



Final Protocol Overview

The Covenant School Survivors Fund (the Fund) will distribute funds as gifts to victims and survivors of the March 27, 2023, shooting at the Covenant School in Nashville, TN. The funds may be used however the recipients wish.

Decisions about eligibility and distribution are made by the local Steering Committee with intentions of transparency, integrity, compassion, and fairness. This Final Protocol was created with guidance from National Compassion Fund, which has led numerous similar efforts after mass casualty events, and informed by the community feedback received.

The Final Protocol includes four categories of eligibility:

- Legal heirs of those who were killed as a direct result of the shooting
- Those who suffered some type of physical injury during the shooting
- Teachers and Staff present on campus at the time of the shooting
- Those who were present on campus at the time of the shooting and suffered psychological trauma

An online application will then be available online around July 21, 2023.

All interested parties should sign up for the Fund's contact list by filling out and submitting the form on <https://nationalcompassion.org/fund/Nashville/>. Emails will be sent regarding:

- When the Final Protocol for the Fund is available
- When the application is available
- When the deadline for submitting an application is approaching

Representatives from the National Compassion Fund are available to help throughout this process through meetings or phone calls. Email Nashville@NationalCompassion.org with any questions or to set up a meeting.

The Covenant School Survivors Fund will distribute donations collected by:

- VictimsFirst
- The Community Foundation of Middle Tennessee

Covenant School Survivors Fund Local Steering Committee

Matt Fleming	The Covenant School Parent and Board Vice Chair, Chair of the March 27 Advisory Board
Josh Eaves	The Covenant School Parent and Board Member, West End Community Church Elder
Bryan Bolton	The Covenant School Parent and Board Member, West End Community Church Member
Allen Perry	The Covenant School Parent, Avenue South Baptist Member
Doug Hixson	Covenant Church Elder
Gary Dean	Covenant Church Member
Jamie Kuhlman	Licensed Psychologist & Covenant Church Member
Rob Alley	Covenant Church Deacon Board Treasurer
Melissa Holmes	VictimsFirst representative and mass shooting survivor
Claire Sawyer	Attorney & Covenant Church Member
Amy Fair	Community Foundation of Middle Tennessee (<i>ex officio</i>)
Kelly Walberg	Community Foundation of Middle Tennessee (<i>ex officio</i>)

Final Protocol

June 30, 2023

This Final Protocol, which will govern distribution of the Covenant School Survivors Fund (the Fund), was developed by the Fund Administrators, incorporating relevant and appropriate feedback from the Steering Committee, the National Compassion Fund (NCF), the survivors and victims, and the Covenant Community, including those present at the Town Hall meeting held by the Administrators on June 20, 2023.

The money paid by the fund is a gift to which no person has a legal claim or entitlement. All aspects of this Final Protocol including, without limitation, the classifications of applicants, distribution criteria, application process, and timetable, may be revised and are subject to the full and complete discretion of NCF, which serves as Fund Administrator. The level of benefits paid within each category of eligibility is determined by the steering committee.

The Fund was created in partnership with Covenant School and the Community Foundation of Middle Tennessee. The Fund was enhanced through the generosity of businesses, foundations, and individual donors. It will be used to assist the families of the victims who were killed, the victims who were physically injured, and the victims who were present at the Covenant School during the shooting (the Shooting) on March 27, 2023. The National Compassion Fund, LLC is a subsidiary of the National Center for Victims of Crime, a 501(c)(3) nonprofit organization (Federal Tax ID #30-0022798). The Community Foundation of Middle Tennessee is a 501(c)(3) nonprofit organization (Federal Tax ID #62-1471789).

ALL APPLICATIONS MUST BE SUBMITTED ONLINE NO LATER THAN AUGUST 11, 2023, TO BE ELIGIBLE TO RECEIVE PAYMENT. IF THE VICTIM IS UNDER THE AGE OF 18 OR IS A VULNERABLE ADULT, A PARENT OR GUARDIAN MUST APPLY ON THE VICTIM'S BEHALF.

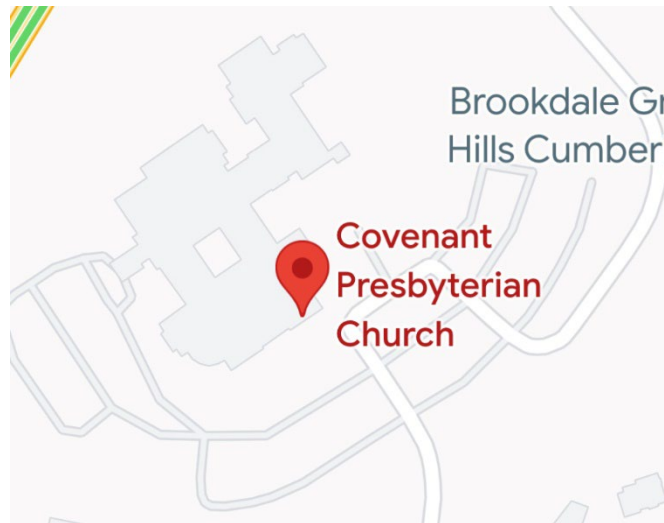
The amounts awarded from the Fund will take into consideration variables that include: (1) the balance in the Fund when it is closed for donations on August 20; (2) the completion of the review of all submitted applications; and (3) the review and approval by the Administrators. The Administrators reserve all rights to determine the validity of all information submitted by applicants.

Neither citizenship nor immigration status will be considered in determining an applicant's eligibility.

SECTION ONE: ELIGIBILITY

AREA OF ELIGIBILITY

Individuals in the categories listed below will be deemed to have been "present" and eligible for payment if they were physically present on Covenant Presbyterian Church campus (inside or outside), the Covenant School or Covenant Presbyterian Church (as indicated by Figure 1 below) between 10:11 am and 10:27 am on March 27, 2023.



CATEGORIES OF ELIGIBLE APPLICANTS (ELIGIBILITY IS LIMITED TO ONE CATEGORY)

A. Application for Legal Heirs of Those Killed

Eligible applicants for the six deceased victims killed as a result of the Shooting will receive the highest level of payment under the scope of this Final Protocol. A final payment determination will be made upon receipt of all pertinent data and is subject to all comments above.

B. Individual Physical Injury Applications

Eligible applicants who were physically present within the area of eligibility designated in figure 1 above at the Covenant Campus at the time of the Shooting, were physically injured as a direct result of the shooting, and who received medical treatment no later than Saturday, April 15, 2023, will receive a payment under this Final Protocol.

C. Teachers and Staff Present on Campus

Teachers and Staff who were physically present within the area of eligibility designated in figure 1 above at the Covenant Campus AND who had children in their care at the time of the Shooting, will receive a payment under this Final Protocol. A higher level of payment may be provided in this category to individuals who were present in Classroom 210 or Classroom 212 during the Shooting.

D. Individuals Present on Campus Experiencing Psychological Trauma

Any individuals, excluding first responders, who were physically present within the area of eligibility designated in figure 1 above at the Covenant Campus at the time of the Shooting and experienced psychological trauma are eligible to receive payment under this Final Protocol. A higher level of payment may be provided in this category to individuals who were present in Classroom 210 or Classroom 212 during the Shooting.

SECTION TWO: PROCESS AND PROCEDURES

Eligible applicants must file an application in order to receive a payment from the Fund. **ALL APPLICATIONS MUST BE SUBMITTED BY THE DEADLINE OF AUGUST 11, 2023;** however, the Fund Administrators reserve the right in their sole discretion to grant a deadline extension.

When completing the application, applicants will specify the category of the applicant: for deceased victims, for physical injury, for teachers and staff, or for psychological trauma. In their application, applicants must choose only one distribution category for which they are eligible.

Each eligible applicant should submit only one application per victim. An applicant may submit more than one application only on behalf of separate victims. For example, a person who was present or injured may submit their own application. They may also submit an application on behalf of a minor (if that person is the designated parent or legal guardian of the minor) or on behalf of a family member who was killed (if they are the designated representative).

The process and procedures for consideration of eligible applications will be as follows:

A. The Fund will be administered by NCF. The Final Protocol to govern the Fund and a link to submit an online application for benefits will be emailed to all known potential applicants who have signed up for the Fund's contact list on the NCF website (<https://nationalcompassion.org/fund/Nashville/>). The Final Protocol and information concerning the application process will also be available on the NCF website beginning on June 30, 2023. Representatives from NCF (the Fund Administrators) will administer and process the applications. Only one application should be submitted by, or on behalf of, each victim. All applications must be completed and submitted to the Fund Administrators (along with all required supporting documentation detailed in the application or such information curing any deficiencies in information) no later than August 11, 2023. Questions regarding the completion of an application should be sent via email to Nashville@NationalCompassion.org.

B. A community meeting was conducted by the Fund Administrators on June 20, 2023, at 6:00 p.m. at West End Community Church. At the meeting, there was an explanation of the Final Protocol and the application submission process, and Fund Administrators and the Local Steering Committee invited input and comments from potential applicants. Information collected from this meeting, various communications, and correspondence between the applicants, other interested parties, and the Fund Administrators were considered in finalizing the Final Protocol.

C. Access to the application online will be available at <https://nationalcompassion.org/fund/Nashville/> around July 21, 2023. Applicants who lack access to the internet are invited to call the toll-free applicant assistance number at 844-743-3334, ext 705 for guidance on alternative filing assistance.

D. In the event that an applicant submits an incomplete or deficient application (e.g., the applicant failed to include required documentation or failed to fully complete the application), a representative from the Fund Administrators' office will send an e-mail notification to the applicant in an effort to resolve any such deficiencies.

E. Shortly after the deadline for submission of all financial contributions and the final review and determination of all eligible applications by the Fund Administrators, payments will be issued. The Fund Administrators will submit final payment determinations to the Local Steering Committee for approval of transmission of the payments, by check or electronic transfer, to each eligible applicant. Applicants may not rely on the timing of any payment. The Administrators, the Local Steering Committee, and NCF shall have no liability whatsoever for any damage of any kind arising out of or resulting from the timing of any payment from the Fund.

F. An application filed for a deceased victim will require information pertaining to individuals (e.g., spouse, children, parents, siblings) who may be eligible to receive compensation under the local intestacy law of the jurisdiction where the deceased victim was domiciled. If the victim was married at the time of death, the victim's spouse must submit the application. In cases where the victim was not married, the personal representative legally authorized to administer the Estate must submit the application, and in the event a personal representative has not been appointed, the victim's next of kin must submit the application. If the deceased had a Last Will & Testament, the applicant must prepare a proposed plan of distribution of the funds among beneficiaries identified in the Will consistent with the Will. If the deceased did not leave a Last Will & Testament, the applicant must prepare a proposed plan of distribution of the funds among the deceased's legal heirs. In circumstances where the deceased was, at the time of their death, engaged to be married, cohabitating with an intimate partner, or separated from a spouse, the Fund Administrators may, in their discretion, require a fiancé, intimate partner, or children of the deceased to be included in the proposed distribution plan. The proposed plan will be distributed to all such legal heirs, beneficiaries, and fiancé or cohabitating intimate partner, each of whom must consent to the proposed distribution. If agreement among the heirs cannot be reached as to who will serve as the designated applicant on behalf of the deceased victim or with regard to the proposed distribution, the competing applicants will be required to obtain legal authorization from the Probate Court having jurisdiction to determine who is the legally responsible person eligible to file the application. Under those circumstances, the Fund Administrators will, in their discretion, withhold funds until an agreement is reached, or deposit the affected funds with the Probate Court having jurisdiction, to be held in a separate account, and to be distributed only upon resolution in accordance with a valid court order.

G. A minor child's application must be submitted and signed by a parent or legal guardian. If an application is required for a vulnerable adult lacking legal capacity, it will require proof of

representative capacity, such as a power-of-attorney, guardianship, and appointment of guardian or attorney *ad litem*.

H. An application filed for a physical injury applicant must include an authorization to release medical information which confirms: (i) the date of initial treatment, (ii) the date of admission to the hospital if applicable, (iii) the date of discharge from the hospital if applicable, and (iv) the nature of the injury and contemporaneous evidence from the treating professional that the injury was sustained as a result of the Shooting.

I. An application filed for teachers and staff must have the applicant's presence at the Covenant campus at the time of the Shooting corroborated by Covenant Presbyterian Church or Covenant School employment records. The Fund Administrators (rather than the applicant) will be responsible for validating this information.

J. An application filed for psychological trauma must have the applicant's presence at the Covenant campus at the time of the Shooting corroborated by Covenant Presbyterian Church or Covenant School employment or attendance records or by law enforcement records. The Fund Administrators (rather than the applicant) will be responsible for validating this information.

K. NCF, its Fund Administrators, and the Local Steering Committee will use reasonable efforts to maintain confidentiality of all information submitted by applicants but cannot guarantee confidentiality. Applicants are asked to consider any personal ramifications should any information submitted under this Final Protocol become publicly available.

L. The Fund cannot provide tax advice to those receiving payments from the Fund. The Fund Administrators recommend consulting a tax advisor for any questions regarding tax liability for these payments.

M. When all distributions of payments have been completed, a full examination of the Fund will be conducted according to Agreed Upon Procedures by an independent auditing firm. The results of these Agreed Upon Procedures will be made available to all applicants, donors, and the general public, along with a Final Report from the Fund Administrators.

SECTION THREE: OUTREACH AND COMMUNICATION

A. The National Compassion Fund (NCF) may conduct outreach to victims of the Shooting by telephone, mail, in person, and other forms of electronic communication to provide them with information on the application process, to answer questions related to the filing of applications, to assist victims in curing deficiencies on applications, and to work to ensure that all eligible persons who wish to submit applications are able to do so before the August 11, 2023, filing deadline. NCF does not guarantee that all who may be eligible will be contacted, nor does it guarantee that all eligible persons who are in contact with NCF will be included in the Final Distribution. It is the responsibility of the applicant to make sure that the application is timely filed and received. Contact information that is held by law enforcement or healthcare professionals is never shared with NCF, and there

should be no assumption that anyone who is eligible will be contacted simply because they have shared their contact information with either law enforcement, the Red Cross, or any other service provider. Contact information must be shared with NCF via the Fund-specific online contact form.

B. The Final Protocol and application information will be disseminated to all known victims who have signed up for the online contact form on <https://nationalcompassion.org/fund/Nashville/>. The Fund Administrators will work directly with applicants as requested so that applications are submitted by the August 11, 2023, deadline.

C. Applicants may request to schedule optional meetings face-to-face or by telephone with the Fund Administrators. All applications will be processed during the period between July 21, 2023, and August 11, 2023. All applicants requesting meetings with the Fund Administrators before the application is processed will be afforded such a meeting during the period between July 18, 2023, and August 10, 2023. Meetings will be scheduled at mutually convenient times and locations. To request a meeting, please email a request to Nashville@NationalCompassion.org.

SECTION FOUR: PROPOSED NASHVILLE TIMELINE

- March 27, 2023 – Shooting occurs
- June 20, 2022 – Town Hall Meeting and Covenant School Community public comment period ends
- June 21, 2022 – Steering Committee meets to approve Final Protocol
- June 30, 2023 – Final Protocol published to NCF website for survivors, victims, and interested parties
- July 21, 2023 – Application is available online. Application instructions are disseminated to all known applicants and potential applicants.
- **July 21 – August 11, 2023 – Applications completed (with required documentation) and submitted to the Fund Administrators**
- July 18, 2023 – August 10, 2023 – All personal meetings requested with the Fund Administrators completed
- July 21, 2023 – August 31, 2023 – All applications reviewed by the Fund Administrators. Recommendations for payments to eligible applicants submitted to the Steering Committee for independent review and approval.
- **August 11, 2023 – Deadline for submission of applications**
- August 20, 2023 – Fund closes to donations
- September 7, 2023 – Steering Committee approves Funds Distribution Plan
- September 18, 2023 – Distribution of payments to approved eligible beneficiaries begins on a rolling basis
- Three weeks after the end of the month in which all disbursements are completed – Independent auditing firm conducts examination of Fund according to Agreed Upon Procedures