum is once present to organize a meeting, a meeting may be later adjourned despite the absence of a quorum caused by the subsequent withdrawal of any of those present. If a quorum is present when a vote is taken, the affirmative vote of a majority of the Trustees present is the act of the Board unless the Charter, Bylaws, or Tennessee Nonprofit Corporation Act require the vote of a greater number of Trustees.

3.4. The order and conduct of business at the meetings of the Board of Trustees shall be governed generally by Robert's Rules of Order as modified by rules and regulations of the Board. The following order shall generally prevail: (1) call to order; (2) roll call; (3) devotion and prayer; (4) approval of minutes of last regular meeting and any special meetings held subsequently; (5) report of the President; (6) standing committee meetings;

(7) old business; (8) new business; (9) executive session; (10) adjournment.

3.5. The members of the Board of Trustees, or any committee thereof, may permit Trustees or committee members, as the case may be, to participate in a meeting by, or conduct the meeting through the use of, any means of communication by which all trustees or committee members participating may simultaneously hear each other during the meeting. One participating in a meeting by this means is deemed to be present in person at the meeting.

3.6. Any action required or permitted to be taken at a meeting by the Board of Trustees, or by any committee thereof, may be taken without a meeting if all voting members of the Board or committee, as the case may be, consent in writing to taking such action without a meeting. If all consent, then the affirmative vote of the numbers of Trustees or committee members that would be necessary to authorize or take such action at a meeting shall be the act of the Board or committee. This action shall be evidenced by one or more written consents describing the action taken, signed by each Trustee or committee member, and included in the minutes filed with the corporate records reflecting the action taken. Action taken under this section is effective when the last Trustee or committee member signs the consent, unless the consent specifies a different effective time. A consent signed under this section has the effect of a meeting vote and may be described as such in any document.

3.7. Minutes of the meetings of the Board of Trustees shall be sent to each Trustee following the meeting.

3.8. Trustees and Trustee Emeriti shall be reimbursed for expenses incurred by attendance at meetings in accordance with the established policy of the institution for travel and other out-of-pocket expenses.

4. Officers.

4.1. The officers of the Corporation shall consist of a Chairman of the Board, Vice Chairman of the Board, Secretary of the Board, and President. The Chairman, Vice Chairman, and Secretary shall be elected by the Board of Trustees at the fall meeting to serve until the next fall meeting or until their successors have been elected and qualified. Their terms shall begin at the adjournment of the fall meeting. The President shall be selected by the Board and shall serve at the pleasure of the Board.

4.2. At least thirty (30) days preceding the fall meeting of the Trustees, the Chairman shall appoint a Nominating Committee from among current and former Trustees. The duty of the Nominating Committee shall be to nominate officers and committee members of the full Board and the Executive Committee for the ensuing year and report such nominations to the Trustees at the fall meeting for their action.

4.3. In case of failure to elect any or all of said officers, or in case any vacancy occurs,

an election may be held at any regular or special meeting, a majority of all the Trustees being present and due notice of such election having been given.

4.4. The Chairman of the Board shall preside at all meetings of said Trustees, both the full Board and the Executive Committee, and shall perform such other duties as may be required by the Board of Trustees. He or she shall receive no salary for his or her services.

4.5. The Vice Chairman of the Board shall preside at all meetings in the absence of the Chairman and shall perform such other duties as may be assigned to him or her by the Board. He or she shall receive no salary for his or her services.

4.6. The Secretary of the Board, in cooperation with the President, shall have custody of the corporate records and papers, and shall have responsibility for preparing minutes of meetings of the Board of Trustees and of the Executive Committee, and for authenticating records of the Corporation. He or she shall transmit, or have transmitted, within a reasonable timeframe to each Trustee a copy of the minutes of all meetings of the Trustees and the Executive Committee and to each Trustee notice of such action of the Board as relates to the duties of such Trustee. He or she shall receive no salary for his or her services.

4.7. President.

4.7.1. It shall be the duty of the President to execute the policies of the institution as determined by the Board of Trustees. He or she is responsible for the internal life of the University as well as its relationship to the Tennessee Baptist Convention and any other external constituencies. The President shall be the chief executive officer of the Corporation.

4.7.2. As the responsible head of the University selected by the Trustees for such time and upon such terms as they deem proper, the President is directly responsible to the Board of Trustees. The Trustees look to him or her for the conduct, character, and work of the University. The President shall be a faithful member in good standing of a local Southern Baptist congregation.

4.7.3. The President should be apprised of all matters pertaining to the internal operation of the University, both academic and fiscal, and his or her approval shall be sought before decisions of consequence are made. He or she shall be the final executive authority in all matters of discipline. He or she shall serve as a non-voting participant of all committees of the Board and as a non-voting member of all committees within the University.

4.7.4. The President shall develop and execute a budget for each fiscal year in which the planned expenditures shall not exceed the funds available or conservatively projected to be received for that fiscal year.

4.7.5. The President shall be the primary medium of all communications between all

people working under his or her direction and the Board of Trustees and shall be the official spokesman for the University.

4.7.6. It shall be the duty of the President to appoint all faculty and staff and no such faculty or staff shall be employed without his or her recommendation. The President shall fill all positions with individuals known for their Christian commitment and excellence in service with preference given to Southern Baptists. The Dean and all faculty members of the School of Theology and Missions shall be faithful members in good standing of a local Southern Baptist congregation.

4.7.7. The President is responsible for creating and developing a strategic plan with consultation from administrators, faculty, staff, and student leaders. The plan must be approved by the full Board of Trustees, with each portion of the plan monitored by the appropriate committee.

4.7.8. The President shall make a report to the Board of Trustees at each of its regular meetings on the state of the University and shall seek Trustee consideration on such measures as he or she deems expedient for its welfare.

4.7.9. The President shall be the chief executive also of those departments, officers, and employees not attached to the instructional staff with authority to hire employees or discharge employees of the University.

4.7.10. The President shall have the power to acquire or convey property of Union University on the authority of the Board of Trustees or the Executive Committee acting for the Board.

4.7.11. In case of vacancy in the office of the President of the University, or of prolonged absence, or his or her inability to serve, the Board shall appoint an Acting President of the University in accordance with 2.4.1.

4.7.12. The President shall perform such other duties as may be prescribed to him or her by the Trustees or the Executive Committee.

4.8. The officers shall be responsible for Trustee recruitment. This shall be facilitated by the President and through him or her to the appropriate Tennessee Baptist Convention committee. Candidates shall be sought who are dedicated Southern Baptists and who are influential and willing to labor for the University. It shall also be the responsibility of the officers to recommend committee membership for new members.

5. Committees of the Board.

5.1. The Board of Trustees may create Committees of the Board. Such a Committee shall consist of at least three persons, a majority of whom shall be Trustees. Committee

members shall serve at the pleasure of the Board. The creation of a Committee of the Board and appointment of members to it must be approved by a majority of the Trustees in office when the action is taken. The chairman of a Committee of the Board shall be a Trustee and shall be identified by the action of the Board of Trustees.

5.2. A Committee of the Board may exercise the Board's authority but only if and only to the extent such authority is vested in the committee by the Bylaws or by action of the Board of Trustees by the vote of a majority of Trustees in office. These Bylaws vest authority only in the Executive Committee. Neither the Executive Committee nor any other Committee of the Board shall authorize distributions; elect, appoint, or remove Trustees or fill vacancies on the Board or on any Committee of the Board; or adopt, amend, or repeal the Charter or Bylaws.

5.3. Notice of Meetings of a Committee of the Board shall be provided to members of the Committee of the Board in the same fashion as notice of meetings of the Board of Trustees are provided to Trustees in Section 3.2. of these Bylaws. Meetings of a Committee of the Board shall be conducted generally according to Robert's Rules of Order for committees and small boards. Participation in a meeting of a Committee of the Board by a member of the committee shall be allowed in the same manner Section 3.5 permits participation by a Trustee in a meeting of the Board of Trustees. Action may be taken by a Committee of the Board without a meeting in the same fashion action may be taken by the Board of Trustees without a meeting as provided in Section 3.6.

5.4. A quorum of a Committee of the Board shall consist of a majority of the members of the Committee of the Board immediately before a meeting begins. When a quorum is once present to organize a meeting, a meeting may be later adjourned despite the absence of a quorum caused by the subsequent withdrawal of any of those present. If a quorum is present when a vote is taken, the affirmative vote of a majority of the members present is the act of the Committee of the Board unless the Bylaws or the Tennessee Nonprofit Corporation Act require the vote of a greater number of Trustees.

5.5. Persons serving as chairmen of Standing Committees and those serving as at-large members of the Executive Committee will normally be rotated off after a period of no more than three years in order to provide for other Trustees to have opportunity to serve in places of leadership and responsibility.

6. Standing Committees.

6.1. These Bylaws create the following Standing Committees as Committees of the Board. Appointment of members to the Standing Committees and the designation of each Committee's chair, except the Executive Committee, shall occur upon the vote of a majority of Trustees in office at the fall meeting of the Board of Trustees following the receipt of nominations by a Nominating Committee appointed by the Chairman of the Board of Trustees. The Chairman of the Board shall serve as an ex officio member of each

Standing Committee and as Chairman of the Executive Committee. Members of Standing Committees shall serve until their successors are appointed.

6.2. Executive Committee. This committee shall be elected by the Board and shall have power to transact the business of the Board between stated meetings of the Board or whenever it is impractical to call a meeting of the Board. It shall transact any special business committed to it and shall be an advisory council for the President. A special function of this body will be the responsibility to protect the institution from undue external pressures as presented to the group by the President of the University. The Executive Committee shall within twenty-four (24) hours advise the Trustees in writing of any action taken by the Executive Committee pursuant to its authority to act on behalf of the Board. The Executive Committee shall be composed of the officers of the Board, the chairmen of the standing committees, the Union University Foundation Representative, and at least one and no more than two at-large members from the Board. The Executive Committee shall function as the personnel committee of the Board. The Executive Committee shall be composed of no more than twelve (12) persons.

6.3. Academic Affairs Committee. This committee shall be responsible to the Board for recommending educational policy designed to achieve the objectives of the University and reviewing the University operation—evaluating compliance with policy and achievement of goals established. The Academic Affairs Committee shall review the recommendations of the President as they may have been developed through the work of the chief academic officer and the faculty where the educational program is involved, particularly curriculum and faculty development matters. It shall advise the President and recommend to the Board both immediate action and long-range programs and plans.

6.4. Finance and Audit Committee. This committee shall be responsible to the Board for recommending financial policies for the effective and efficient operation of the University and for reviewing the University operation, evaluating the compliance with policy and the achievement of objectives. The Finance and Audit Committee may specialize in the handling of its work by delegating to certain members assignments for (1) investments, (2) budget, (3) real estate, (4) campus projects, and (5) the annual audit. However, because of the interrelatedness of the Finance and Audit Committee, the committee shall operate as a unit as it recommends policy and evaluates operation. It shall advise the President and receive his or her recommendations as they may have been developed through the chief financial officer, staff, and faculty on both immediate and long-range plans. Financial statements are annually submitted to auditors selected by the Tennessee Baptist Convention.

6.5. Institutional Advancement Committee. This committee shall be responsible to the Board for recommending policy for the advancement of the University and for the evaluation of the programs and progress in achieving the objectives. The Institutional Advancement Committee shall review the recommendations of the President as they may have been developed through the chief development officer, chief enrollment officer,

faculty, staff, volunteer groups, and alumni. It shall recommend policies and programs that will provide the necessary funds, students, information, and proper relations with the various publics of the University, including recruiting strategies and marketing.

6.6. Student Life and Ministry Committee. This committee shall be responsible to the Board for recommending student life and university ministry policies as well as church relations and partnership with the Tennessee Baptist Convention, and for evaluating compliance with policy and achievement of established goals. It shall advise the President and Board on matters affecting student life and ministry on the campus. The Student Life and Ministry Committee shall review the recommendation of the President as they may have been developed through the chief student affairs officer and the chief university ministries officer.

7. Special Committees.

7.1. The Board of Trustees may create or authorize the creation of one or more special committees, including advisory committees, whose members need not be Trustees. Such committees shall not be a Committee of the Board and may not exercise any of the powers of the Board.

8. Amendments.

8.1. These Bylaws may be amended or repealed at any regular meeting of the Board of Trustees, or any special meeting called for that purpose, by a two-thirds vote of all Trustees present or a majority of the Trustees in office, whichever is greater. Notice of the meeting at which the amendment is to be considered shall be given each Trustee as required by Bylaw 3.2. and the notice shall contain a copy of the proposed amendment.

Attachment 8: Letter of Insurance Coverage

Attached is a certificate of liability insurance with all the various types of liability insurance policies for Union University. Union Academy will seek similar insurance policies with appropriate coverage limits if the current Union University insurance policies do not cover Union Academy. Currently, Union University has over \$400 million in property insurance, and additional insurance will be secured once a site for Union Academy has been determined.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

04/14/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER The Allison Insurance Group, Inc. 115 Directors Row (38305) P.O. Box 10068 Jackson TN 38308-0101		CONTACT NAME: Leslie Harrison PHONE (A/C, No, Ext): (731) 668-8444 FAX (A/C, No): (731) 668-9397 E-MAIL ADDRESS: leslie@allison-ins.com	
INSURED Union University of Jackson Tennessee 1050 Union University Drive Jackson TN 38305		INSURER(S) AFFORDING COVERAGE INSURER A: Travelers Insurance Company INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	

COVERAGES

CERTIFICATE NUMBER: CL2512706687

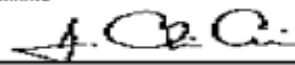
REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDC INSD	BUSH WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC ☐ OTHER:			630-6X482450	03/29/2025	03/29/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000 Employee Benefits \$ 1,000,000
A	☒ AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY			BA-5X537720	03/29/2025	03/29/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Uninsured motorist \$ 1,000,000
A	☒ UMBRELLA LIAB ☐ EXCESS LIAB ☐ DED ☐ RETENTION \$			CUP-9W857827	03/29/2025	03/29/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 20,000,000 EACH OCCURRENCE \$ 20,000,000 AGGREGATE \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	UB-5X553086	03/29/2025	03/29/2026	☒ PER STATUTE ☐ OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Union University of Jackson Tennessee	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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ACORD 25 (2016/03)

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ADDITIONAL COVERAGES							
Ref #	Description Underinsured motorist combined single limit				Coverage Code UNCSL	Form No.	Edition Date
Limit 1 Included	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description Medical payments				Coverage Code MEDPM	Form No.	Edition Date
Limit 1 5,000	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description Expense constant				Coverage Code EXCNT	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description WC & Employer's liability				Coverage Code WCEL	Form No.	Edition Date
Limit 1 1,000,000	Limit 2 1,000,000	Limit 3 1,000,000	Deductible Amount	Deductible Type	Premium		
Ref #	Description Drug Free Credit				Coverage Code DRUGF	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description Terrorism Coverage				Coverage Code TERRO	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description Catastrophe Coverage				Coverage Code CATAS	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description Experience Mod Factor 1				Coverage Code EXP01	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description Premium discount				Coverage Code PDIS	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description				Coverage Code	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		
Ref #	Description				Coverage Code	Form No.	Edition Date
Limit 1	Limit 2	Limit 3	Deductible Amount	Deductible Type	Premium		

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Attachment 9: Operating Budget Template

See separate electronic file- Union Academy_Attachment 9_ Operating Budget