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## **Application Coversheet**

Coversheet (p. 1) – Number of campuses requested 5.

Change the number of campuses from 5 to 2.

Maximum Enrollment (p. 1) - No response provided on application cover page.

The max enrollment for the first five years of operation should be as follows:

Year 1: 608

Year 2: 867

Year 3: 1545

Year 4: 1869

Year 5: 1965

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### **Applicant Checklist**

### GREAT HEARTS ACADEMIES - SAN ANTONIO

### Proposed Seventeenth Generation Charter School Name

This checklist MUST be completed and submitted as part of the application to ensure that the applicant has provided all of the information required by the RFA.

### Application

- X Attended Applicant Conference: Date: December 8, 2011 Board Member Who Attended: Peter Bezanson
- X Application Coversheet
- X Table of Contents
- X Applicant Checklist (this document)

Application Sections (All questions in each section must be answered completely.)

- X 1. Statement of Need
- 2. Vision of the School
- X 3. Community Support
- X 4. Student Goals
- S. Educational Plan
- 6. Special Needs Students and Programs

### Attachments A - R

- X A. Published Notice of Public Hearing
- 🗙 B. Synopsis of Public Hearing
- X C. Signed Certified Mail Receipt Cards
- X D. Notarized Biographical Affidavits
- E. 501(c)(3) Determination Letter from IRS
- F. Articles of Incorporation and All Amendments
- X G. Bylaws of the Sponsoring Entity and All Amendments
- X H. Organizational Chart
- X I. Supplemental Human Resources Information Forms

Assurance Documents and Required Campaign Contribution Form - Completed and Signed

- X 1. Special Education Assurances and Development of Policies and Procedures
- 2. Bilingual Education/ESL, Section 504, and Dyslexia Assurances
- 3. General Application of Assurances for Federal Programs
- X 4. Special Assurances Document

**Great**Hearts

☑ 5. State Board of Education Disclosure of Campaign Contributions form

### The CEO of the sponsoring entity acknowledges the following:

- I. The application and 13 copies submitted are printed single-sided and at least one copy has been retained for the organization's records.
- 2. Applications must be received by Document Control at the Texas Education Agency by the stated deadline in the Request for Application in order to be considered.
- 3. All submissions become the property of the Texas Education Agency and will not be returned.

Anne McCiellan	Peter Bezanson					
Name of Application Preparer (Typed)	Name of CEO of Sponsoring Entity (Typed)					
MO	1 1 2/20 /2017					
Signature of Application Preparer Date	Signature of CEO of Sponsoring Entity Date					

- 7. Geographic Boundary
   8. Admissions and Enrollment Policies
- S 9. Governance
- X 10. Human Resources Information
- X 11. Business Plan
- X J. Audit Report
- X K. Credit Report
- X L. IRS 990 Filing
- X M. Documentation Verifying All Sources of Funding

**GREAT HEARTS AMERICA - TEXAS** 

Name of Sponsoring Entity

- X N. Start-Up Budget
- X O. Budget for Year One of Operation
- P. Negotiated Service Agreement(s)
- Q. Certificate of Occupancy or Equivalent Certificate
- R. Negotiated Lease Agreement(s), Deed(s) to Property, Earnest Money Contract(s), or Purchase Agreement(s)

## Texas Charter Application: Great Hearts America- Texas

### 1. Statement of Need

a) Discuss why members of the sponsoring entity believe that the proposed school is needed and why they believe that sufficient demand exists to make the school viable.

The mission of Great Hearts America—Texas is to create and manage a national network of academically rigorous, classical, liberal arts K-12 schools, to achieve this growth systematically across the entire economic spectrum, and to place academies in communities where their presence in the educational marketplace will have the broadest impact. The twelve Great Hearts academies in Arizona have demonstrated high quality outcomes for students. Great Hearts will continue to serve the children through Great Hearts America-Texas, an organizational expansion, which will be dedicated to replicating the Great Hearts model with a network of five to ten schools in San Antonio. *Great Hearts America—Texas will establish the first school in San Antonio through a informal organizational expansion of the work Great Hearts Academies in Arizona.* 

Currently, the need for quality public high schools in San Antonio is clear. The dropout rate for students in San Antonio's urban area is 40-60 percent. Many students living in the inner city are first generation English speakers from low-income families with single head of households. The achievement and economic pressures have led many students to abandon the educational system. Additionally, parents are entitled to educational choice when the local systems fail to serve the needs of the community.

Responding to the demand for improved educational outcomes in San Antonio, Great Hearts seeks to provide more public school students and their families, who are drastically underserved by their current educational options, with a classical, preparatory education. As population growth continues to impact the local district schools in San Antonio, Great Hearts will open additional schools to respond to new student growth and community demand for additional high quality school opportunities.

### Explain how the charter school model will enhance the academic outcomes for students.

As a Texas Open Enrollment Charter School, Great Hearts America—Texas will open its first school in San Antonio to offer its high quality evidence and results-based academic program to all students. The Great Hearts model enhances academic outcomes for all children because it recognizes that children have different talents and learn at different speeds. The instructional program will seek to challenge every student all the time. All students will be required to complete the classical curriculum.

Our students study the traditional liberal arts—language and literature, math, history, science, music and art—in a coherent and orderly program. Classical education:

Values knowledge for its own sake,

4

Statement of Need (p. 4) – Confirm your understanding that the placement of special education students cannot be predetermined and that the charter will offer a full continuum of special education services.

APPROVED DURING CONTINGENCY PROCESS

Great Hearts understands the placement of special education students cannot be predetermined and will offer a full continuum of special education services.

- Upholds the validity, logic, and beauty that are inherent in the liberal arts,
- Demands moral goodness, and
- Prepares students to become responsible members of a civil society.

### 2. Vision of the School

a) In succinct terms, describe the educational philosophy and pedagogy of the proposed school.

### Philosophy

Great Hearts America – Texas believes that every student can learn. As human beings, we are equal in that we all have the capacity to learn and grow. But this equality *in* capacity cannot be confused with equality *of* capacity, and certainly not with equality of academic results. Students may not learn at the same speed, but they all will complete the same rigorous course sequence.

The Great Hearts America - Texas key philosophical pillars follow:

- The world is ordered and knowable.
- Truth exists and should be sought.
- The highest purpose of education is to form the soul.
- · Students long for clear expectations and rigor.
- Students must be nourished by the high culture of the West

Great Hearts America – Texas believes that academic accomplishment is a natural byproduct of a preparatory school culture that first values integrity, personal responsibility, and thoughtful self-reflection. Each Great Hearts academy strives to create an environment in which durable character, and the open search for it, is thus modeled and highly regarded.

### Pedagogy

Great Hearts Academy courses will be taught employing the Socratic Method, which develops thinking, speaking, and reading skills. This pedagogy is incorporated within the curriculum as a method to increase student involvement. With the Socratic Method, students are actively involved in *discovering* truths, rather than being informed through lectures in class or readings in textbooks. The teacher's responsibility is to create the right questions for discussion. Students find the answers within their reading and reflective activities.

b) Discuss the educational innovations that will distinguish this school from other schools.

The Great Hearts America – Texas' primary goal is to graduate many thoughtful leaders of character who will contribute to a more philosophical, humane, and just society. To



Vision of the School (p. 5) – Confirm your understanding that the placement of special education students cannot be predetermined and that the charter will offer a full continuum of special education services.

Great Hearts understands the placement of special education students cannot be predetermined and will offer a full continuum of special education services.

APPROVED DURING CONTINGENCY PROCESS

reach this goal, each teenager must freely discern his or her unique character and destiny during the seven-year program. Liberal education should bring each student to ask: what amongst the array of offerings and invitations spread before me in the future do I find meaningful? Graduates will then apply that confident self-understanding for a greater good beyond themselves.

The following features are essential to a Great Hearts America-Texas charter school:

<u>A Core Liberal Arts Curriculum</u>: A Great Hearts Academy requires a common and rigorous sequence of courses for all students; there are no electives. The sequence in math, science, foreign language, fine arts, and the perennial and timeless humanities exceeds the state standards in duration and content. All students graduate as critical thinkers, coherent writers, and confident speakers. All students who graduate are eligible for admissions to the finest colleges and universities in the nation.

<u>An Academy Ethos</u>: A community of students working together in pursuit of the school's lofty vision is an essential feature of a Great Hearts Academy. Students are invited and exhorted to create a community of scholarship, leadership, and service in their classrooms, in extracurricular activities, and in their relationships with peers and teachers. These academies strive to foster friendship of the noblest sort: friendships marked by a common love of the true, the good, and the beautiful, in which students enrich and dignify each other through their work together. The schools value character and leadership highly, recognizing at the same time that these good habits of virtue cannot simply be taught, but must be modeled, reflected upon, and experienced through immersion. Students also profess an honor code that upholds academic integrity, and wear uniforms.

<u>Small Size</u>: A Great Hearts Academy is small, and individual classes are small as well. This limited size guarantees the availability of the individual attention, both academic and personal, that students need to do their best. The overall student-to-teacher ratio on campus is around 15:1, further safeguarding against the anonymity too common to "big box" schools.

<u>A Professionally Diverse and Uniquely Qualified Faculty</u>: The teachers come from a variety of backgrounds: traditionally trained public school teachers are a minority of the faculty. Faculty members are drawn from technical and professional fields, from private or non-traditional school teaching, and from academia (college teaching, graduate schools). Of central importance are the teacher's own love of learning and knowledge of academic subject matter. The teacher must be fundamentally Socratic in his/her approach to students. His/her teaching activity is aimed at eliciting new thoughts and ideas in the learners, and not simply at filling them with information. He/she must fully embrace the school's vision of community, of learning, and of leadership.

<u>Visible Leadership</u>: The head of a Great Hearts Academy must possess the virtues of the best teachers and administrators by overseeing all the functions of the schoolacademic, social, fiscal, and physical. He/she mentors and collaborates with the

### REVISED DURING CONTINGENCY PROCESS SEE INSERT

teachers, and is open to learning alongside the school's students. The head of school is a model of collegiality, fairness, clarity, responsibility, and a love of learning.

<u>Family Involvement</u>: Like students and teachers, the parents are invited to embrace and participate in the school's academic and ethical vision. Parents love and pursue the true, the good, and the beautiful, and they support and inspire their children to do the same. As the central adult role models and teachers in their own children's lives, parents can apprehend the greater significance of the school's vision, and the long-lasting value of such an education, and they can support their daughters and sons in their journey towards it. Volunteerism is vital to the school's prosperity.

### 3. Community Support

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GreatHeal

a) Describe the community where the school will be located and explain why this location was selected. Include the types of resources available in the community.

Great Hearts America—Texas plans to open five to ten schools in the Greater San Antonio area. Similar to the portfolio of Great Hearts in Arizona, the Great Hearts America—Texas schools would serve a diverse demographic, with some schools serving majority Free and Reduced Lunch qualifying students. Each new academy will be named Great Hearts America – "insert community name."

Great Hearts America—Texas seeks to open its first San Antonio school on north side of town, close to the downtown area in order to provide ample access to the school for the surrounding San Antonio communities. The parent demand is high for this location is high as evidenced by the February 2012 public hearing- community open house.

b) Provide information on the manner in which community groups have been involved and will continue to be involved in the charter school planning process. Include the type of community groups and the type of services they will provide.

Great Hearts America—Texas consulted with a diverse group of community members in San Antonio to ensure that issues in planning the school were considered from multiple perspectives and that questioning, challenging, constructive feedback, monitoring, and authentically useful comments were an integral part of the planning process.

Great Hearts America—Texas held a public hearing-community open house in early February to gauge interest. Additionally, Great Hearts America—Texas developed relationships with the following San Antonio organizations: The Brackenridge Foundation, The Ewing Halsell Foundation, Edvance and KIPP San Antonio. The Brackenridge Foundation and The Ewing Halsell Foundation have made pledges totaling approximately \$3 million dollars to support and partially fund the Great Hearts expansion into San Antonio.

c) Submit, as Attachment A, a copy of the published notice of public hearing, clearly showing the name of the newspaper and date of publication. The notice should include the proposed school name, the sponsoring entity name, date, time, place of meeting, and the names of sponsoring entity board members. Any application that provides only Vision of the School (p. 7) – Confirm your understanding that, in accordance with 19 Texas Administrative Code (TAC), § 100.1151, a criminal history background check must be conducted on any individual that volunteers to work with students in any capacity.

Great Hearts understands that, In accordance with 19 Texas Administrative Code (TAC) §100.1151, a criminal history background check must be conducted on any individual that volunteers to work with students in any capacity.

## Community Support (p. 7) – Address question 3a by providing a description of the community and why it was chosen.

Great Hearts is currently evaluating several locations for potential campuses on the north side of San Antonio. The primary criteria used to determine the best location of the first school consist of high levels of community response demanding a comprehensive, classical liberal arts public school and broad access to a range of communities. We are thus exploring available sites north of the 410 loop and along the I-10, 281, and I-35 corridors.

### Community Support (p, 2) – Confirm your understanding that, under federal law, transportation must be provided to students with special needs as identified in the students individualized Education Program (IEP).

Great Hearts understands that, under federal law, transportation must be provided to students with special needs as identified in the students' Individualized Education Plans (IEP).

APPROVED DURING CONTINGENCY PROCESS

evidence of publication in electronic media will result in this item being considered incomplete and the removal of the application from the process. Attachment A contains a copy of the published notice of public hearing published in the San Antonio Express on Tuesday, January 31, 2012. The notice is outlined in red.

d) Provide the number of community members, not affiliated in any way with the sponsoring entity or the proposed charter school, who attended the public hearing.

Great Hearts America provided a sign in sheet to document the number of attendees. Sixty-five community members attended the public hearing that were not affiliated with Great Hearts America – San Antonio. The sign sheets are include in **Attachment B**.

e) Submit, as Attachment B, a synopsis of the public hearing held to discuss the proposed charter school plan. The synopsis must identify presenters, provide a summary of their comments, and a list of questions from participants with responses provided by the presenters. Do not include slides of the presentation or a transcript of the proceedings.

Attachment B contains a synopsis of the public hearing held to discuss the proposed charter school plan.

### 4. Student Goals

- a) Other than the indicators of the state accountability rating and accreditation systems, outline and discuss specific measurable student goals in each of the following areas:
  - Student progress over time
  - Student engagement (i.e. attendance, continuous enrollment in school); and
  - Readiness for postsecondary success.

### Student progress over time

Prior to the start of school, faculty will administer readiness tests in math, reading, and writing to identify areas of proficiency or deficiency of individual students as well as any overall challenges for the entering class. Test results will allow teachers to gear their instruction to the appropriate level and to anticipate challenges, as well as to create academically balanced class sections.

Homework is an essential part Great Hearts approach, and thus will be a primary source for the assessment and evaluation of student progress. Kindergarten students will average 15 to 30 minutes per evening, rising to one to one-and-a-half hours for fifth-graders, two hours a night for 8<sup>th</sup> graders, and three hours a night for all high school students.

Benchmark test based on the TEKS results will enable teachers to place students in achievement-level groups, and regular assessments will enable them to move to higher

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or lower-level groups. Students will take summer school catch-up classes to move those who enter Academy below grade level up to grade level during their first year-and-a-half in the school.

### STARR Performance Objectives

REVISED DURING CONTINGENCY PROCESS SEE INSERT

Great Hearts America students in grades 3-8 will meet the following state accountability performance objectives on the STAAR test:

Performance Objectives	2013-14	2014-15	Measurement			
X% of all 3 <sup>rd</sup> -8 <sup>th</sup> students will meet the "pass score" standard on the reading /or ELA section of STARR	80%	90%	STARR, STARR L, STARR Alternative, Benchmark Tests, Unit Tests, Teacher Grades			
X% of all 3 <sup>rd</sup> -8 <sup>th</sup> students will meet the "commended performance score" standard on the reading /or ELA section of STARR	25%	35%	STARR, STARR L, STARR Alternative, Benchmark Tests, Unit Tests, Teacher Grades			
X% of grades 4 <sup>th</sup> and 7 <sup>th</sup> grade students will meet the "pass score" standard on the writing section of STARR	80%	85%	STARR, STARR L, STARR Alternative, Benchmark Tests, Unit Tests, Teacher Grades			
X% of grades 4 <sup>th</sup> and 7 <sup>th</sup> grade students will meet the "commended performance score" standard on the writing section of STARR	25%	35%	STARR, STARR L, STARR Alternative, Benchmark Tests, Unit Tests, Teacher Grades			
X% of 3 <sup>rd</sup> -8 <sup>th</sup> students will meet the "pass score" standard on the math section of STARR	80%	90%	STARR, STARR L, STARR Alternative, Benchmark Tests, Unit Tests, Teacher Grades			
X% of 3 <sup>rd</sup> -8 <sup>th</sup> students will meet the "commended performance score" standard on the math section of STARR	25%	35%	STARR, STARR L, STARR Alternative, Benchmark Tests, Unit Tests, Teacher Grades			

End of course performance objectives follow:

**Great**Hearts

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Performance Objectives	2013-14	2014-15	Measurement
X % of 9 <sup>th</sup> grade students will meet the "pass score" standard on the Algebra 1, English 1, Biology and	80%	90%	STARR EOC, STARR L EOC, STARR

## APPROVED DURING CONTINGENCY PROCESS

Student Goals (p. 9) – Describe how this program will be funded (Section 4.a). Clarify if the revenues and corresponding expenditures for summer school were included in the year one budget (Attachment O), or explain why the revenues and expenditures were not included.

Such summer school classes will be voluntary, with any incremental costs associated with the courses being covered through minimal tuition (free for qualifying students) charged to the families who choose to participate.

Performance Objectives	2013-14	2014-15	Measurement
World Geography end of course exams.			Alternative EOC
X% of 9 <sup>th</sup> grade students will meet the "commended performance score" standard on the Algebra 1, English 1, Biology and World Geography end of	25%	35%	Subject specific STARR EOC, STARR L EOC, STARR Alternative EOC
X% of 10 <sup>th</sup> grade students will meet the "pass score" standard on the Geometry, English II, Chemistry and World History end of course exams.	80%	90%	Subject specific STARR EOC, STARR L EOC, STARR Alternative EOC
X% of the grade 10 students will meet the "commended performance score" standard on the Geometry, English II, Chemistry and World History end of course exams.	25%	35%	Subject specific STARR EOC, STARR L EOC, STARR Alternative EOC

As grades levels are added, all Great Hearts America—Texas high school students will take 12 STAAR end-of-course assessments developed in the following foundation subjects:

Math	English	Science	Social Studles		
Algebra I	English I (R & W)	Biology	World Geography		
Geometry	English II (R & W)	Chemistry	World History		
Algebra II	English III (R& W)	Physics	U.S. History		

In addition to state accountability expectations, Great Hearts has the following academic goals:

- 1. By 5th grade, 100% students will be reading above grade level
- 2. By the end of the school year, 90% of all fifth graders will pass the Great Hearts Pre-Algebra Readiness Test
- 3. By the end of the school year, 90% of all eighth graders will pass the Advanced Algebra Readiness Test
- SAT and ACT averages for 11<sup>th</sup> graders will be 20% or more above national averages.
- 5. 100% of graduates will attend college.

### Student engagement (i.e. attendance, continuous enrollment in school)

Goal 1: Average daily attendance will be 95% of average daily membership.

Goal 2: 90% of the students will be continuously enrolled in grades K-8

Student attendance and retention is strong at all current Great Hearts schools Great Hearts America—Texas seeks to mitigate the risks of controllable attrition following the Great Hearts Arizona model. At most Great Hearts schools, retention is well over 90% annually, and daily attendance averages over 95%.

Additionally, Great Hearts annually surveys its students and publishes results of this survey to its parents and to the public.

### Readiness for postsecondary success

Great Hearts America—Texas schools are designed for student to obtain maximum success upon high school graduation. Great Hearts Academy Arizona students score well on standardized tests such as the SAT and ACT, perform well in National Merit competition, and have the opportunity to attend some of the finest colleges and universities.

For example, for the Great Hearts Arizona Class of 2011 Great Hearts Academies:

- The National Merit Foundation named 17% of graduates commended or better and 9% were National Merit finalists.
- The SAT average for each subtest was 600+
- The ACT average was 27.9
- 100% of graduates were accepted to colleges, including Baylor, Cornell, Harvard, Pepperdine, UCLA, and the University of Texas.
- b) Describe methods used to measure success toward each goal.

The learning culture at Great Hearts America—Texas will be evidence and data-driven. The school will use assessments to document progress and to examine individual students' academic gains. Based on the data, Great Hearts America—Texas faculty will modify teaching strategies to address students' learning needs, and administrators will adjust instructional leadership, as needed. As interim data is available, teachers will analyze it in order to make adjustments in their instructional practices to ensure that all students are progressing toward mastery. Faculty and administrators will meet quarterly to report and analyze data and decide how to change or share instructional strategies.

Furthermore, Great Hearts America—Texas will place great emphasis on the narrative method of student evaluation, which includes a rigorous analysis of all aspects of a student's work including participation, attitude, homework, quizzes, and tests. The parents and students receive a collection of pages of meaningful narrative on the student's comprehensive growth each semester. This narrative method of assessment allows for evaluation of the whole student in a meaningful and individual way.

# Student Goals (p. 11) – State the specific goals to be used to measure readiness for postsecondary success. Include the levels of achievement expected to be accomplished and provide the timeframe for achieving these levels of performance.

Great Hearts America—Texas schools are designed for students to obtain maximum success upon high school graduation. Therefore, Great Hearts sets lofty goals for students on standardized tests such as the SAT and ACT and matriculation into colleges and universities.

These goals include:

- 90% 11<sup>th</sup> graders of meeting the minimum college readiness SAT score of 1550.
- Average SAT scores for 11th graders 20% higher than the national average.
- Average ACT scores for 11<sup>th</sup> graders 20% higher than national average.
- 100% of graduates attending college.
- 60% of students accepted Into "More or Most Selective Colleges" as defined by US World and News Report

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The midyear evaluation will include a conference with the parent and the student's teachers. The emphasis of the parent-teacher conference is on discussion of strengths, areas of interest, accomplishments, and specific areas for improvement.

# c) Describe the ways in which the school and community members will work together to ensure continuous academic growth for all students.

The Great Hearts America—Texas School Board in San Antonio will consist of community members and holds the Head of School accountable for assuring the continuous growth of all students. At each board meeting, the Head of School presents the board with "Head of School Report" that includes multiple pages of academic data and narrative. Additionally, Great Hearts publically publishes school data and aggregate results on its website (in a "Quarterly Report") so that parents can compare the Great Hearts schools to each other and also to other local schools.

### 5. Educational Plan

a) Describe the educational program to be offered, including special education and bilingual education/English as a second language (BE/ESL). Clearly state that each grade level will incorporate the Texas Essential Knowledge and Skills (TEKS).

Great Hearts Academy Arizona has proven that its academic program and culture of achievement is scalable and that it can deliver on its academic achievement goals.

Great Hearts America – Texas full expects to meet and or exceed Texas state standards with our curriculum with an alignment between what is to be taught based on the TEKS and what is tested for a given course of study. Each grade level will incorporate the Texas Essential Knowledge and Skills (TEKS).

In preparation for our entry into Texas, we analyzed the Great Hearts America – Texas K-12 curriculum to assure that each grade level incorporates the *Texas Essential Knowledge and Skills (TEKS)*. We recognize that a thorough understanding of the tested TEKS and how they are tested on STARR is essential for student success in the classroom, on state assessments, and as reflected in the state and federal accountability systems.

Consistent with a growing national consensus on the need to provide a more clearly articulated K–16 education program that focuses on fewer skills and addresses those skills in a deeper manner, the Great Hearts Academies requires a common and rigorous sequence of courses for all students; there are no electives. The sequence in math, science, foreign language, fine arts, and the perennial and timeless humanities exceeds the state in duration and content.

### The Great Hearts Educational Program

The primary goal of Great Hearts America—Texas is to graduate thoughtful leaders of character who will contribute to a more philosophical, humane, and just society. To

reach this goal, each student must freely discern his or her unique character and destiny during the program. Liberal education should bring each student to ask: what amongst the array of offerings and invitations spread before me in the future do I find meaningful? Graduates will then apply that confident self-understanding for a greater good beyond themselves. Each academy strives to create an environment in which durable character, and the open search for it, is modeled and highly regarded. Great Hearts believes that academic accomplishment is a natural byproduct of a preparatory school culture that first values integrity, personal responsibility, and thoughtful self-reflection.

The following features are essential to America -our model:

<u>A Core Liberal Arts Curriculum</u>: A Great Hearts Academy requires a common and rigorous sequence of courses for all students; there are no electives. The sequence in math, science, foreign language, fine arts, and the perennial and timeless humanities exceeds the state standards in duration and content. All students graduate as critical thinkers, coherent writers, and confident speakers. At the high school level, 24.5 high school credits are required for graduation (above the state required 24) so that all students who graduate are eligible for admissions to the finest colleges and universities in the nation.

<u>An Academy Ethos</u>: A community of students working together in pursuit of the school's lofty vision is an essential feature of a Great Hearts Academy. Students are invited and exhorted to create a community of scholarship, leadership, and service in their classrooms, in extracurricular activities, and in their relationships with peers and teachers. These academies strive to foster friendship of the noblest sort: friendships marked by a common love of the true, the good, and the beautiful, in which students enrich and dignify each other through their work together. The schools value character and leadership highly, recognizing at the same time that these good habits of virtue cannot simply be taught, but must be modeled, reflected upon, and experienced through immersion. Students also profess an honor code that upholds academic integrity, and wear uniforms.

Small Size: A Great Hearts Academy is small, and individual classes are small as well. This limited size guarantees the availability of the individual attention, both academic and personal, that students need to do their best. The overall student-to-teacher ratio on campus is around 15:1, further safeguarding against the anonymity too common to "big box" schools.

<u>A Professionally Diverse and Uniquely Qualified Faculty</u>: The teachers come from a variety of backgrounds: traditionally trained public school teachers are a minority of the faculty. Faculty members are drawn from technical and professional fields, from private or non-traditional school teaching, and from academia (college teaching, graduate schools). Of central importance are the teacher's own love of learning and knowledge of academic subject matter. The teacher must be fundamentally Socratic in his/her approach to students. His/her teaching activity is aimed at eliciting new thoughts and ideas in the learners, and not simply at filling them with information. He/she must fully embrace the school's vision of community, of learning, and of leadership.

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**Great**Hearts

Education Plan (p. 13) – Confirm your understanding that the placement of special education students cannot be predetermined and that the charter will offer a full continuum of special education services.

Great Hearts understands the placement of special education students cannot be predetermined and will offer a full continuum of special education services.

APPROVED DURING CONTINGENCY PROCESS

<u>Visible Leadership</u>: The headmaster of a Great Hearts Academy must possess the virtues of the best teachers and administrators by overseeing all the functions of the school- academic, social, fiscal, and physical. He/she mentors and collaborates with the teachers, and is open to learning alongside the school's students. The head of school is a model of collegiality, fairness, clarity, responsibility, and a love of learning.

<u>Family Involvement</u>: Like students and teachers, the parents are invited to embrace and participate in the school's academic and ethical vision. Parents love and pursue the true, the good, and the beautiful, and they support and inspire their children to do the same. As the central adult role models and teachers in their own children's lives, parents can apprehend the greater significance of the school's vision, and the long-lasting value of such an education, and they can support their daughters and sons in their journey towards it. Volunteerism is vital to the school's prosperity.

Please note the following program overview for Great Hearts America. Where necessary, modifications to this program will be made to meet Texas laws, incoming student achievement level, and community interests; such alterations and modifications will be described in full in the charter application.

The overview of the Great Hearts K-12 Curriculum follows:

## Great Hearts K-12 Curriculum Overview

	ĸ	1st	2nd	3rd	4th	5th	6th	7th	8th	Sth	10th	11th	12th
	Rigg	s Phon	ics, Sp	elling i	& Vocat	nulary				1			
English	Touchstones Great Books							Literature & Composition					
English	Reading & Literature						Literature of composition			Humane Letters:	Humane Letters:	Humane Letters:	Humane Letters:
	Grammar & Composition									American Tradition	Modern Europe	Ancient	Rome to Modernity
History			nericar History		ry / ography	r	Intro to the American Tradition	Ancient History	Medieval History	Haununt	cuope	Greece	MUGELLIN
Math	Singapore Math						Pre- Algebra	Algebra I	Algebra I / II	Geometry	College Algebra / Trig	Cak	culus
Science		Core Science					The Nature of Science	Life Science	Earth Science	Biology	Physics I	Physics II	Chemistry
Foreign anguage	Spanish / Latin							Latin		Adv Latin or Mod Lang I	Adv Latin or Mod Lang II	Greek I or Mod Lang III	Greek II or Mod Lang
ine Arts	Choral Music						Intro to Fine Music & Studio Art Arts		Music & Poetry		Studio Art & Drama		
ane Ans	Crafts & Studio Art												
Other		Competitive Study Skills Chess Workshop							Economics	College Admissions 101	Senior Thesis		
Physical ducation									Co	ompetitive Athlei	tics		

### **Special Needs Students and Programs**

Great Hearts America—Texas Board of Directors will ensure that all children with disabilities enrolled in Great Hearts, including children with disabilities who are homeless or wards of the State, and children with disabilities attending private schools or who are home schooled, and who are in need of special education and related services are identified, located, and evaluated.

A free appropriate public education (FAPE) will be available to all children. Great Hearts America will make the determination that a child is eligible for special education and related services on an individual basis by a properly constituted ARD committee.

The Headmaster will sign the required special education assurance statement and will have special education policies and procedures that comply with all federal and state requirements in place upon opening. Upon approval of the Texas Open Enrollment Charter Application, the Great Hearts will electronically submit the board approved policies and procedures through the online Legal Framework website. The special education policy and procedures will be developed using a variety of resources including Region 20 ESC and special education consultants with a documented history of success. The charter school's Board of Directors will ensure that it will comply with all state and federal requirements. Special Education Certified Instructional Staff (appropriately certified in the State of Texas) will be recruited and employed or contracted to provide services as required by the ARD committee meeting for each special education eligible student. The special education endorsed teacher will be available to develop, participate and implement the IEP.

A full array of services with appropriately certified personnel will be available as required by ARD committee decision. Paraprofessionals who have received additional special education training with SBEC certification may be used by the school to carry out responsibilities, supervised by the special education certified teacher. These paraprofessionals may work individually with a student or to provide instruction according to the IEP's of students to work with small groups of students on tasks or in conjunction with lesson plans determined by the special education certified teacher.

Related service personnel will be appropriately certified and/or licensed personnel providing related services to special education students such as physical therapy, occupational therapy, speech therapy, music therapy, counseling services or mobility services. They will be recruited and contracted to provide services on an "as-needed" basis as determined by the ARD committee.

Assessment personnel will be appropriately certified and/or licensed to provide assessment and evaluation services to special education students through assessment, scoring, report writing and attendance in ARD meetings. Assessment personnel will be recruited and contracted to provide services on an "as-needed" basis as determined by the ARD committee.

The charter school will provide a full continuum of services for students who are served through special education according to the needs described in the student's ARD document. Services may include the following instructional arrangements:

<u>Mainstream class</u>: The general curriculum is addressed for students in this setting with accommodations and/or modifications as determined by the ARD committee. The special education certified teacher monitors student progress and consults with the regular classroom teacher to ensure that academic progress is being made. In the event that progress is deterred, the special education teacher schedules an ARD committee meeting to review the student's program.

<u>Resource class</u>: Students whose educational plan requires modification in the general curriculum are assigned to this class by the ARD committee for specific subject areas requiring specialty services or materials to address the student's handicapping condition. Students receive instruction by the certified special education teacher in this setting for the amount of time established in the ARD meeting.

<u>Content mastery</u>: Students whose handicapping condition indicates a possible need for special assistance in completing assignments from the general education classroom attend the resource class as designated by the ARD committee. This includes administration of an exam orally or with open book, or other modifications that would disturb the learning environment of the regular classroom; it also includes provision of specialty materials or services that allow a special education student to be successful in the general curriculum.

An incoming student's IEP will be reviewed within 30 school days. The special education coordinator at the school will contact the previous school and records will be requested. Until records are received a temporary ARD is scheduled and the previous school services are replicated as deemed appropriate by the temporary ARD Committee.

Temporary goals and objectives are determined based on all available data pending receipt of records from the previous school. A review ARD is held within 30 school days, where the most recent FIE is reviewed by the committee and a determination of instructional setting, goals, objectives, and accommodation/modifications is made. If the coordinator receives a FIE that is out of date, or if it is impossible to obtain a copy of the FIE from the previous school within a 30 school day time period, the parent will be notified, consent will be obtained, notice will be provided and the student will be re-evaluated by the school evaluation staff.

### **Dyslexia and Other Related Disorders**

The Great Hearts America—Texas Board of Directors will ensure that procedures for identifying a student with dyslexia or a related disorder and for providing appropriate instructional services to the student are implemented at the charter school.

#### Bilingual English as a Second Language

The Great Hearts America—Texas Board of Directors will ensure that procedures for identifying a student with Limited English Proficiency (LEP) and for providing appropriate instructional services to the student by a state certified ESL teacher are implemented at the charter school. Other (p. 16) – Confirm your understanding that bilingual/ESL teachers must be certified. Great Hearts understands that bilingual/ESL teachers will be certified.

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Great Hearts America—Texas will provide English Language Instruction through the development of Individual Language Learner Plans (ILLP) created for each English Language Learner (ELL) and implemented in the Mainstream Classroom. ILLP must meet scheduling and time allocations. The ILLP will be written after consultation with the LPAC team comprising of parent/guardian, classroom English/language arts teacher, ELL coordinator and a site administrator. The plan will be signed by all parties on the team and will be made available to the classroom teacher for implementation in the general education setting. A copy of such plan will be placed in the student's ELL and cumulative files for documentation, compliance, and accountability purposes, and for review by other classroom teachers of the English language learner. All ELLs are to be provided with appropriate daily English language development and instruction.

b) Describe the connection between the TEKS, classroom instruction, and assessment of student progress and provide three specific examples of the ways that the TEKS and the assessment of the TEKS will be incorporated into classroom instruction. In addition, specifically address each of the following:

The TEKS will drive the Great Hearts America – Texas curriculum and classroom instruction and the STARR will be one of several measures to be used to assess student progress. The Texas Great Hearts Academies Curriculum basic components serve as examples of the way the TEKS and the assessment of the TEKS will be incorporated into the classroom:

- Written Curriculum The written curriculum is based on the TEKS. The Great Hearts scope and sequence and other written materials are aligned with the TEKS will be used to determine and support what is taught.
- Tested Curriculum The tested curriculum are the segments of the curriculum tested by the Texas state mandated tests, STARR, benchmark assessments, teacher made assessments, etc that are aligned with the TEKS.
- Taught Curriculum The taught curriculum is the curriculum implemented by Great Hearts Academy teachers to ensure mastery of the essential knowledge and skills. Teaching of the curriculum is based on promising practices that are supported by research and are aligned to the TEKS.

Describe the manner in which the science curriculum will meet the 40% laboratory and field investigation requirement for middle and high school courses.

In science, students study physical, earth and life sciences in the junior high before embarking on four years of required laboratory science (two years of physics, one year of biology, and one year of chemistry). At the primary school level, all K-5 students study generalized science in each year, following the Core Knowledge Scope and Sequence (modified to meet TEKS). All great Heart Academy science courses require over 40% laboratory in addition to classroom experiences and field investigation.

Describe the educational program and the setting that will be used to offer courses to meet the requirements for physical education.

Other (p. 17) – Confirm your understanding that the charter will follow state law concerning bilingual/ESL and may be required to offer bilingual classes in accordance with TEC, Chapter 29.

Great Hearts understands that the charter will follow state law concerning bilingual/ESL and may be required to offer bilingual classes in accordance with TEC, Chapter 29.

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Using the following guidance, <u>Texas Essential Knowledge and Skills for Physical</u> <u>Education 19 TAC Chapter 116</u> and <u>TEAtac/chapter074/ch074a Rules</u>, Great Hearts will deliver the TEKS and meet minimum requirements for each content area.

# Describe the educational program and the setting that will be used to offer courses to meet the requirements in fine arts.

Great Hearts students will exceed the fine arts requirements as stated by the TEA and will meet or exceed the required TEKS in each discipline. Each student will take thirteen years of fine arts, including classes in poetry, drama, studio art, music theory, recorder and choir in an elective format. The curriculum will be supplemented with experiences outside the classroom that are designed to enhance our students' understanding and appreciation for the lessons of the core courses.

c) Describe how the teaching methods to be used will provide a rigorous and relevant academic program and state the reasons for choosing them, explaining how the methods enhance student learning and promote high expectations for all students. Include information about materials, strategies, techniques, and procedures to be used to meet the needs of the student population, including students with disabilities and those requiring BE/ESL services, and clearly state the number of instructional hours per day that will be afforded to students.

### Teaching Methods, Materials, Strategies, Techniques and Procedures

<u>Direct Instruction</u>: Though primarily employed at the K-5 level, all classes at Great Hearts utilize Direct Instruction methods, wherein the delivery of content comes principally from the instructor of the course. This is the primary delivery at the K-5 level, where desks are organized traditionally, in rows facing forward, and teacher-driven instruction is employed with much more frequency than group work or project work.

<u>Socratic Method:</u> Great Hearts students will receive *X* instructional hours per day and courses at the Academy will be taught employing the Socratic Method, which develops thinking, speaking, and reading skills. It is incorporated within the curriculum as a method to increase student involvement. With the Socratic Method, students are actively involved in *discovering* truths, rather than being informed through lectures in class or readings in textbooks. The teacher's responsibility is to create the right questions for discussion. Students find the answers within their reading and reflective activities.

The Greek philosopher Socrates was convinced that the surest way to attain reliable knowledge was through the practice of disciplined conversation, which he called dialectic. A Socratic Seminar is a method to try to understand information by creating dialectic in regards to a specific information source. In a Socratic Seminar, participants seek deeper understanding of complex ideas in the material through rigorously thoughtful dialogue, rather than by memorizing bits of information. A Socratic Seminar opens with a question either posed by the leader or solicited from participants as they acquire more experience in seminars. An opening question has no right answer; instead, it reflects a genuine curiosity on the part of the questioner. A good opening question leads participants back to the text as they speculate, evaluate, define, and clarify the

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## Education Plan (p. 18) – Describe the educational program and setting that will be used to offer courses to meet the requirements for physical education.

<u>Physical Education:</u> Every Great Hearts student will participate in Physical Education classes and competitive athletics during their time at Great Hearts, including taking a physical education class in high school that meets the requirements for graduation. Physical education at Great Hearts will complement the intellectual rigor of the classroom by instilling in students the equally important component of living an active and healthy lifestyle. All lessons and activities will follow Texas Essential Knowledge and Skills requirements, with appropriate equipment, for each grade level, while also reinforcing the virtues and character-building focus of the Great Hearts curriculum, emphasizing fair play, honesty, integrity, and sportsmanship in an age-appropriate and friendly competitive atmosphere.

Instructional Hours (p. 18) – Explain the apparent contradiction between the statement, "Great Hearts students will receive 7.5 instructional hours per day..." with the statement, "Almost all of our schools are 8:30 to 3:00pm" that equates to 6.5 hours on P. 70.

Great Hearts students will receive 6.5 hours of instruction each day, excluding lunch, passing periods, and other non-Instructional time.

### Instructional Hours (p. 18) – Clearly state the number of Instructional hours to be provided each day excluding lunch, passing periods and other non instructional time.

Great Hearts students will receive 6.5 hours of Instruction each day, excluding lunch, passing periods, and other non-instructional time.

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issues involved. Responses to the opening question generate new questions from the leader and participants, leading to new responses. In this way, the line of inquiry in a Socratic Seminar evolves on the spot rather than being pre-determined by the leader. In a Socratic Seminar, the leader plays a dual role as leader and participant. The seminar leader consciously demonstrates habits of mind that lead to a thoughtful exploration of the ideas in the text by keeping the discussion focused on the text, asking follow-up questions, helping participants clarify their positions when arguments become confused, and involving reluctant participants while restraining their more vocal peers.

<u>Great Books</u>: Although some lecture and textbook reading may be incorporated as part of some courses, the main focus of all classes is the Great Books program, where the focus is on shared inquiry and active learning of the Great Ideas as expressed in the Western canon. The teacher acts as a guide in this process, asking key questions that will lead the learners to individual and communal discoveries of information, concepts, and skills. The Academy believes this to be the most effective method of teaching, since through this approach the students are primarily responsible for their own learning. Such responsibility serves to both increase student interest in the topics studied and promote long-term retention of the material covered.

# Materials, strategies, techniques, and procedures to be used to meet the needs of students with disabilities and those requiring BE/ESL services.

Materials, strategies, techniques, and procedures to be used to meet the needs of the student population, including students with disabilities and those requiring BE/ESL services, will be peer reviewed and the number of instructional hours per day that will be afforded to students is based on the students IEP and for ESL services English proficiency level and Texas state law.

d) Describe the planned academic assessment program, including the process to be used to determine baseline achievement levels of students and the methods of measurement to be used.

Initial assessment begins when students enter the Academy. Placement tests in writing, reading, and mathematics are used by the faculty to identify areas of proficiency/deficiency of individual students as well as any overall challenges for the entering class. Test results allow our teachers to gear their instruction to the appropriate level and to anticipate challenges, as well as to create academically balanced sections. Academic counseling will be offered for any student who transfers to the school as a high school student in order to advise each transfer student of the appropriate preparation for the curriculum. Tests used include baseline Stanford 10, Singapore Math placement tests, middle school math readiness tests, reading level tests, and composition proficiency tests

The process of assessment is ongoing as student-based evidence guides our instruction. Additional measures of progress follow:

<u>Homework</u>: Homework is an essential part of preparatory studies and as such is a primary source for the assessment/evaluation of student progress. Homework is a time

of quiet concentration in which the student truly makes the subject his or her own, and regular assignments reserve class time for instruction, discussion, dialogue and the collective pursuit of truth. Although study habits of individual students vary widely, students should be prepared for homework each night. High school students should expect up to three hours of homework a night, middle school students should expect two hours of homework a night and primary school students up to an hour and a half by 5<sup>th</sup> grade.

<u>Student Evaluation</u>: We place great emphasis on our method of student evaluation that includes a rigorous analysis of all aspects of a student's work including participation, attitude, homework, quizzes, and tests. For the first quarter of each semester, faculty produce a half-sheet document for each course for each student that indicates an overall grade and objective breakdown of different evaluative areas along with a narrative summary of the student's progress. At the end of each semester, faculty produce a one-page document for each course for each student that offers a detailed narrative of the student's achievements in categories such as sense of wonder and depth of inquiry, attitude, participation, essays, tests, quizzes, homework, special projects, and presentations. It is our explicit intention to de-emphasize letter grades in our community of learners, and we believe that the narrative method of assessment allows us to evaluate the whole student in a meaningful and individual way.

Parent-Student-Teacher Conferences: At mid-year, the evaluation will also include a conference with the parent and the student's teachers. 11th and 12th graders are required to attend the conferences and engage in substantial self-assessment. 10th graders are encouraged to attend and participate. The emphasis of the parent-student-teacher conference will be on discussion of strengths, areas of interest, accomplishments, and specific areas for improvement.

<u>Final Assessment/Evaluation</u>: The final level of assessment/evaluation of student progress and effectiveness of the curriculum will be accomplished through the administration and review of results from the Texas Essential Knowledge and Skills (TEKS) Tests.

e) Describe strategies to ensure that the educational program will effectively prepare students to enter kindergarten on or above grade level and ensure a successful transition from prekindergarten into grade school.

Pre-K will not be offered.

f) Describe strategies to be used to prepare all students to meet state graduation requirements, including students with disabilities and those requiring BE/ESL services.

As referenced in previous sections, Great Hearts uses evidence based practices and teaching strategies. In addition, the use of a variety of types of evaluation to assess student progress and communication of student progress to the student and parents is a key strategy to managing the preparation of students.

Education Plan (p. 20) – Confirm your understanding that parents can be encouraged to attend the Parent-Student-Teacher Conference, but not required.

Great Hearts understands that parents can be encouraged to attend Parent-Student-Teacher Conferences, but not required.

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The delivery of the Great Hearts curriculum based on the TEKS will be used to prepare students to meet graduation requirements:

- Written Curriculum The written curriculum is based on the TEKS. The Great Hearts Academies scope and sequences and other written materials are aligned with the TEKS will be used to determine and support what is taught.
- Tested Curriculum The tested curriculum are the segments of the curriculum tested by the Texas state mandated tests, STARR, benchmark assessments, and teacher made assessments that are aligned with the TEKS.
- Taught Curriculum The taught curriculum is the curriculum implemented by Great Hearts Academy teachers to ensure mastery of the essential knowledge and skills. Teaching of the curriculum is based on promising practices that are supported by research and are aligned to the TEKS.

### **Special Populations**

### g) Discuss the academic and enrichment support that will be provided to engage or reengage students in school.

All teachers are required to tutor multiple times a week, before and after school. In addition, special "labs" exist for group tutoring in the areas of K-5 Phonics, mathematics, foreign language, and writing. Working with students one-on-one or in small groups is the most efficient and effective way for teacher to re-engage struggling students in the academic life of the Academy.

Furthermore, a tuition-based, academically geared after school program (free for qualifying students) exists as a more comprehensive support system.

Finally, Great Hearts provides special readiness classes for new students and students with academic deficiencies.

### b) Discuss the instructional strategies to be used to target college and/or career readiness.

All juniors and seniors will participate in College Admissions 101, which meets three times per semester for two hours during the school day. The college counselor orients the junior class to the college admissions process, and the course includes discussions, lectures, and small group work. The curriculum is constructed by each counselor according to the group needs, but the topics are generally the same: college testing, applications, essay writing, interviews, discovering what they want in a college, what makes a good fit, college visits, etc. Students are regularly given assignments to complete out of class that require a great deal of reflection on personal preferences and interests. The goal of College Admissions 101 is to prepare juniors for the admissions cycle and to support seniors as they go through the cycle. Outside of College Admissions 101, every junior meets with the college counselor individually to discuss

Education Plan (p. 21) – Define the criteria needed for a student to qualify for the after school program referenced in the statement "Furthermore, a tultion-based, academically geared after school program (free for qualifying students) exists as a more comprehensive support system."

All extracurricular programs will be offered at a free or reduced rate for students that qualified for free and reduced lunch through NSLP.

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their needs and concerns. Counselors monitor whether students are on track to register and take the SAT and ACT, answer general questions, and arrange for college representatives to visit the Great Hearts campus.

Great Hearts also operates SAT, PSAT, and ACT preparation classes that meet on Saturdays during the time leading up to each of these tests.

# i) State the maximum teacher-to-student ratio to be maintained by the proposed school and the rationale for maintaining this ratio.

The widely cited research review: The classic Meta-analysis on the relationship of class size and achievement (Glass & Smith, 1978) points to the correlation between small class sizes and academic achievement. The authors collected and summarized nearly 80 studies of the relationship of class size with academic performance that yielded over 700 class-size comparisons on data from nearly 900,000 students. A primary conclusion drawn from this material is that reduced class size can be expected to produce increased academic achievement and that the major benefits from reduced class size are obtained as the size is reduced below 20 students. The effectiveness of small classes is also reported in another study "The Long Effects of Small Classes in the Early Grades: Lasting Benefits in Mathematics Achievement at Grade 9" (Hedges, 2001), which again illustrates that small classes are effective because they provide opportunities for more individualized instruction. The study shows that with small classes, teachers can identify and remedy incipient problems among students at risk for low achievement.

Based on the research and the success of small classes at its sister schools, the Great Hearts academy program has an average 12:1 student-to-teacher ratio. At the K-5 level, there are two full time teachers in every classroom of approximately 28 students. At the middle and high school level, classes are taught by only one teacher, but the average class size is/20 (with a maximum of 25).

### j) Describe any unique curricular experiences to be offered by the proposed school.

### The Great Hearts Curriculum (K-5)

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The comprehensive, research-based core curriculum is balanced between English, history, science, mathematics, foreign language, and fine arts. The curriculum has been used successfully since 2001 at Ridgeview Classical Schools in Fort Collins, Colorado, a public charter school that is consistently ranked among the top public and charter schools in Colorado and the nation. For example, *U.S. News & World Report* ranked Ridgeview Classical Schools as 15th in the country, fourth U.S. charter school, and fourth open-enrollment high school in the nation. Predictive achievement results for Great Hearts—Texas students using this curriculum, which has been adapted to Texas standards, demonstrate that the curriculum and instructional methods enable all students to meet or exceed the Texas state standards. Great Hearts Academies has proven that its academic program and culture of achievement is scalable and that it can

### Teacher to Student Ratio (p. 22) - Clearly state the teacher to student ratio.

Based on the research and the success of small classes at its sister schools, the Great Hearts academy program places two full time teachers in every K-5 classroom for an average student-to-teacher ratio of 15:1, not including specialized teachers such as art and music. At the middle and high school level, classes are taught by one teacher with an average class size is of 20 (maximum of 25). However, because the Great Hearts model employs more teachers than classrooms (to provide scheduled planning periods during each day), the actual teacher to student ratio is 16:1.

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deliver on its academic achievement goals. Great Hearts America—Texas intends to follow suit.

English: Students in grades K-5 will study Riggs phonics, spelling and vocabulary; directed reading and literature; and grammar and composition. In kindergarten through third grade, students cover Riggs Level 1, 2 and 3. Starting in third grade and extending into fourth grade, students study Harvey's Grammar. In fifth grade, students begin their study of middle school grammar with Warriner's. The study of great children's literature and Socratic discussion of that literature is a key instructional tool. Students begin with rudimentary Aesop's fables and leveled readers at the kindergarten level, before moving on to classic children's stories like "Alice in Wonderland," "Robin Hood," "The Phantom Tollbooth," and so forth.

<u>Riggs Phonics, Spelling and Vocabulary</u>: The Riggs method is a multisensory language arts program that establishes high literacy in primary-grade students and helps correct learning disorders. The core of this program is "The Writing & Spelling Road to Reading & Thinking," which begins by teaching the formation of letters via dictated instruction, along with the relationships between sounds and letters, which will lead to understanding of the standard English spelling system. The sound-letter relationships are taught as "explicit" phonics without words, pictures or names of letters, an approach that was recommended by "Becoming a Nation of Readers," a landmark 1985 federal study of reading research. By placing phonics instruction first, completing it quickly and making it multisensory to address multiple learning styles, children rapidly begin to spell, write and read with understanding. The fast pace of Riggs, which helps establish independence, is challenging for students in the primary grades.

In multisensory Riggs instruction, students see the symbol, hear the sound the teacher says, repeat the sound, and write the symbol based on dictated instructions. Thus, students use their stronger learning senses while teachers can remedy the weak ones. Additional methodologies in Riggs are:

- a) <u>Direct Instruction Techniques</u>: demonstrating, working with the teacher, practicing to mastery.
- b) <u>Dictation</u>: Dictation is faster and more effective in developing cognitive skills than copying or completing worksheets.
- <u>Socratic Instruction</u>: Teachers ask rather than tell, which encourages students to think and analyze.
- d) <u>Parsing and Diagramming</u>: Students learn grammar and syntax through composition and by parsing (naming the properties of the parts of speech) and diagramming (deconstructing a sentence graphically into the parts of speech).
- e) <u>Appropriate Sequencing</u>: Students build from one skill to another, starting with speech and oral comprehension. They are given a limited number of concepts at one time and practice these in various ways until they achieve mastery.

As a complete language arts method, Riggs helps children master phonics, letter formation, alphabetic principle, letter-sound awareness, correct spelling, fluent reading, oral and print comprehension, vocabulary, pronunciation, composition, analytical thinking, and auditory-visual-verbal-motor cognitive development.

Riggs is designed to be supplemented by vocabulary-rich literature, which will be provided by the Core Knowledge reading lists.

<u>Touchpebbles and Touchstones</u>: These programs expose young readers to great literature and develop their ability to discuss it respectfully, guided by the teacher. This approach trains students for a Socratic environment in high school, which is a feature of Great Hearts academies. Students in Touchpebbles (grades 2-3) and Touchstones (grades 4-5) will develop students' abilities to analyze what they read in literature, express their ideas effectively through speaking, listen to others, and evaluate others' ideas with civility. Examples of literature that Archway Scottsdale students will read are "Don Quixote," "Gulliver's Travels," "King Arthur," "Narrative of the Life of Frederick Douglass," "Pollyanna," "Rip Van Winkle," "Robin Hood," "Robinson Crusoe" and "Treasure Island."

<u>Modern Languages</u>: The school's Spanish-language curriculum is an immersion-based six-year program. Students learn the grammar and vocabulary of Spanish so they can read, analyze, and discuss great works of Spanish literature. Through literature, the students can experience Spanish in its finest and most beautiful presentation, as well as learning more about the cultures and histories of Spanish-speaking peoples. For this reason, all classes are conducted entirely in Spanish, and students are required to participate frequently so they can build the communication skills needed to interact with literary texts in Spanish.

<u>History</u>: Students will take American History, World History and Geography. American history is emphasized at every grade level, with a different global emphasis at each grade level.

<u>Math</u>: Students at Great Hearts America—Texas classical academies will take six years of Singapore mathematics: All kindergarten students will enter in Singapore K or Singapore 1, and all fifth-grade students will graduate having completed Singapore 5 or Singapore 6.

<u>Science</u>: Students will take five years of core science. The curriculum is a general science curriculum, but with specific areas of focus at each grade level. For example, astronomy is a particular area of focus in first and third grade. Electricity and magnetism are emphasized in first, second and fourth grades. Human body systems and anatomy are emphasized at every grade level.

<u>Foreign Language</u>: All Academy students will take Spanish for six years in an immersion-based learning environment.

<u>Fine Arts</u>: Each student will take six years of fine arts, which will include choral music, plus crafts and studio art at all grade levels. In kindergarten through second grade, the emphasis is on introducing students to master works in art and music. In the third grade, a special emphasis is placed on American Indian, Roman, and Byzantine art. In fourth grade, students study the art of the middle ages, Islamic, Chinese, and African art. In fifth grade, the emphasis is on Renaissance art, 19th century American art, Japanese art, and American spirituals.

The curriculum will be supplemented with experiences outside the classroom that are designed to enhance students' understanding and appreciation for the lessons of the core courses. Each grade level will have at least one major field trip per year.

#### Prep Curriculum (6-12)

<u>Core Curriculum</u>: Great Hearts will employ one of the most well-known core curriculum concepts as its main instructional methodology, which has four characteristics:

- Solid Although ideas come and go, there is a body of lasting knowledge that is to be taught to all children.
- Sequenced: Children learn new knowledge by building on what they already know.
- Specific The course outlines clearly specify what is important in language/arts, history/geography, math, science, and the fine arts. This presents the answers to "what our children need to know."
- Shared This builds on the belief that cultural diversity depends on shared knowledge. The Core Curriculum is standard across the Great Hearts Academy network, ensuring that the approach is tested, comprehensive, and reliable.

Socratic Seminar Method: The Greek philosopher Socrates was convinced that the surest way to attain reliable knowledge was through the practice of disciplined conversation, which he called dialectic. A Socratic Seminar is a method to try to understand information by creating dialectic in regards to a specific information source. In a Socratic Seminar, participants seek deeper understanding of complex ideas in the material through rigorously thoughtful dialogue, rather than by memorizing bits of information. A Socratic Seminar opens with a question either posed by the leader or solicited from participants as they acquire more experience in seminars. An opening question has no right answer; instead, it reflects a genuine curiosity on the part of the questioner. A good opening question leads participants back to the text as they speculate, evaluate, define, and clarify the issues involved. Responses to the opening question generate new questions from the leader and participants, leading to new responses. In this way, the line of inquiry in a Socratic Seminar evolves on the spot rather than being pre-determined by the leader. In a Socratic Seminar, the leader plays a dual role as leader and participant. The seminar leader consciously demonstrates habits of mind that lead to a thoughtful exploration of the ideas in the text by keeping the discussion focused on the text, asking follow-up questions, helping participants clarify

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their positions when arguments become confused, and involving reluctant participants while restraining their more vocal peers.

<u>The Great Books</u>: Although some lecture and textbook reading are incorporated as part of each class, the main focus of all classes is the Great Books program, where the focus is on shared inquiry and active learning of the Great Ideas as expressed in the Western canon. The teacher acts as a guide in this process, asking key questions that will lead the learners to individual and communal discoveries of information, concepts, and skills. The Academy believes this to be the most effective method of teaching, since through this approach the students are primarily responsible for their own learning. Such responsibility serves to both increase student interest in the topics studied and promote long-term retention of the material covered.

Classical Languages: The Great Hearts classical languages curriculum is a seven-year program in which Latin I, II, and III are mandatory in the sixth through eighth grades, and the Advanced Latin and Greek classes are elected by students as a four year high school Classics Track in language. It is the mission of the Classics Department to generate enthusiasm for and promote the scholastic benefits of learning the languages and literature of the Ancient Romans and Greeks which have had such a profound impact upon English and Western culture. There are many reasons that elementary and intermediate Latin classes are mandatory for our junior high students: learning an inflected language provides the opportunity for increased skill in memorization and attention to detail; it approaches grammar from another perspective-one which usually helps cement the comprehension and correct usage of English grammar; it enriches their vocabulary and understanding of derivations; it gives additional exposure to Classical culture, ancient history, and influential literature which will serve them well in other classes, especially Humane Letters. Note: all Classics students take the annual National Latin Exam, and have the opportunity to participate in a number of other classical-focused National tests, contests and events.

<u>Senior Thesis:</u> The culminating project for Great Hearts students will be the senior thesis. At the beginning of senior year, the student selects a field of inquiry from the curriculum—literature, philosophy, math, science, the arts—and then selects a faculty member to act as his or her thesis advisor. The thesis is an exploration of one of the "Six Great Ideas" of humanity summarized as Truth, Beauty, Goodness, Justice, Liberty, and Equality. The first semester involves the selection of readings, directed study, note taking, and conversation with the advisor. The second semester involves the writing of the thesis in sections, with the advisor offering feedback and guidance at each successive stage. The thesis is not a research paper, and it does not attempt to prove a specific point. Rather, the senior is asked to logically develop and assertively present his or her own philosophy on a topic of personal interest derived from the chosen texts. The thesis culminates with the senior defending his or her final draft in front of a committee of three faculty members.

j) Describe plans to provide personal attention and guidance to all students.

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Great Hearts curriculum and methods of instruction are rigorous and meets the needs of all special needs students, including gifted students. Our mission is to provide an environment that allows every student to achieve academically. Accommodations and modifications are made to the curriculum to allow for full access and successful completion of the program.

#### k) If the proposed school will offer a gifted and talented program, describe it.

A gifted and talented program will not be offered at the school.

 Describe the extracurricular activities (e.g., athletics, clubs, and organizations), that will be offered.

#### Extracurricular Activities

<u>Athletics Program</u>: Competitive athletics are an essential to a Great Hearts academy. Each Great Hearts school offers, at a minimum, the following sports at the middle and high school level: tackle football, cross country, volleyball, basketball, soccer, track and field, baseball, and softball.

<u>Competitive Chess</u>: Students in grades 3-5 will participate in competitive chess. Students begin their study using "Chess for Children" before moving into more advanced chess strategy books. Students compete in all-school tournaments.

<u>Other Clubs</u>: Each Great Hearts academy is a vibrant comprehensive prep school, with extensive extracurricular offerings. Such typically include: Orchestra, Honors Choir, Philosophy Club, Chess Club, Hiking Club, Environmental Club, Speech and Debate, Fencing, Strategic Games Club, Latin Club, etc.

# m) Describe any plans to partner with other public or private agencies for the provision of student activities.

Great Hearts America—Texas has no plans to partner with any other public or private agencies for provision of student activities.

# n) Describe any strategies to be used that will enhance parental or community involvement in the educational opportunities of the students.

Great Hearts considers its parents to be partners, collaborators, and supporters. Parents are the best advocates for the needs of their children. Parents will be drawn to Great Hearts primarily for our new public school model, combining a core liberal arts curriculum with an academy ethos, a professionally diverse and uniquely qualified faculty, small class and school size, visible leadership and a strong encouragement and opportunity for family involvement.

The Great Hearts America -- Texas governing board will operate on the belief that parents play a critical role in ensuring their children's academic success. A policy analysis by Cato Institute reveals "that parental involvement in a child's education is a strong predictor of student achievement: typically, the more involved the parent, the better off the child."

Great Hearts will establish many ways to support parent involvement: Homework Policy and School-Parent compact ("Letter of Understanding") policies will be developed to promote parent involvement. Family nights and conferences will be designed as mechanisms to invite parents into the school. Newsletters, quarterly reports and the school report card will be used to frequently communicate with parents. Parents will have many opportunities to communicate with their son's or daughter's teachers, so that parents can develop an understanding of the school's expectations for forming habits of learning in a rigorous, liberal arts program. Also, parents will be encouraged to contact the teachers to share important information on how their child approaches the curriculum at home, and report if a student is experiencing difficulty. Throughout the year, parents will be involved in numerous conferences at which they will discuss their child's academic progress and develop plans to continue building the student's skills both at school and at home. Great Hearts students will invest a great deal in their education, and thus teachers and parents need to be unanimous in their support of them and to each another.

To involve parents further, the Great Hearts – Texas Board of Directors and school administration will create the Parent Organization to provide volunteer services such as the hot lunch program, facilitate communication, organize social activities such as back-to-school events and open houses, and raise funds to benefit the students and teachers of Great Hearts. All parents or guardians of students at Great Hearts will automatically be members. The Parent Organization will establish by-laws, elect leaders annually, and meet monthly during the school year. Based on Parent Organizations at other Great Hearts schools, we anticipate that the Great Hearts America—Texas, San Antonio Parent Organization will be very active in supporting the students and school.

Parents, teachers, and community members will be active members of the Parent Advisory Council, which takes a role in important decisions. Members of this council will meet regularly with the headmaster during the school year to discuss school life and make policy recommendations to the headmaster and board of directors. These parents also will reach out to all new parents, offering to mentor them and answer any questions they have about Great Hearts and its policies and procedures.

Great Hearts will send frequent newsletters to all parents that detail recent developments and the opportunities available to them to participate in the establishment and governance of the school.

Education Plan (p. 28) – Confirm your understanding that parents can be encouraged to attend the Parent-Student-Teacher Conference, but not required.

Great Hearts understands that parents can be encouraged to attend Parent-Student-Teacher Conferences, but not required.

APPROVED DURING CONTINGENCY PROCESS

Great Hearts America—Texas will participate in Great Hearts America's annual survey of parents' satisfaction and will solicit as many responses as possible from parents. The satisfaction survey asks parents how informed they feel about their children's performance and how to help them; whether or not they feel invited to participate in the school's activities and at what level; and how empowered they feel in addressing any issues and concerns they might have. The school's ultimate goal in assessing parental satisfaction will be 100% re-enrollment of its students. The Great Hearts America – Texas board will be given a detailed report of the results of this survey and will be empowered to act on those results.

Parents will be members of the governing board of Great Hearts America—Texas. They will be involved in policy-making, determining and implementing the school's mission, providing support to the school administrator, participating in the planning process and effective management of school resources, determining and monitoring the school's programs and services, enhancing the school's image, and assessing the school's and headmaster's performance.

 Describe plans for program evaluation and explain the ways in which results will be used to improve instructional programs for all students.

#### Ongoing Curriculum Development and Evaluation Process

The Great Hearts plan for implementing the TEKS includes building capacity for all teachers and provides adequate time for implementation, monitoring, and evaluation of the curriculum. Great Hearts' ongoing curriculum-development process will provide ample opportunities for reflection and revision so that the curriculum is updated, improved and aligned to the standards regularly. Each spring, a committee reviews Great Hearts curriculum; the committee includes representatives from Great Hearts lead office staff, headmasters and master teachers from across the Great Hearts network of schools. The review includes student achievement data; surveys of teachers, parents, and students; changes in state standards; changes in any other relevant requirements, such as the Great Books program.

p) Discuss whether or not the charter holder will seek annual state accountability ratings through traditional procedures or alternative education accountability (AEA) procedures for the proposed school. (See http://ritter.tea.state.tx.us/aea/.) If the evaluation plans include using AEA procedures, explain specifically how this school will qualify for at-risk designation and what makes this proposed school a distinct alternative from the traditional school in the independent school districts in the area.

Great Hearts America—Texas will be rated by the State of Texas traditional procedures. The organization is targeting a Texas Education Agency of "Recognized" or better in the first year of operation.

#### 6. Special Needs Students and Programs

# APPROVED DURING CONTINGENCY PROCESS

Other (p. 29) – If awarded a charter, applicant will seek accountability ratings through traditional procedures.

Great hearts will seek accountability ratings through traditional procedures.

Note that the SBOE's approval of an application should not be construed as a determination that the application complies with the various legal requirements concerning programs for special needs students.

Special Education Assurances and Development of Policies and Procedures

A statement of the sponsoring entity's willingness to comply with state and federal requirements if a charter is granted will suffice as the response to this section.

Great Hearts America will comply with state and federal requirements if a charter is granted and will file with the Texas Education Agency (TEA) a plan that provides assurances that it has in effect policies, procedures and programs consistent with State policies and procedures governing special education.

## Electronic Submission of Charter Policies and Procedures Assurances

Pursuant to the Individuals with Disabilities Education Improvement Act (IDEA 2004) Section 613(a)(1), each charter school must have on file with the Texas Education Agency (TEA) a plan that provides assurances that it has in effect policies, procedures and programs consistent with State policies and procedures governing special education. Region 18 Education Service Center (ESC) in coordination with other ESCs, provides leadership to the State in the electronic development of charter policies and procedures through the online Legal Framework for the Child-Centered Process Phase IV: "Charting the Course" <u>http://framework.esc18.net/</u>.

Technical Assistance; For questions concerning or information about the electronic submission of charter policies and procedures, please contact your regional ESC special education contact at <u>http://www.tea.state.tx.us/special.ed/escinfo/contact.html</u>.

#### 7. Geographic Boundary

a. List the school districts from which the proposed charter school will accept students. If the charter school will accept students from only a portion of a school district or districts, state exactly what the boundary will be. Do not list the charter schools located within the designated geographic boundary, but note that, as explained in "c" that follows, the sponsoring entity must send copies of the Statement of Impact form and Application Coversheet, accompanied by a letter to all superintendents of school districts and charter schools within the designated geographic boundary.

The list of list of districts and charters from which Great Hearts America—Texas will accept students is provided below. Great Hearts Texas will not have a transfer policy. See **Attachment C** for copies of the Statement of Impact form and Application Coversheet, accompanied by a letter that was sent to all superintendents of school districts and charter schools within the transfer boundary.

San Antonio ISD	Harlandale ISD	George Gervin Acad
North East ISD	Radiance Academy	School of Excellence In Ed
Southwest ISD	Shekinah Radiance Acad	Kipp San Antonio
Northside ISD	Southwest Preparatory	City Center Health Careers
South San Antonio ISD	San Antonio Technology	Academy of Careers/ Tech
Alamo Heights ISD	Henry Ford Academy	Harmony Science Acad
Judson ISD	Por Vida Academy	George I Sanchez Charter
Lackland ISD	Lighthouse Charter	East Central ISD
Edgewood ISD	Positive Solutions	San Antonio Can High School
Southside ISD	New Frontiers	H.Carter King
Somerset ISD	Randolph Field	John H Wood Jr
Ft Sam Houston ISD	School For Ing & Crtvty	Brooks Academy of Sci /Eng

If the proposed charter school will have a "transfer policy" in accordance with 19 TAC, §100.1207(e) (i.e., it will admit students who reside outside of the geographic boundary just described), once all eligible applicants who reside within the geographic boundary have submitted a timely application and have been enrolled, **list the school districts** from which the proposed charter school will accept transfer students. Do not list the charter schools located within the "transfer boundary," but note that, as explained in "c" that follows, the sponsoring entity must send copies of the Statement of Impact form and Application Coversheet, accompanied by a letter to all superintendents of school districts and charter schools within the transfer boundary.

b. The sponsoring entity must send copies of the Statement of Impact form and Application Coversheet, accompanied by a letter from the sponsoring entity, to all superintendents of school districts and charter schools within the proposed school's designated geographic boundary and transfer boundary, if applicable. (The Statement of Impact form and a sample cover letter are included in Appendix I of this RFA.) The purpose of sending the Statement of Impact form is to document any adverse impact on a district or charter school. The documents must be sent to districts and charter schools in time to include signed certified return receipt card copies as part of the application submitted to TEA. The proposed charter school is not responsible for ensuring that superintendents return the Statement of Impact forms to TEA. If a superintendent receiving the documents requests a complete copy of the application, the sponsoring entity must provide the document, including all attachments, to the superintendent.

Submit, as Attachment C, the certified mail receipt cards showing the dates that Statement of Impact form and accompanying documents were received and signed for by the staff of the districts and the open-enrollment charter schools within the proposed school's designated geographic boundary and transfer boundary, if applicable. In the absence of signed certified mail return receipt cards, the certified mail receipt showing each addressee, fees paid, and the date mailed will be accepted. Attachment C contains the certified mail receipts showing each addressee, fees paid, and the date mailed.

#### 8. Admissions and Enrollment Policies

a) Specify the period (both the beginning and ending dates) during which applications for admission will be accepted. TEC, §12.117, requires that a charter school establish a reasonable application deadline for the submission of applications for admission. The application period should not be "yearround" or extend for most of the year.

All applicants will be admitted to the Great Hearts America—Texas academy to the extent that capacity exists. Each year, school administration will announce an open enrollment period for the following year, from November 1 to March 31, and advertise it to the larger local community.

b) Describe the procedures to be followed in conducting a lottery when a grade or class is oversubscribed. Under federal law, a charter school must admit students through a random selection process if the number of applications for a grade or class exceeds the number of available spaces. If the number of applications does not exceed the number of available spaces, a lottery is not required.

If, during any open enrollment period, there are more completed applications than there are available openings for a particular grade, a public, random lottery will be held to determine the order for offering admission. All applications received during the open enrollment period are given equal weight in the lottery process. Results of the lottery are sent to applicants within two weeks following the lottery

Applicants <u>will not</u> be denied admission based on limited proficiency in English as a second language or on any special education disability.

c) If the charter school will exempt from the lottery returning students, the siblings of returning students, and/or the children of the school's founders and staff (so long as the total number of students allowed constitutes only a small percentage of the total enrollment) as permitted by the federal non-regulatory guidance on the charter school program, state the categories of applicants that will be exempted. Note that students who attended a private school before it became a public charter school are not to be considered "returning students" and may not be given priority in admission to the charter school. Also note that the federal guidance allows only the siblings of currently enrolled students and children of the founders and staff as long as it comprises only a small percentage of the enrollment.

Returning students, siblings of current students and children of Great Hearts America – Texas founders and staff are granted preferential enrollment. c) Specify the approximate date on which a lottery will be conducted if required.

The lottery will be conducted on or around April 10<sup>th</sup>.

 e) State whether a waiting list will be developed for the applicants who were not admitted through the lottery. If a waiting list will be used, describe the process.

The lottery will order students randomly for each grade level. After all spots are filled, if more applications remain than there are open spots, the remaining applications will be waitlisted in the order generated randomly.

 d) If the school will accept applications that are submitted outside of the designated application period, describe how the school will treat such applications.

After the application deadline, pupils for any remaining slots or from a waiting list will be accepted in chronological order and added to any existing waitlist.

e) Provide the non-discrimination statement that will be included in the proposed school's admissions policy. TEC, §12.111(a)(6) requires that a charter school's admissions policy include a statement that the school will not discriminate in admissions based on gender, national origin, ethnicity, religion, disability, academic ability, athletic ability or artistic ability or the district the child would otherwise attend.

Great Hearts America will not discriminate in admissions based on gender, national origin, ethnicity, religion, disability, academic ability, athletic ability or artistic ability or the district the child would otherwise attend.

f) If the proposed school will specialize in performing arts, discuss whether applicants will be required to demonstrate artistic ability for admission to the school. TEC, §12.111(a)(6) permits a charter school specializing in performing arts to have an admissions policy that requires a student to demonstrate artistic ability. In addition, TEC, §12.1171 permits a charter school specializing in one or more performing arts to require an applicant to audition for admission to the school. 19 TAC, §100.1207 has the administrative rules clarifying the statutory changes that allow a school specializing in performing arts to hold auditions.

The proposed academy will not specialize in performing arts.

g) State whether the school will exclude from admission students with documented histories of any of the types of misconduct listed in TEC, §12.111(6). TEC, §12.111(a)(6) authorizes a charter school to exclude a student who has a documented history of a criminal offense, a juvenile court adjudication, or discipline problems under TEC Subchapter A, Chapter 37. Note that TEC, §12.131 requires that the governing body of an open-enrollment charter school adopt a code of conduct for its district or for each campus.

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Great Hearts America will adopt a code of conduct for each campus as required by TEC, §12.131 requires upon notification of approval. Students with documented histories of any of the types of misconduct listed in TEC, §12.111(6). TEC, §12.111 will be excluded from admission.

h) Describe the manner in which the proposed school will admit students under TEC, §25.001. Include the information that an applicant must provide in order to establish eligibility for admission. Note that applicants may not be required to provide transcripts or other academic records until after they are offered admission and are enrolling.

Except in cases of misconduct described in (g) above, admission at Great Hearts America—Texas is lottery based and is dependent on the submittal of an application with grade level and contact information. There are no other requirements.

 Describe the manner in which the proposed school will enroll students under TEC, §25.002 and 19 TAC, §129.1. Include the information that an enrolling student must provide beyond what is required by TEC, §25.002. Note that a student may not be precluded from enrolling due to the charter school's failure to receive information required by TEC, §25.00.

<u>Upon enrollment</u>, Great Hearts America—Texas families will be required to provide the name of the sending institution for grades 1-11. Additionally, Great Hearts America—Texas will ask parents to provide unofficial copies of student data. Great Hearts will contact the sending institution to secure student data. No student will be precluded from enrolling should the send institution fail to provide the requested student information.

## 9. Governance

In this application and during the application period, the eligible entity making application is called the "sponsoring entity." Once a charter is granted, the sponsoring entity from that point forward is called a "charter holder." TEC, §12.120 states, "A person may not serve as a member of the governing body of a charter holder, as a member of the governing body of an open-enrollment charter school, or as an officer or employee of an open-enrollment charter school if the person has been convicted of a felony or a misdemeanor involving moral turpitude...."

Charter schools must check the criminal history (through the Texas Department of Public Safety) of each person who intends to serve as an employee in any capacity, a member of the governing body of the charter holder, a member of the governing body of the charter school, and any person who files, in writing, an intention to serve as a volunteer. See 19 TAC, §100.1151. Please note that the Application Coversheet on page 23 requires the CEO of the sponsoring entity and the application preparer to certify that no members of the governing body of the sponsoring entity or of the proposed charter school nor any officers or employees of the proposed school have been convicted of a misdemeanor involving moral turpitude or of any felony. A history of bankruptcy of a member of the governing body of the sponsoring entity or the proposed charter school or of an officer of the proposed school may be relevant to the SBOE's evaluation of the application.

The Biographical Affidavit Form that must be completed by each member of the governing body of the sponsoring entity or the proposed school and each identified officer of the proposed school contains questions regarding bankruptcy history.

#### Governing Body of the Sponsoring Entity

The governing body of a charter holder has the primary responsibility for implementing the public school program authorized by the open-enrollment charter and ensuring the performance of the students enrolled in its charter schools in accordance with the Texas Education Code. See 19 TAC, §100.1101. Members of the governing body of a charter holder will be required to undergo training as provided in 19 TAC, §100.1102. Records of an open-enrollment charter school and records of a charter holder that relate to an open-enrollment charter school are government records for all purposes under state law. See TEC, §12.1052.

a) List the members of the governing body of the sponsoring entity. Submit, as part of Attachment D, a notarized biographical affidavit for each member of the governing body of the sponsoring entity. A sample of the biographical affidavit form is included in Appendix II. The actual form that must be completed is an online form that is located at http://www.tea.state.tx.us/index.aspx?id=3475. Biographical affidavits must be notarized within 90 days of the due date of the application.

The members of the governing body of the sponsoring entity are listed below:

1. Peter Bezanson, President

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- 2. Dan Scoggin, Vice President
- 3. Ward Huseth, Secretary/Treasurer

Attachment D contains a notarized biographical affidavit for each member of the governing body of the sponsoring entity.

b) If the sponsoring entity is an out-of-state organization, state whether or not a majority of the members of the governing body of the sponsoring entity reside within 50 miles of the proposed charter school's designated geographic boundary (as described in response to item "a" in Section 7 Geographic Boundary). Note that if a majority of the members do not reside within 50 miles of the proposed school's designated geographic boundary, the SBOE's approval of the charter will be contingent upon the sponsoring entity's establishing a secondary governing body (a governing body of the charter school) that is made up entirely of members who reside within 50 miles of the proposed school's designated geographic boundary. Also note that even if a secondary governing body is established as required, Texas law requires the governing body of the sponsoring entity to meet in a location accessible to the

public when deliberating charter related matters. See Tex. Att'y Gen. Op. No. JC-0487 (2002); Tex. Att'y Gen. Op. No. JC-0053 (1999) at pp. 5-6. The applicant should consult its own legal counsel about these requirements.

Great Hearts America—Texas will be an in-state organization. Currently, there are three board members and they do not reside within 50 miles of the proposed school's designated geographic boundary. Additional governing board members will be elected who reside within 50 miles of the proposed school's designated geographic boundary. <u>Great Hearts America—Texas will seat a majority of the board members who within 50 miles of the proposed school's designated geographic boundary</u>. The Great Hearts America governing body will meet in a location accessible to the public when deliberating charter related matters.

c) Submit, as Attachment E, the 501(c)(3) determination letter from the Internal Revenue Service (IRS) or a statement that this is not necessary because the sponsoring entity is an institution of higher education or a governmental entity. A potential applicant without a determination letter may have difficulty obtaining one in time for the application due date. The IRS controls this process, and it is often lengthy.

Attachment E contains the 501(c)(3) determination letter from the Internal Revenue Service (IRS). The original 501(c)(3) determination letter was filed under the name Sister Creek Center for the Liberal Arts. A Restated Certificate of Formation with New Amendments for Sister Creek Center for the Liberal Arts, a non profit coprporation, was filed on February 17, 2012. See Attachement F for the amendments to the entity name, address and purpose of the non profit coproration and the amended by laws are found in Attachment G.

d) Submit, as Attachment F, the original Articles of Incorporation filed with the Texas Secretary of State, or the state of incorporation, any Restated Articles of Incorporation, and any Articles of Amendment. If the sponsoring entity has amended its original Articles of Incorporation and does not submit both the original Articles of Incorporation and all of the documents reflecting the amendments, this will result in this item being considered incomplete and the removal of the application from the process. If incorporated after January 1, 2006, substitute with Certificate of Formation and Certificate of Filing. If the sponsoring entity does not submit both the Certificate of Formation and Certificate of Filing, this will result in this item being considered incomplete and the removal of the application from the process. Comparable documents must be submitted if the sponsoring entity is a nonprofit corporation incorporated in another state. If the sponsoring entity is an institution of higher education or a governmental entity, the entity should submit a statement that this requirement is inapplicable.

Attachment F contains the original Articles of Incorporation filed with the Texas Secretary of State, or the state of incorporation, any Restated Articles of Incorporation, and any Articles of Amendment. A Restated Certificate of Formation with New Amendments for Sister Creek Center for the Liberal Arts, a non profit coproration, was filed on February 17, 2012. The entity name, address and purpose of the non profit coproration have been amended to the following:

- 1. Texas Non Profit Entity Name: Great Hearts America—Texas
- <u>Registered Office of the Coorporation Address</u>: Great Hearts—Texas, 350 N. St. Paul Street, Suite 2900, Dallas Texas, 75201-4234
- 3. <u>Purpose</u>: A tax emempt organization severing grade K-12 public education. The character of affairs of this organization follow:
  - a) To operate public charter schools; To develop each student's academic potential, personal character and leadership qualities through academically rigorous and content-rich educational program grounded in the classical tradition; and
  - b) To strive to give every student the education he or she deserves and needs.
- 4. By Laws: Amended by laws are found in Attachment G.
- e) Submit, as Attachment G, a complete copy (originals and any amendments) of the bylaws of the sponsoring entity. If the sponsoring entity is an institution of higher education or a governmental entity, the entity should submit a statement that this requirement is inapplicable.

Attachment G contains a complete copy (originals and any amendments) of the bylaws.

f) State the approximate date on which the sponsoring entity was incorporated or established.

The entity name, address, by laws and purpose of the non profit corporation have been amended Great Hearts America—Texas.

A Restated Certificate of Formation with New Amendments for Sister Creek Center for the Liberal Arts established in 2002, a non profit corpporation, was filed on February 17, 2012 on behalf of Great Hearts America—Texas. No assets transferred in the reformation process.

g) Describe the purpose for which the sponsoring entity was established.

The sponsoring entity was established to provide public education for grades K-12.

h) Describe the activities in which the sponsoring entity has been engaged in the past and in which it is currently engaged. Agency staff will review the franchise tax status on the website of the State of Texas Comptroller's Office. See <u>http://www.window.state.tx.us/taxinfo/franchise/</u>. A Restated Certificate of Formation with New Amendments for Sister Creek Center for the Liberal Arts established in 2002, a non profit corpporation, was filed on February 17, 2012 on behalf of Great Hearts America—Texas. Sister Creek Center for the Liberal Arts was established for the purpose of serving public education.

Great Hearts America—Texas is a tax emempt organization severing grade K-12 public education. The character of affairs of this organization follow:

- a) To operate public charter schools; To develop each student's academic potential, personal character and leadership qualities through academically rigorous and content-rich educational program grounded in the classical tradition; and
- b) To strive to give every student the education he or she deserves and needs.
- i) Disclose whether the sponsoring entity has operated a private daycare, private school, public daycare, or public school.

Great Hearts America—Texas has not previously operated any schools. Great Hearts Academies in Arizona currently operates twelve schools in metropolitan Phoenix.

j) Disclose whether the sponsoring entity is a religious or faith-based organization or engages in any activities with a religious purpose.

Great Hearts is a non-sectarian organization, and does not engage in any activities with a religious purpose.

k) Discuss any litigation in which the sponsoring entity has been involved.

There is no known litigation.

 Disclose whether the sponsoring entity has been sanctioned by any state regulatory agency.

There are no known state sanctions.

 m) Describe the initial incorporators of the sponsoring entity, including their names and professional backgrounds.

**Dan Scoggin, Ph.D.**, is the founding chief executive officer of Great Hearts Academies in Arizona, a network of excelling charter schools dedicated to serving the families of metropolitan Phoenix with a classical, prep school education that is public and tuition-free. In 2004, Dr. Scoggin authored the Great Hearts business plan and secured its initial grant funding from local and national donors. He has since overseen the network's growth from 300 students at one school to 5,000 students at

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12 academies across the Valley, with new academies to serve the Maryvale and North Phoenix communities planned for 2012-13. Dr. Scoggin attended Santa Clara University in California as an English literature major and spent his junior year abroad at the University of Durham in England. While completing his Ph.D. in English literature at the Claremont Graduate University, he taught at Harvey Mudd College, The Phoenix Institute at the University of Notre Dame, Mesa Community College, and coached basketball at Pomona College. He is a 2008-2009 Piper Fellow and recently attended the Executive Education Program at Stanford University.

**Peter Bezanson, Ph.D.**, the Great Hearts Academies chief academic officer, has worked in the Great Hearts family since 2001, beginning as a teacher of philosophy and mathematics at Tempe Preparatory Academy. He is the primary academic leader for Great Hearts, reporting directly to the CEO. He is responsible for maintaining the core liberal arts values of the network and the constant improvement of the curriculum and instructional practices. With the CEO, he recruits, develops, trains and mentors Academy headmasters. He co-authored the Great Hearts Academies business plan, as well as the strategic business plan and data analysis plan for the Arizona Charter Schools Association. Dr. Bezanson received his B.A. in mathematics and philosophy from St. John's College and his M.A. and Ph.D. in philosophy from the University of Iowa. Dr. Bezanson is also the Vice President of the Arizona State Board for Charter Schools, the main charter authorizer in Arizona.

Ward Huseth, Great Hearts Academies Chief Financial Officer, began working for Great Hearts Academies in January 2012. Prior to his coming to Great Hearts, from 2009 to 2011, he was the Chief Financial Officer for the industry leading Charter School Growth Fund. Before that, he was a VP and divisional CFO for Knowledge Learning Corporation from 2004 to 2008. Mr. Huseth obtained a CPA license in 1999 (inactive) and graduated with a degree in Business Administration from the University of Wisconsin Whitewater.

n) Discuss any plans for further recruitment of organizers of the proposed school.

Great Hearts America—Texas will recruit San Antonio community members to this board, bringing expertise in areas of school law, community relations, business, and education.

 o) Describe the methods to be used to inform charter school parents, students, and employees about procedures for receiving and responding to complaints. Note that under 19 TAC, §100.1033(c)(6)(C), the governing body of a charter holder shall not delegate final authority to hear or decide employee grievances, citizen complaints, or parental concerns.

Procedures for receiving and responding to complaints from charter school parents, students, and employees are listed in the school and employee handbooks. Procedural safeguards are established pursuant to Texas law. Great Hearts America—Texas will not delegate its authority to hear or decide employee grievances, citizen complaints, or parental concerns.

- p) Describe the following elements of the governance structure of the governing body of the sponsoring entity. Although some of the information requested below might be addressed by the sponsoring entity's Articles of Incorporation, bylaws, or other documents, please provide the information requested below:
  - 1) the officer positions designated;

The officers of the Corporation shall be a President, a Vice President, and a Secretary/Treasurer and such other officers, including Assistant Secretary, as from time to time, may be determined by the Board. The election of any officer of the Corporation shall not of itself create contract rights in the office.

The President shall recommend to the Board for its approval such additional corporate officers as may be necessary to the business of the Corporation, who shall perform such duties and responsibilities as may be prescribed by the President.

2) the manner in which officers are selected and removed from office;

The officers shall be elected by the Board at the annual meeting of the Board of Directors, and each office shall serve for a one (1) year term and until his or her successor is elected. Any officer may be elected to succeed him or herself.

Any officer elected by the Board may be removed, with or without cause, at any time by the affirmative vote of two-thirds (2/3) of the voting Directors then in office. The officer in question shall not vote on the question of removal, but may be present at the meeting and may be counted in determining the presence of a quorum. Such removal shall not prejudice the contract rights, if any, of the person so removed.

 the manner in which members of the governing body are selected and removed from office;

All Directors must be annually appointed or reappointed by the Member, according to the regulations outlined in Section 2 above. Directors may be removed by the Member according to Section 4 below.

Any of the Directors may be removed with or without cause, by decision of the Member. A Director who is removed in accordance with this section shall also be deprived of status as an officer of the Corporation. Any Director who is absent from more than three (3) consecutive meetings of a Board meeting in any fiscal year may be removed automatically, unless the Member acts affirmatively to retain the Director. A Director may resign at any time by written notification to the Corporation at its principal office, or to the Corporation's statutory agent, with a copy to the Member. Unless otherwise specified in the notice, said notice shall be effective upon receipt thereof by the Corporation.

the manner in which vacancies on the governing body are filled;

The Member shall appoint such additional Directors or replacement Directors as it deems necessary. A person appointed as a Board member to fill an unexpired term on the Board of less than one (1) year shall hold office until the next annual meeting of the Board or until his or her successor is appointed.

#### 5) the term for which members of the governing body serve; and

There shall be not less than three (3) or more than seven (7) Directors. The number of Directors may be increased or decreased in accordance with Section 3 of this Article, but in no case shall the number of Directors be less than three (3). Each Director shall serve for a one (1) year term and until his or her successor is appointed. A Director whose term has expired may be appointed to succeed him or herself.

#### 6) whether the terms are to be staggered.

The terms are not staggered.

#### **Other Governance**

If at some point, the charter holder plans to enter into an agreement with a management company, the contract for services must be approved by the commissioner of education at least 30 calendar days prior to any performance or payments under the contract. See 19 TAC, §100.1155.

Describe the extent to which any private entity, including any management company, other nonprofit group, other governmental agency and/or any other educational organization will be involved in the operation of the charter school. Identify any members of the governing board or officers of the charter school who are affiliated with all such entities.

There are no known conflicts.

Governing Body of the Charter School (if different from the governing body of the sponsoring entity) Some charter holders choose to delegate some powers or duties of the governing body of the charter holder to a governing body of the charter school. Non-delegable duties are listed in 19 TAC, §100.1033(c)(6)(C). Members of the governing body of a charter school will be required to undergo training as defined by 19 TAC, §100.1102.

q) If a governing body of the charter school exists, list the members.

The Governing Body of the Charter School is not different from the governing body of the sponsoring entity.

r) Submit, as part of Attachment D, a notarized biographical affidavit for each member of the governing body of the charter school. A sample of the biographical affidavit form is included in Appendix II. The actual form that must be completed is an online form that is located at http://www.tea.state.tx.us/index.aspx?id=3475. Biographical affidavits must be notarized within 90 days of the due date of this application.

- s) Describe the following elements of the governance structure of the governing body of the charter school:
  - 1) The officer positions designated:
  - 2) the manner in which officers are selected and removed from office;
  - the manner in which members of the governing body are selected and removed from office;
  - 4) the manner in which vacancies on the governing body are filled;
  - 5) the term for which members of the governing body serve; and
  - 6) whether the terms are to be staggered.

The Governing Body of the Charter School is not different from the governing body of the sponsoring entity.

# 10. Human Resources Information

#### a) Attachment H - Organizational chart

The Great Hearts America—Texas Organizational Chart is found in Attachment H.

 b) Describe how the charter holder board will maintain responsibility for and oversight of:

Great Hearts America—Texas is focused on delivering high quality outcomes for all students, teachers and families. The school-based administrators will be held accountable to headmaster, the headmaster to the Board of Directors, and the Board to Texas Education Agency, for the indicators on the next page:

Indicator	Responsibilities	Evaluation
Student and school performanc e;	<u>Headmaster</u> : Will provide charter school instructional performance reports to the Board of Directors for review. Sufficient progress must be noted each year for the Board of Directors to find a favorable review.	Instructional management; school organization and AEIS and
	Assistant Headmaster, Head of Lower School and Dean of Students: Will provide the Headmaster with reports of the effectiveness of instructional practices. These indicators shall include STARR results and testing on the formative campus-based tests and norm reference tests. Sufficient progress must be noted each year for continued employment.	campus performance objectives, and student performance
	Director of Operations: N/A	

Indicator	Responsibilities	Evaluation
Manageme nt and administrati ve practices;	<ul> <li><u>Headmaster</u>: Student, parent and teacher satisfaction surveys will be conducted annually. Survey results will be reported to the Board of Directors. Elements to be included in surveys are satisfaction with academy program, school operations, facility management, instructional practices, reporting progress, discipline, communication, and safety. Responses will be considered during annual review.</li> <li><u>Assistant Headmaster, Head of Lower School and Dean of Students</u>: Student, parent and teacher satisfaction surveys will be conducted annually. Survey results will be reported to the Headmaster. Elements to be included in surveys are satisfaction with academy program, school operations, facility management, instructional practices, reporting progress, discipline, communication, and safety. Responses will be considered during annual review.</li> </ul>	Management of administrative fiscal and facilities; personnel management; school or organization morale
	Director of Operations: Elements of the survey will include school operations, facility management and safety. Responses will be considered during the annual review.	
Student attendance and accounting reporting requiremen ts;	<u>Headmaster</u> : Will review and certify attendance data and report results bi-annually to the Board of Directors regarding accuracy. Inaccurate reports submitted to TEA will be considered during the annual evaluation. <u>Director of Operations</u> : Will prepare and submit attendance data and report results bi-annually to the Headmaster regarding accuracy. Inaccurate reports submitted to TEA will be considered during the annual evaluation.	Management of Administrative and fiscal responsibilities
	Assistant Headmaster, Head of Lower School and Dean of Students: Will review attendance data submitted by the attendance staff regarding accuracy. Inaccurate reports submitted to TEA will be considered during the annual evaluation.	
Complianc e with generally accepted accounting principles and generally	Headmaster: Will verify that all financial documents are in accordance with GASB 34 and the defined state accountability system for charter schools. Accountability will be evidenced by the financial reports provided to the Board of Directors and the Headmaster and reflected in the Director of Operations annual review. The AEIS rating regarding financial reporting will also be considered each year as a	Management of administrative and fiscal responsibilities

Indicator	Responsibilities	Evaluation
accepted standards of fiscal nanageme ot;	dependent factor on continued employment. <u>Director of Operations</u> : Will utilize, maintain, and prepare financial documents that are in accordance with GASB 34 and the defined state accountability system for charter schools. His/her signature on documents submitted to the board and to the state will signify accuracy and ethical reporting of information. Accountability will be evidenced by the financial reports provided to the Board of Directors and the Headmaster and reflected in the Director of Operations annual review. The AEIS rating regarding financial reporting will also be considered each year as a dependent factor on continued employment. <u>Assistant Headmaster, Head of Lower School and</u> <u>Dean of Students</u> : Will provide the campus staff a structure for purchasing supplies and materials through purchase order requests. His/Her signature will be required on all PO's to ensure adequate tracking of fund requests. Submission of weekly time sheets for campus staff will be required for continued employment. The administrators listed will present all POs to the Director of Operations for approval.	
Complianc e with special education and bilingual education/ English as a second language (BE/ESL) program requiremen ts;	<ul> <li>Headmaster: <ul> <li>a) Provide policies and procedures to the Board of Directors for approval.</li> <li>b) Budget for and hire certified staff to provide services.</li> <li>c) Budget for professional development for all teachers.</li> </ul> </li> <li>Assistant Headmaster, Head of Lower School and Dean of Students: <ul> <li>a) Establish the participants of the ARD and/or LPAC committees.</li> <li>b) Provide for professional development activities for all teachers.</li> </ul> </li> <li>b) Provide for professional development activities for all teachers.</li> <li>c) Implement service for identified special education and ESL students.</li> <li>d) Participate in program evaluations.</li> <li>e) Evaluate special education and ESL instructional staff.</li> <li>f) Review STARR, norm reference tests, state tests for ESL, SDAA, and LDAA to determine efficiency and effectiveness of program implementation.</li> </ul>	Instructional management of school

Indicator	Responsibilities	Evaluation
	<ul> <li><u>Director of Operations</u>: <ul> <li>a) Meet designated spending thresholds for designated funds for direct services for students.</li> <li>b) Code revenues and expenditures with appropriate program intent codes.</li> <li>c) Report revenues and expenditures accurately to PETMS.</li> <li>d) Retain documentation for external auditor.</li> </ul> </li> </ul>	
Financial accounting requiremen ts, including grant reporting requiremen ts;	<ul> <li>A Retain documentation for external additor.</li> <li><u>Headmaster</u>: Will ensure that Director of Operation's report(s) include all necessary information, meet state and federal guidelines and are submitted within acceptable timelines.</li> <li><u>Assistant Headmaster, Head of Lower School and Dean of Students</u>: Code purchase orders requesting funds to appropriate funding codes.</li> <li><u>Director of Operations</u>: Will provide a calendar to the Headmaster that includes all grant expenditures requirements to be reported to the Board of Directors. The Director of Operations will also be held accountable for the results of the external audit. Exceptions noted by external auditor will be reported to the Board of Directors and the Headmaster and will be considered during the annual review.</li> </ul>	Management of administrative and fiscal responsibilities
Reporting requirements, including those through the Public Education Information Management System (PEIMS);	Headmaster: Will be held accountable for all required charter school reports including certifying the PEIMS data for the charter school after each submission and submitting final reports to the Board of Directors. Failure to respond in a timely fashion will be addressed during the evaluation process conducted annually by the Board of Directors. <u>Assistant Headmaster, Head of Lower School and Dean of Students</u> : Will be held accountable to the Headmaster for all required campus level reports. Failure to respond in a timely fashion will be addressed during the evaluation process conducted by the Headmaster. <u>Director of Operations</u> : All charter school reports including PEIMS submission will be the responsibility of the Director of Operations. The Director of Operations will submit board-approved budgets to the PEIMS coordinator for the Fall submission and actual for the Spring submission. Fatal and warnings will be corrected to ensure accuracy in reporting. The	Management of administrative and fiscal responsibilities

Indicator	Responsibilities	Evaluation
	Headmaster will review the reports generated by Edit+ after each submission for timeliness and accuracy. The information will be considered during the annual review for the charter school after each submission and submitting Edit+ reports to the Headmaster. Failure to respond in a timely fashion will be addressed during the evaluation process conducted annually by the Headmaster.	
Reporting annual school and student performanc e to students, parents, and the public;	Headmaster: Will be responsible for providing AEIS information to the Board of Directors to disseminate information. Assistant Headmaster, Head of Lower School and Dean of Students: After the AEIS is approved for dissemination by the Board of Directors, the school will provide a copy of the school's report card to every parent with 30-days of board approval. Director of Operations: N/A	AEIS and campus performance objectives; school or community relations
Distributing to parents information related to the qualificatio ns of each teacher of the program, including any profession al or educational degree held by each teacher, a statement of any certification under Subchapter B, Chapter 21, held by each teacher, and any	Headmaster: Will ensure accurate annual reports regarding professional staff qualifications and notifications according to TEC are distributed in a timely manner. <u>Assistant Headmaster, Head of Lower School and</u> <u>Dean of Students</u> : Will be responsible for disseminating accurate information regarding qualifications of each professional employee to parents annually within the first six weeks of school. The report to the parents will include the name of the professional and a list of educational degrees, certification, and qualifications. If an employee is found to be inappropriately certified or uncertified as defined by TEC and is assigned to a classroom for more than 30 consecutive days, written notification will be delivered to each parent or guardian of each student enrolled in that classroom. <u>Director of Operations</u> : N/A	Personnel management

Indicator	Responsibilities	Evaluation
relevant experience of each teacher.		

TEC, §12.120 states, "A person may not serve as a member of the governing body of a charter holder, as a member of the governing body of an open-enrollment charter school, or as an officer or employee of an open-enrollment charter school if the person has been convicted of a felony or a misdemeanor involving moral turpitude..."

An employee of an open-enrollment charter school who qualifies for membership in the Teacher Retirement System of Texas shall be covered under the system to the same extent a qualified employee of a school district is covered. For each employee of the school covered under the system, the school is responsible for making any contribution that otherwise would be the legal responsibility of a school district. See TEC, §12.1057.

TEC, §12.1059 states, "A person may not be employed by or serve as a teacher, librarian, educational aide, administrator, or counselor for an open-enrollment charter school unless the person has been approved by the agency following a review of the person's national criminal history record information as provided by Section 22.0832."

Charter schools must check the criminal history (through the Texas Department of Public Safety) of each person who intends to serve as an employee in any capacity, a member of the governing body of the charter holder, a member of the governing body of the charter holder, a member of the governing body of the charter school, and any person who files, in writing, an intention to serve as a volunteer. See 19 TAC, §100.1151.

#### **School Officers**

"School officer" is defined in TEC, §12.1012, as a principal, director, other chief operating officer, assistant principal, assistant director, or a person charged with managing the finances of an open-enrollment charter school. Some charter holders choose to delegate some powers or duties of the governing body of the charter holder to various school officers. Non-delegable duties are listed in 19 TAC, §100.1033(c)(6)(C). Charter school officers will be required to undergo training as provided in 19 TAC, §§100.1103-100.1105.

a) Submit, as part of Attachment D, a notarized biographical affidavit for each school officer. A sample of the biographical affidavit form is included in Appendix II. The actual form that must be completed is an online form that is located at http://www.tea.state.tx.us/index.aspx?id=3475. Biographical affidavits must be notarized within 90 days of the due date of this application.

Attachment D contains a statement about the notarized biographical affidavit for each Great Hearts America—Texas administrative officer.

b) Submit as Attachment I, a Supplemental Human Resources Information Form for each officer position. Note that some duties cannot be delegated by the governing body of the charter holder to a school officer. Non-delegable duties are listed in 19 TAC, §100.1033(c)(6)(C).

Attachment I contains a Supplemental Human Resources Information Form for each officer position.

A sample of the Supplemental Human Resources Information Form is included in Appendix III. The actual form that must be completed is an online form that is located at http://www.tea.state.tx.us/index.aspx?id=3475. A Supplemental Human Resources Information Form must be completed for the CEO/superintendent, financial officer, principal, assistant principal, director, assistant director, and any other administrative position that the proposed charter anticipates filling.

General salary information for specific school districts and for the state as a whole may be found at http://ritter.tea.state.tx.us/adhocrpt/Standard\_Reports.html, under the section entitled Staff Reports. Specific salary information may be purchased from the Texas Association of School Boards at https://www.tasb.org/apps/tasbstore/storeCategory.cfm?cat=3.

Note that charter schools may not compensate an individual in excess of the fair market value of the services rendered. The fair market value of the services rendered is based on the individual's education, experience, prior salary history, job duties actually performed, and what a typical person with similar skills, experience, and job duties would earn. See 19 TAC, §100.1022(c)(2)(B)(i).

 c) Describe professional development opportunities that will be offered to school officers.

Professional development opportunities will be offered to all school officers according to state statute and identified local needs. At a minimum, all school officers will comply with the training required in 19 TAG §§100.1103-100.1105 for their respective positions.

Professional development curriculum will be provided by a TEA Certified Trainer. Additionally, the charter school will take advantage of all training that is offered by the Charter School Resource Center, the Region 20 Education Service Center, and other opportunities that will advance knowledge and skills in the identified areas.

The Headmaster and/or other designated school officers will obtain American Red Cross training and certification for first aid, cardiopulmonary resuscitation (CPR), and automated external defibrillation (AED).

d) Explain the method(s) and timelines that will be used to evaluate school officers; designate the responsible party for the evaluations.

All administrative personnel will be evaluated in accordance with provisions of Chapter 150, Subchapter BB, Texas Education Code, §21.354 and §39.054. These

domains will be organized into an evaluation system. All administrative staff will meet with their supervisors at the beginning of the year to set performance objectives for each established domain, and will meet twice during the year to assess progress in meeting those objectives.

The domains and descriptors used to evaluate each administrator in a school district will include the following:

Instructional management of Texas academic excellence indicators, and campus performance objectives: The academy administrator promotes improvement of instruction through activities such as the following: monitoring student achievement and attendance; diagnosing student needs; helping teachers design learning experiences for students; encouraging the development and piloting of innovative instructional programs; and facilitating the planning.

<u>School or organization morale</u>: The academy administrator fosters a positive school or organization morale through activities such as the following: assessing and planning improvement of the school, school district, or community environment; reinforcing excellence; promoting a positive, caring climate of learning; and using effective communication skills.

<u>School or organization improvement</u>: The academy administrator promotes leadership in efforts to improve the school or organization through activities such as the following: collaborating in the development and articulation of a common vision of improvement; encouraging appropriate risk-taking; and ensuring continuous renewal of curriculum, policies, and methods.

<u>Personnel management</u>: The academy administrator manages personnel effectively through activities such as the following: delegating appropriately; recognizing exemplary performance of teachers and staff; encouraging personal and professional growth and leadership among the staff; complying with applicable personnel policies and rules; securing the necessary personnel resources to meet objectives; and evaluating the job performance of assigned personnel.

<u>Management of administrative, fiscal, and facilities functions</u>: The academy administrator manages administrative, fiscal, and facilities functions responsibly through activities such as the following: obtaining Board based input for fiscal or financial analysis; compiling reasonable budgets and cost estimates; ensuring that facilities are maintained and upgraded as necessary; and managing a Board range of school operations (for example, attendance, accounting, payroll, transportation).

<u>Student management</u>: The academy administrator promotes positive student conduct through activities such as the following: helping students develop a sense of self-worth; developing and communicating guidelines for student conduct; ensuring rules are observed uniformly; disciplining students for misconduct in an effective and fair manner; supporting collaboration by working with faculty; and encouraging the participation of students and parents. <u>School or community relations</u>: The academy administrator promotes a positive tone for school or community relations through activities such as the following: fostering collaborative educational efforts among members of the total school community; articulating the school mission and needs to the community; seeking support for school programs; and involving himself or herself in community activities that foster rapport between the school district and the larger community.

<u>Professional growth and development</u>: The academy administrator provides leadership in professional growth and development through activities such as the following: participating actively in professional associations; conducting himself or herself in an ethical and professional manner; disseminating ideas and information to other professionals; and seeking and using evaluative information for improvement of performance.

<u>School board relations</u>: The Headmaster promotes and supports a positive relationship with the school district board of trustees through activities such as the following: meeting the board's needs for information; interacting with board members in an ethical, sensitive, and professional manner; demonstrating competence in written and verbal communications to the board; and recommending policies to the board to enhance teaching and learning.

## **Teachers and Other Instructional Staff**

Federal law requires that charter school teachers in core academic subjects (English, reading or language arts, mathematics, science, foreign languages, civics and government, economics, arts [theater arts, dance, music, and art], history, and geography) have a bachelor's degree and demonstrate competency in the core academic subject area(s) assigned. See the No Child Left Behind (NCLB) bulletins for further information regarding required teacher qualifications at http://www.tea.state.tx.us/index4.aspx?id=4261&menu\_id=798.

Charter school teachers assigned to teach subjects that are not considered core academic subjects under the NCLB must meet the state law minimum requirement of a high school diploma. Furthermore, state law and rule require charter school teachers assigned to teach special education, bilingual education, and English as a second language to be appropriately certified.

a) Submit as Attachment I, a Supplemental Human Resources Information Form for all teacher and other instructional staff positions. A sample of the Supplemental Human Resources Information Form is included in Appendix III. The actual form that must be completed is an online form that is located at <u>http://www.tea.state.tx.us/index.aspx?id=3475</u>. A Supplemental Human Resources Information Form must be completed for the positions of teacher, educational aide, counselor, librarian, and any other staff position that the proposed school anticipates filling during the staffing process. General salary information for specific school districts and for the state as a whole may be found at http://ritter.tea.state.tx.us/perfreport/snapshot/2010/index.html. Specific salary information may be purchased from the Texas Association of School Boards at https://www.tasb.org/apps/tasbstore/storeCategory.cfm?cat=3. Note that charter schools may not compensate an individual in excess of the fair market value of the services rendered. The fair market value of the services rendered is based on the individual's education, experience, prior salary history, job duties actually performed, and what a typical person with similar skills, experience, and job duties would earn. See 19 TAC, §100.1022(c)(2)(B)(i). (Note that TEC, §12.130 requires charter schools to provide the parent or guardian of each student enrolled in the school written notice of the qualifications of each teacher employed by the school.)

Attachment I contains a Supplemental Human Resources Information Form for all teacher and other instructional staff positions.

### b) Describe professional development opportunities that will be offered to teachers and other instructional staff.

Great Hearts recognizes the necessity of quality faculty training and professional development. Each Great Hearts faculty member participates in a significant number of hours of training and internal professional development each year, with activities ranging from the network-wide collaborative Great Hearts Summit to faculty mentoring programs at their school sites.

Great Hearts distributes an annual newsletter to all employees on local and national professional development activities aligned to the values of the academic program.

Teachers will have planning time and ongoing professional development opportunities:

- The majority of Great Hearts faculty will take advantage of summer professional development within their first three years of employment.
- 2. All new Great Hearts faculty will spend the month of July in on-site training, new faculty orientation, the Great Hearts Faculty Summit, and course preparation.
- c) Explain the method(s) and timelines that will be used to evaluate teachers and other instructional staff. Designate the responsible party for the evaluations.

#### Monitoring and Evaluation by Headmaster

All teachers will be formally evaluated by the headmaster at least once per semester in their first and second years teaching at Great Hearts America—Texas (though they are informally observed with far greater frequency). The evaluation will consist of a classroom observation, a follow-up meeting between the teacher and the headmaster, and a written evaluation by the headmaster. Headmaster's evaluations will be tied to meeting school goals and individual objectives for the students and are reflected in the evaluation rubric that is ultimately used to determine annual performance-based bonus.

**Teachers' Portfolios** 

**Great**Hearts

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The written evaluations are kept in the teacher's portfolios, along with samples of the teaching materials that the individual teachers create for their classes. These samples are submitted to the headmaster throughout the year and are shared among the faculty to improve curriculum and instruction. They are also used as dynamic assessment used to assure that student progress is understood and monitored. The documents in the teaching portfolios are used as a means for evaluating the teachers' implementation of Great Hearts America – San Antonio's curricular philosophy and the common core and state academic standards.

The Great Hearts curriculum and common core standards are aligned to the TEKS and will be evident in high STARR and Stanford 10 scores in the first and subsequent years. Great Hearts' curriculum is modeled after the other successful schools in the Great Hearts network of schools, which have a proven track record of outstanding student achievement.

#### PEIMS Coordinator, Student Attendance Staff, and Other Staff

a) Submit as Attachment I, a Supplemental Human Resources Information Form for the PEIMS coordinator, the student attendance staff position, and any other staff positions. A sample of the Supplemental Human Resources Information Form is included in Appendix III. The actual form that must be completed is an online form that is located at http://www.tea.state.tx.us/index.aspx?id=3475. A Supplemental Human Resources Information Form must be completed for the PEIMS coordinator, student attendance staff, and any other staff positions that the proposed school anticipates filling during the staffing process. General salary information for specific school districts and for the state as a whole may be found at http://ritter.tea.state.tx.us/perfreport/snapshot/2010/index.html. Specific salary information may be purchased from the Texas Association of School Boards at

https://www.tasb.org/apps/tasbstore/storeCategory.cfm?cat=3. Note that charter schools may not compensate an individual in excess of the fair market value of the services rendered. The fair market value of the services rendered is based on the individual's education, experience, prior salary history, job duties actually performed, and what a typical person with similar skills, experience, and job duties would earn. See 19 TAC, §100.1022(c)(2)(B)(i).

Attachment I contains a Supplemental Human Resources Information Form for the PEIMS coordinator/the student attendance staff position.

Describe professional development opportunities that will be offered to the PEIMS coordinator, student attendance staff, and any other staff not already addressed.

Great Hearts will access professional development for the PEIMS coordinator and student attendance staff from Region 20, San Antonio.

# REVISED DURING CONTINGENCY PROCESS. SEE INSERT.

Explain the method(s) and timelines that will be used to evaluate the PEIMS coordinator, student attendance staff, and any other staff not already addressed. Designate the responsible party for the evaluations. SAS 536-12 RFA 701-11-108 37

The Headmaster and Board of Directors will assess the performance of the PEIMS Coordinator and/ or student attendance staff on a yearly basis. The timely submittal of accurate reports will be the primary focus of the assessment.

#### 11. Business Plan

Financial History of Sponsoring Entity

a) Discuss the sources of funding used by the sponsoring entity to start up its operations.

Great Hearts America—Texas has already received a pledge for \$1 million from one local foundation in San Antonio and another has visited Great Hearts Academies in Arizona and is considering a grant for a potential expansion of the public charter school network in San Antonio, Texas. In addition, Great Hearts has been a portfolio member of the Charter School Growth Fund for several years and anticipates receiving additional startup and CMO-scaling grants from the national philanthropic organization.

Attachment J contains a statement that no documents are being provided in because the sponsoring entity (Great Hearts America -- Texas) was incorporated after January 1, 2010, and has less than \$5,000 in receipts and total assets. However, we expect to see a significant increase in current assets from pledged philanthropic contributions.

 b) Discuss the changes in current assets of the sponsoring entity since the date of the most recent audit report submitted as Attachment J. (Current Asset – Those assets which are reasonably expected to be realized in cash or sold/consumed within a year or within the normal operating cycle of the entity)

Attachment J contains a statement no documents are being provided because the sponsoring entity (Great Hearts America – Texas) was incorporated after January 1, 2010, and has less than \$5,000 in receipts and total assets. However, we expect to see a minor increase in current liabilities as we incur some start-up costs over the coming months

c) Discuss the changes in current liabilities of the sponsoring entity since the date of the most recent audit report submitted as Attachment J. (Current Liabilities - Obligations whose liquidation is reasonably expected to require the use of existing resources properly classified as current assets or obligations that are due on demand or will be due on demand within one year)

Attachment J contains a statement no documents are being provided because the sponsoring entity (Great Hearts America -- Texas) was incorporated after January 1,

Explain the method(s) and timelines that will be used to evaluate the PEIMS coordinator, student attendance staff, and any other staff not already addressed. Designate the responsible party for the evaluations. SAS 536-12 RFA 701-11-108 37

The Headmaster and Board of Directors will assess the performance of the PEIMS Coordinator and/ or student attendance staff on a yearly basis. The timely submittal of accurate reports will be the primary focus of the assessment.

#### 11. Business Plan

Financial History of Sponsoring Entity

 Discuss the sources of funding used by the sponsoring entity to start up its operations.

Great Hearts America – Texas has already received a-pledges for \$3.254 million from ene-local foundations in San Antonio-and another has visited Great Hearts Academies in Arizona and is considering a grant for a-potential expansion of the public charter school network in San Antonio, Texas. In addition, Great Hearts has been a portfolio member of the Charter School Growth Fund for several years and was approved on March 11, 2013 to anticipates receiveing additional startup and CMO-scaling grants from the national philanthropic organization, much of it will be directed to Great Hearts America – Texas.

Attachment J contains a statement that no documents are being-provided in because the sponsoring entity (Great-Hearts-America Texas) was incorporated after January 1, 2010, and has less than \$5,000 in receipts and total assets. However, we expect to see a significant increase in current assets from pledged philanthropic contributions.

b) Discuss the changes in current assets of the sponsoring entity since the date of the most recent audit report submitted as Attachment J. (Current Asset – Those assets which are reasonably expected to be realized in cash or sold/consumed within a year or within the normal operating cycle of the entity)

Attachment J contains a statement no documents are being provided because the sponsoring entity (Great Hearts America – Texas) was incorporated after January 1, 2010, and has less than \$5,000 in receipts and total assets. However, we expect to see a minor increase in current liabilities as we incur some start-up costs over the coming months

c) Discuss the changes in current liabilities of the sponsoring entity since the date of the most recent audit report submitted as Attachment J. (Current Liabilities - Obligations whose liquidation is reasonably expected to require the use of existing resources properly classified as current assets or obligations that are due on demand or will be due on demand within one year) 2010, and has less than \$5,000 in receipts and total assets. However, we expect to see a minor increase in current liabilities as we incur some start-up costs over the coming months

d) Disclose any liens, litigation history, and/or any sanctions from any local, state and/or federal regulatory agency against the sponsoring entity. For the purpose of this application "litigation" includes civil suits, bankruptcy proceedings, and any administrative process in which an agency of the federal, state or local government has taken adverse licensing or disciplinary action. "Sponsoring entity" includes any organization, whether incorporated or not, to which the sponsoring entity is successor in interest; any organization, whether incorporated or not, which the sponsoring entity has purchased; and, any organization, whether incorporated or not, for which the sponsoring entity has taken possession of substantially all assets previously possessed by that organization.

There are no any liens, litigation history, and/or any sanctions from any local, state and/or federal regulatory agency against Great Hearts America—Texas.

 e) State the names of any open-enrollment charters already held by the sponsoring entity.

Great Hearts America-Texas will open its first Texas charter in San Antonio.

- f) Submit, as Attachment J, a copy of the most recent audit report. If an audit report is not available, provide one of the following:
  - an unaudited financial statement consisting of:
  - an unaudited statement of financial position,
  - an unaudited statement of activities, and
  - an unaudited statement of cash flows (The unaudited financial statements must include a notarized acknowledgement signed by the board chair and chief financial officer of the sponsoring entity attesting to the accuracy and completeness of the information provided.)

**Notes:** The structure of the required financial statements must be in the format provided in the most recent version of the Financial Accountability System Resource Guide, Special Supplement-Charter Schools (Module 10) found at http://www.tea.state.tx.us/index4.aspx?id=1222. The chair of the sponsoring entity is the highest ranking official of the entity, regardless of the term used by the entity to designate this official. The chief financial officer (CFO) is the person who oversees the finances of the sponsoring entity, regardless of the term used by the entity to designate this official. The unaudited financial statement must contain all three statements and both required signatures and must be notarized, or this attachment will be considered incomplete, resulting in the removal of the application from the process.

 g) a statement that no documents are being provided because the sponsoring entity was incorporated after January 1, 2010, and has less than \$5,000 in receipts and total assets.

Attachment J contains a statement that no documents are being provided because the sponsoring entity (Great Hearts America—Texas) was incorporated after January 1, 2010, in February 2012, and has less than \$5,000 in receipts and total assets. The assets of Sister Creek for the Liberal Arts did not transfer during the reformation.

h) Submit, as Attachment K, a credit report of the sponsoring entity. If the sponsoring entity was incorporated after January 1, 2010, and has less than \$5,000 in receipts and total assets, it is not required to provide a credit report and may instead provide a statement that no documents are being provided because the sponsoring entity was incorporated after January 1, 2010, and has less than \$5,000 in receipts and total assets. A statement of not applicable will result in this item being considered incomplete and the removal of the application from the process. If the entity was incorporated prior to January 1, 2010, and there is no credit history, a response from one of the credit rating agencies must be attached indicating the entity has no credit history.

Attachment K contains statement that no documents are being provided in Attachment J because the sponsoring entity (Great Hearts America—Texas) was incorporated after January 1, 2010, in February 2012, and has less than \$5,000 in receipts and total assets. <u>The assets of Sister Creek for the Liberal Arts did not</u> <u>transfer during the reformation</u>.

i) Submit, as Attachment L, a copy of the most recently filed (IRS) Form 990. Note: Small tax-exempt organizations whose annual gross receipts are normally \$25,000 or less may be required to electronically submit Form 990-N, also known as the e-Postcard, unless they choose to file a complete Form 990 or Form 990-EZ. If the applicant submits the e-Postcard to the IRS, provide, in Attachment L, a copy of the information that was provided to the IRS. A copy of the submitted information can be located on the IRS website at "Annual Electronic Filing Requirements for Small Exempt Organizations – Form 990-N (e-Postcard)" or www.irs.gov/app/ePostcard/. If a Form 990 is not available, provide a statement that explains why a Form 990 (990-N) is not available. A statement of not applicable will result in this item being considered incomplete and the removal of the application from the process.

Attachment L contains statement that a Form 990 is not available because the sponsoring entity (Great Hearts America -- Texas) was incorporated after January 1, 2010, in February 2012, and has less than \$5,000 in receipts and total assets. The assets of Sister Creek for the Liberal Arts did not transfer during the reformation.

Current Operations of Sponsoring Entity

 a. If non-charter programs are currently operated by the sponsoring entity, describe how, or if, these non-charter programs will relate to the charter school.

N/A

REVISED DURING CONTINGENCY PROCESS SEE INSERT

b. If there are plans to begin operating any non-charter programs within the next two years, describe whether these non-charter programs will relate to the charter school.

N/A

c. If there are plans to begin operating any non-charter programs within the next two years, discuss the physical location of the programs. Describe how the charter school will maintain separate administrative, business, financial, payroll, personnel and other records.

N/A

# Start Up of Charter School Operations

k) Provide a statement describing the projected amounts of start-up funding. The statement must identify the amount of each source of funds and the specific source of funding (i.e., private donor, charitable foundation, local government, state/federal agency). Charter school applicants should be aware that the fiscal year of the charter school should end on August 31. Through a grant application process, federal funds may be available for up to 18 months of post-award planning and up to two years of implementation. However, start-up funds are available for no more than three years. Actual funding depends on the number of eligible charters, the completion of a successful competitive charter grant application, and the continuation of funds from the United States Department of Education. Start-up funding is not to be used for budget purposes, and, if awarded, will not be available to the sponsoring entity until the contract for charter has been executed, a county-district number has been assigned, and a grant application has been completed and negotiated. The federal funds may then only be accessed after a request for reimbursement has been submitted. Generally, the federal funds may not be received until after the charter holder has demonstrated that it has incurred an expenditure that represents an allowable cost pursuant to the requirements of the federal award.

Great Hearts America—Texas projects \$3M in revenues for start-up funding:

Charitable Foundation	Amount
The Brackenridge Foundation	\$1,000,000
The Ewing Halsell Foundation	\$2,000,000
Total	\$3,000,000

# APPROVED DURING CONTINGENCY PROCESS

Business Plan and Attachment M (p. 56) – Obtain written documentation from these donors that support the written statement shown in Section 11k, or revise Section 11k to accurately reflect the documentation provided in Attachment M.

Great Hearts America – Texas projects over \$3M in revenues for start-up funding, including at least \$1,375,000 which will be received before August 31, 2013

Charitable Foundation	Expected Amount to be received by August 31, 2013	Expected Amount to be received by August 31, 2014	Total Amount of Grants Pledged
The George W. Brackenridge Foundation	\$125,000	\$225,000	\$1,000,000
The Ewing Halsell Foundation	\$1,000,000	\$1,334,000	\$2,000,000
The San Antonio Area Foundation	\$250,000	\$250,000	\$250,000
Total	\$1,375,000	\$1,809,000	\$3,250,000

(See newly submitted Attachment M, in accordance with revised Section 11k)

Attachment M

San Antonio Area Foundation Where Giving and Community Connect

December 7, 2012

Daniel Scoggin, Ph.D. CEO Great Hearts America-Texas 3102 N. 56th Street, Suite 300 Phoenix, AZ 85018

Dear Dr. Scoggin:

The San Antonio Area Foundation enables our donors to effectively achieve their philanthropic goals. It is my pleasure to inform you that the San Anionio Area Foundation has approved this \$250,000.00 grant to Great Hearts America-Texas from the *High Performing Charter School Fund* of the San Antonio Area Foundation to support the opening of San Antonio's first Great Heart's charter school in 2013.

When communicating to the public regarding this grant, please identify it as "A grant from the High Performing Charter School Fund of the San Antonio Area Foundation."

If you have any questions, please feel free to contact us. Best wishes for continued success.

Sincerely,

is & SLDD

Donnis B. Noll President/Chief Excoutive Officer

Enclosuros

c: Victoria Ricco (w/o enc.) c: Jackie Moczygernga (w/o enc.)

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STANDARDS" Confirmed in Compliance with National Standards for U.S. Community Poundations

309 Hant Pearl Parkway, Suite 714 . San Antonio, Texas 78215 . p: 210,225,2249 . f: 210,225,1980 . www.apafdin.org



# APPROVED DURING CONTINGENCY PROCESS

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November 1, 2012

Dr. Daniel Scoggin Chief Executive Officer Great Hearts Academies 3102 N. 56th Street, Suits 300 Phoenix, AZ 85018

Dear Dr. Scoggin:

I am delighted to confirm that the Board of the San Antonio Area Foundation has approved a contingent \$250,000 grant to Great Hearts Texas from the Foundation's High Performing Charter School Fund. The grant will be distributed in 2012 upon the award of a charter by the Texas Board of Education for Great Hearts and is to be used toward startup costs to open schools in San Antonio, Texas.

None of the funds provided in this grant may be used, directly or indirectly, for the purpose of
participating in, or intervening in, any political campaign on behalf of (or in opposition to) any
candidate for elective public office.

I look forward to seeing you at the charter interview in Austin on Friday.

Sincerely,

is E glald

Dennis E. Noll

CF WARDAR

Configured in Compliance with National Standards for U.S. Community Pointed lines

110 Broadway, Sulle 250 \* Can Antonio, Texes 70205 \* Phone: 210.225.2243 \* Fax: 210.225.1980 \* Web: www.seafrin.org 205 of 267 GEORGE W. BRACKENNELDGE FOUNDATION 119 Taylor Street San Antonio, Texas 78205 Tr (210) 283-8075 · Par (210) 226-1718 WWW.BACKENDERFOUNDATION.ONG

January 1, 2013

Dr. Peter Bezanson, President Great Hearts America—Texas 3102 N. 56<sup>th</sup> Street, Suite 300 Phoenix, AZ 85018

APPROVED DURING CONTINGENCY PROCESS

:

Dear Dr. Bezanson:

On behalf of the George W. Brackenridge Foundation, I am delighted to enclose the first Installment, \$125,000, of the \$1,000,000 pledge to Great Hearts America -- Texas.

The relevant grant restrictions are;

(1) Great Hearts America-Texas must maintain its 50103 status and

(2) Funds may not be used for any political campaign purposes, to carry on propaganda or otherwise attempt to influence in any manner legislation of any governmental body, to influence the outcome of any public election, to carry on directly or indirectly, any voter registration drive, or to make any payment or use of Grant funds for any purpose other than charitable purposes described in Code section 170 (o)(2)(B).

It would be hard to overstate our excitement about Great Hearts' San Antonio expansion, We stand ready to assist in any way we can.

Sincepely,

Victoria B. Rico Chair & Trastee

VBR/km

co: Randy J. Boatright, Trustee David H.O. Roth, Trustee

206 of 267

CEORGE W, BRACKENETDGE FOUNDATION 119 Taylor Street Ban Antonio, Texas 78205 yel (20) 223-0075 - YAN (210) 220-1715 WWW.MILLERANDORFOUNDATION

> Taubites Victoria B. Nico - Ohairman Kandy J. Boatairki Stephanie Bhearer

February 20x 201

Dr. Peter Bezapson, President Great Electris America — Texas 3102 N. 56<sup>th</sup> Street, Suite 300 Phoenix, AZ 85018 APPROVED DURING CONTINGENCY PROCESS

Dear Dr. Bezanson

On behalf of the George W. Brackenridge Foundation, I am delighted to offer Great Hearts America—Texas a conditional multi-year grant commitment of \$1,000,000 over the next eight years. This grant is conditioned initially upon Great Hearts America— Texas obtaining a Texas observer and committing to open a charter school compus in San Antonio by Fall 2013. Distribution of grant funds would begin with \$125,000 in January of 2013 with subsequent distributions to be set by metual consent but in no case less that \$100,000 per year until the total of \$1,000,000 is reached, so long as performance and growth metrics are met, grant reatrictions are observed, and the asset value of the foundation does not drop by more than 30%.

The boards of Great Hearts America—Texas and the George W. Brackenridge Foundation will determine appropriate performance and growth metrics by mutual consent, possibly referencing the metrics established by the Charter School Growth Pund, if any, for Great Hearts America—Texas's San Antonio expansion.

The relevant grant restrictions are (1) Great Hearts America—Toxas must maintain its 501c3 status and (2) funds may not be used for any political campaign purposes, to carry on propaganda or otherwise attempt to influence in any manner legislation of any governmental body, to influence the outcome of any public election, to carry on directly or indirectly, any votor registration drive, or to make any puyment or use of Grant funds for any purpose other than charitable purposes described in Code section 170 (c)(2)(B).

It would be hard to overstate our excitoment about the potential for Great Hearts America......Texas to build classical education schools in San Antonio. Since your parent information mosting, the Brackenridge trustees have been overwhelmed with emails and phone calls from parents and oven a few other potential funders asking whether you are really coming.

#### THE EWING HALSELL FOUNDATION 711 NAVARRO - SUITE 737 SAN ANTONIO, TEXAS 78208-1735 (210) 283-2840 (210) 271-9089 FAX

December 17, 2012

Dr. Daniel Scoggin, Chief Executive Officer Dr. Peter Bezanson, Chief Academic Officer Great Hearts America-Texas 3102 N 56th Street, Suite 300 Phoenix, AZ 85018

APPROVED DURING CONTINGENCY PROCESS

Dear Dan and Peter:

I am writing as a follow up to the Bwing Halsell Foundation's (the "Foundation") letter dated October 22, 2012 awarding Great Hearts Americo-Texas ("Great Hearts") a multiyear grant. As stated in our letter, the Board of Directors of the Foundation approved a \$2,000,000 grant toward Great Hearts America-Texas educational network expansion into San Antonio including capital expenditures, debt service and operational expenses as described in your business plan (the "San Antonio Expansion Campaign") with the first Great Hearts Academy-San Antonic campus opening by fall 2014. The grant was to be made payable in four installments as outlined below. The Grant funds and appreciation, if any, are restricted and shall only be used for the educational charitable purpose of the San Antonio Expansion Campaign.

The agreement was contingent upon Great Hearts America-Texas receiving a Texas charter from the Texas Board of Education. We congratulate you on being approved for a Texas charter from the State Board of Education on November 16, 2012. Now that this contingency has been met, the Foundation's grant is payable as follows:

- Payment #1 \$1,000,000.00 payable after July 1, 2013 and before December 31, 2013
- Payment #2 \$234,000,00 payable after July 1, 2014 and before December 31, 2014
- Payment #3 \$333,000.00 payable after July 1, 2015 and before December 31, 2015
- Payment #4 \$333,000.00 payable after July 1, 2016 and before December 31, 2016

An annual report will be required before the Foundation will pay any Grant Instaliments. Details of the annual reporting requirements concerning academic performance, financial stability and growth can be found in Appendix A.

The Foundation, by the terms of its governing documents, can only provide funds that will be expended in Texas. Additionally, the Foundation requires that the recipient of a grant

BHF Grant Approval Letter-Great Hearts America-Texas December 17, 2012

must be an organization that qualifies as an Internal Revenue Code Section 501(c)(3) entity and is not a private foundation. We also require that the recipient of a grant cannot be engaged in carrying on propaganda or attempting to influence legislation as defined under the Internal Revenue Code. If Great Hearts does not meet these restrictions at any time during the Grant period, all funds must be returned immediately.

In addition, the Grant funds must be returned immediately if the San Antonio Expansion Campaign is cancelled. If there is a temporary delay in the project not exceeding twentyfour months, please notify the Foundation immediately and explain the reasons for the delay. If the delay exceeds twenty-four months, the Grant funds must be immediately returned and a new grant request may be made once the San Antonio Expansion Campaign is moving forward.

As a condition on the receipt of monies from this Grant, you and all other representatives of Great Hearts agree that the existence, as well as the terms of this Grant, are strictly confidential. Therefore, you shall not disclose the existence and or terms of this Grant to any third party, unless authorized by the Foundation in writing.

Acceptance of this Grant, by depositing or endorsing the check, means you have agreed to the terms of the Grant herein and creates a right in the Foundation, through its Board of Directors, to enforce the terms of the Grant. The Foundation has the right to inquire into and inspect documentation related to the expenditures made with respect to these Grant funds to ensure that the restrictions detailed above are complied with.

We respectfully request acknowledgement of receipt and acceptance of the terms of this amended and restated Grant at your earliest convenience by signing this letter below and returning a copy to the Foundation. Please understand that although payable over a multiyear period, the Foundation's Grant is a one-time gift and shall not be considered a basis for continued support in the future.

We are firmly committed to supporting Great Hearts expansion into the San Antonio education market, providing San Antonio students and families a high quality choice and great educational opportunity to prepare the student for success in college, career and life. We look forward to the opening of the first Great Hearts Academy-San Antonio campus in the very near future!

Best regards,

Jackle J. Mockyghmba Foundation Managar

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EHF Grant Approval Letter-Great Hearts America-Texas December 17, 2012

#### APPENDIX A: ANNUAL REPORTING METRICS & MILEBTONES

APPROVED DURING CONTINGENCY PROCESS

Please provide in written format the following information that is applicable to the Great Hearts America-Texas growth model in San Antonio, Texas,

#### **AOADEMIC AOHIEVEMENT**

- Student Results
  - o Archway Classical Academtes
    - Provide nationally normed test results for each grade level and documentation that proficiencies rates exceed national averages
    - Provide state assessment results for each grade level and documentation that proficiency rates exceed state averages
  - o Preparatory Academies
    - Provide ACT, SAT, PSAT, and PLAN test results for each grade level and documentation that scores exceed national averages
    - Provide student-level college application results (names redacted) for all graduates and documentation that 100% of students are accepted to college and 50%+ are accepted to more or most selective colleges (and measured by US News and World Report)
- All Great Hearts schools achieve the highest state label by their 2<sup>nd</sup> full year and maintain that label for each year thereafter

#### FINANCIAL SUSTAINABILITY

- Provide annual revenue & expense summaries and supporting details where necessary.
- Provide current fundraising status for the San Antonio expansion campaign.

#### GROWTH/OPERATIONS

- New School Launch on time and on target
  - o Location Identified
  - o School Leader Identified
  - o Teacher recruitment update
  - o Schools launched on time per Great Heart's master plan
  - o Reach anticipated number of seats by target dates
  - o Waiting list update

The Foundation also expects Great Hearts to remain in good standing with the Charter School Growth Fund.

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### APPROVED DURING CONTINGENCY PROCESS

THE EWING HALSHIL FOUNDATION 711 Navarro - Sume 737 San Antonio, Texas 78205-1735 (210) 223-2640 (210) 271-9089 Fax

October 22, 2012

Dr. Daniel Scoggin, Chief Executive Officer Dr. Peter Bezanson, Chief Academic Officer Great Hearts America-Texas 3102 N 56th Street, Suite 300 Phoenix, AZ 85018



Dear Dan and Peter:

I am writing as a follow up to the Ewing Halsell Foundation's (the "Foundation") letter dated June 4, 2012 awarding Great Hearts America-Texas ("Great Hearts") a multi-year grant. This Amended Grant Approval Letter amends our prior letter and will control both the Foundation's and Great Hearts' obligations from this date forward. As stated in our previous letter, the Board of Directors of the Foundation approved a \$2,000,000 grant toward Great Hearts America-Texas educational network expansion into San Antonio including capital expenditures, debt service and operational expenses as described in your business plan (the "San Antonio Expansion Campaign"). The Grant funds and appreciation, if any, are restricted and shall only be used for the educational charitable purpose of the San Antonio Expansion Campaign.

Texas Property Code Section 1.63.007(a) provides that if the donor of a gift instrument consents in writing, on paper or in electronic form, an institution can modify the restriction in the gift instrument related to the management, investment, or purpose of the funds. Pursuant to this provision, the Foundation would like to modify the \$2,000,000.00 grant to amend the grant payout schedule as discussed below.

This grant remains contingent upon Great Hearts receiving a Texas charter from the Texas Board of Education and Great Hearts America's commitment to opening a network of Great Hearts schools in San Antonio, Texas. Due to delays in the Texas charter process, the Foundation acknowledges the operational issues that can arise from attempting to open a school amid such time constraints. The Foundation desires that Great Hearts has a successful school opening in San Antonio, and does not in any way want to pressure Great Hearts into a 2013 opening if that is not the most prudent path to take.

To that end, the Board decided to amend the grant payout schedule to permit Great Hearts to open its initial campus in fall 2013 or fall 2014. EHF Grant Approval Letter-Great Hearts America-Texas October 22, 2012

# APPROVED DURING CONTINGENCY PROCESS

Upon satisfying all requirements and restrictions, the Grant will be payable as is the second

- Payment #1 \$1,000,000.00 payable after July 1, 2013 and before December 31, 2013
- Payment #2 \$334,000.00 payable after July 1, 2014 and before December 31, 2014
- Payment #3 \$333,000.00 payable after July 1, 2015 and before December 31, 2015
- Payment #4 \$333,000.00 payable after July 1, 2016 and before December 31, 2016

This Grant is contingent upon Great Hearts receiving its Texas charter in the fall of 2012 and Great Hearts commitment to open its initial campus in San Antonio by the fall of 2014. An annual report will be required before the Foundation will pay any Grant installments. Details of the annual reporting requirements concerning academic performance, financial stability and growth will be determined by reasonable mutual agreement between the Foundation and Great Hearts.

The Foundation, by the terms of its governing documents, can only provide funds that will be expended in Texas. Additionally, the Foundation requires that the recipient of a grant must be an organization that qualifies as an Internal Revenue Code Section 501(c)(3) entity and is not a private foundation. We also require that the recipient of a grant cannot be engaged in carrying on propaganda or attempting to influence legislation as defined under the Internal Revenue Code. If Great Hearts does not meet these restrictions at any time during the Grant period, all funds must be returned immediately.

In addition, the Grant funds must be returned immediately If the San Antonio Expansion Campaign is cancelled. If there is a temporary delay in the project not exceeding twentyfour months, please notify the Foundation immediately and explain the reasons for the delay. If the delay exceeds twenty-four months, the Grant funds must be immediately returned and a new grant request may be made once the San Antonio Expansion Campaign is moving forward.

As a condition on the receipt of monies from this Grant, you and all other representatives of Great Hearts agree that the existence, as well as the terms of this Grant, are strictly confidential. Therefore, you shall not disclose the existence and or terms of this Grant to any third party, unless authorized by the Foundation in writing.

<u>Acceptance of this Grant, by depositing or endorsing the check, means you have agreed to</u> the terms of the Grant herein and creates a right in the Foundation, through its Board of Directors, to enforce the terms of the Grant. The Poundation has the right to inquire into and inspect documentation related to the expenditures made with respect to these Grant funds to ensure that the restrictions detailed above are complied with.

We respectfully request acknowledgement of receipt and acceptance of the terms of this amended and restated Grant at your earliest convenience by signing this letter below and returning a copy to the Foundation. Please understand that although payable over a multiEHF Grant Approval Letter-Great Hearts America-Texas October 22, 2012

2.1

year period, the Foundation's Grant is a one-time gift and shall not be considered a basis for continued support in the future.

We are firmly committed to supporting Great Hearts expansion into the San Antonio education market, providing San Antonio students and families a high quality choice and great educational opportunity to prepare the student for success in college, career and life.

Best regards,

Foundation Manager

The undersigned hereby agrees to all restrictions of the Grant as defined in this Amended Grant Approval Letter.

Great Hearts America-Texas

By: Pariel Director SCRAA

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APPROVED DURING CONTINGENCY PROCESS

THE EWING HALSELL FOUNDATION 711 Navarro - Suite 737 San Antonio, Texas 78205-1738 (210) 223-2640 (210) 271-9088 Fax

June 4, 2012

## APPROVED DURING CONTINGENCY PROCESS

Dr. Daniel Scoggin, Chief Executive Officer Dr. Peter Bezanson, Chief Academic Officer Great Hearts America-Texas 3102 N 56th Street, Suite 300 Phoenix, AZ 85018

Dear Dan and Peter:

1.24

In a recent meeting, the Board of Directors of the Ewing Halsell Foundation (the "Foundation") discussed and approved a grant to attract and grow the Great Hearts America public charter school model in the San Antonio area. I am delighted to tell you that funds were approved in the amount of \$2,000,000.00 (the "Grant") toward Great Hearts America-Texas educational network expansion into San Antonio including capital expenditures, debt service and operational expenses as described in your business plan (the "San Antonio Expansion Campaign"). The Grant funds and appreciation, if any, are restricted and shall only be used for the educational charitable purpose of the San Antonio Expansion Campaign.

The following are the Foundation's requirements and restrictions on the Grant. The Grant is contingent upon Great Hearts America-Texas receiving a Texas charter from the Texas Board of Education and Great Hearts America's commitment to opening a network of Great Hearts America-Texas schools in San Antonio, Texas with the initial campus opening fall 2013.

The Foundation, by the terms of its governing documents, can only provide funds that will be expended in Texas. Additionally, the Foundation requires that the recipient of a grant must be an organization that qualifies as an internal Revenue Code Section 501(c)(3) entity and is not a private foundation. We also require that the recipient of a grant cannot be engaged in carrying on propaganda or attempting to influence legislation as defined under the Internal Revenue Code. If Great Hearts America-Texas does not meet these restrictions at any time during the Grant period, all funds must be returned immediately.

In addition, the Grant funds must be returned immediately if the San Antonio Expansion Campaign is cancelled. If there is a temporary delay in the project not exceeding twentyfour months, please notify the Foundation immediately and explain the reasons for the

#### APPROVED DURING CONTINGENCY PROCESS

BHF Grant Approval Letter- Great Hearts America-Texas

delay. If the delay exceeds twenty-four months, the Grant funds must be immediately returned and a new grant request may be made once the San Antonio Expansion Campaign is moving forward.

Upon satisfying all requirements and restrictions, the Grant will be payable after July 1, 2013 in two annual installments of \$1,000,000.00. This Grant is contingent upon Great Hearts America-Texas receiving its Texas charter in the fall of 2012 and Great Hearts America-Texas commitment to open its initial campus in San Antonio by the fall of 2013. An annual report will be required before the Foundation will pay any Grant installments. Details of the annual reporting requirements concerning academic performance, financial stability and growth will be determined by reasonable mutual agreement between the Foundation and Great Hearts America-Texas.

As a condition on the receipt of monies from this Grant, you and all other representatives of Great Hearts America-Texas agree that the existence, as well as the terms of this Grant, are strictly confidential. Therefore, you shall not disclose the existence and or terms of this Grant to any third party, unless authorized by the Foundation in writing.

Acceptance of this Grant, by depositing or endorsing the check, means you have agreed to the terms of the Grant herein and creates a right in the Foundation, through its Board of Directors, to enforce the terms of the Grant. The Foundation has the right to inquire into and inspect documentation related to the expenditures made with respect to these Grant funds to ensure that the restrictions detailed above are complied with.

We respectfully request acknowledgement of receipt and acceptance of the terms of the Grant at your earliest convenience by signing this letter below and returning a copy to the Foundation. Please understand that although payable over a multi-year period, the Foundation's Grant is a one-time gift and shall not be considered a basis for continued support in the future.

We firmly believe that Great Hearts America-Texas can and will be a school of choice for San Antonio parents and students who want a better education that will prepare the student for success in college, career and life. The Foundation is pleased to partner with Great Hearts America-Texas in this endeavor.

Best regards,

klef. Mockyge Foundation Manager

EHF Grant Approval Letter- Great Hearts America Texas "... June 4, 2012

# APPROVED DURING CONTINGENCY PROCESS

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The undersigned hereby agrees to all restrictions of the Grant as defined in this letter.

Great Hearts America-Texas

Director COLLIN.

THE EWING HALSELL FOUNDATION 711 NAVARRO - SUITE 727 SAN ANTONIO, TEXAB 78208-1738 (210) 282-2840 (210) 271-8089 FAX

# APPROVED DURING CONTINGENCY PROCESS

#### February 20, 2012

Dr. Daniel Scoggin, Chief Executive Officer Dr. Peter Bezanson, Chief Academic Officer **Great Hearts Academies** 3102 N 56th Street, Sulte 300 Phoenix, AZ 85018

Dear Dan and Peteri

7

This letter serves as evidence that the Bwing Halsell Foundation's Board of Directors ("the Board") visited two (2) Great Hearts schools on February 13, 2012 and is considering a grant toward Great Hearts Academies proposed expansion of its public charter school model in San Antonio, Texas. The Board will continue to follow Great Hearts' status in obtaining a Texas charter and in reviewing your business plan to expand and grow in San Antonio, Texas.

Please let me know if you have any questions. Thank you!

Best regards,

Jackid J. Moczygendba

Foundation Manager

Account Details

1

## Arizona

Companyl GREAT HRARTS ACADEMIES

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218 of 267 https://www.arizbankonline.com/onlineserv/CM/olaa.cgi  Submit, as Attachment M, documentation (i.e., letters of credit, letters from donors, loan agreements, notices of grant awards, etc.) verifying all nongovernmental sources of funding. Letters of support for the proposed school should not be included in Attachment M. If there are no such sources of funds, state this in the attachment. A statement of not applicable will result in this item being considered incomplete and the removal of the application from the process.

Attachment M contains documentation (i.e., letters of credit, letters from donors, loan agreements, notices of grant awards, etc.) verifying all nongovernmental sources of funding.

#### Describe the process by which the annual budget of the charter school will be adopted.

The head master will develop a school budget based on Texas law and the needs of the school program. Pursuant to Texas School Law, the Great Hearts annual school budget will be adopted no later than the month of July prior to the school year.

#### Start-Up Timeline

Upon approval of the charter application and signing of the charter contract, the following timeline for actions will become effective with specific dates:

#### By February 28, 2012 (Planning Stage)

- Finalize the Governing Board and engage the members into the active agenda
- Develop Student Handbooks
- Further research curriculum materials and make improvements
- Develop personnel policy and procedures handbook
- Start implementing Phase Two of the marketing plan

#### By March 3, 2012 (Planning Stage)

- Locate a facility and plan on any necessary improvements
- Finalize and sign facility lease agreement
- The Governing Board finalizes and adopts all policies and procedures
- Implement Marketing Strategy hold community meetings with school Headmaster and
- School Board members
- Start enrollment of students

By June 30, 2013 (End of Planning Stage - School Opens)

- Recruit faculty and staff
- Secure support services, such as fiscal support (accounting, budget, payroll, banking,
- auditing, purchasing), insurance, staff benefits, telecommunications, legal advice,
- custodial service, etc
- Engage new faculty and staff members into implementation of the school plan

57

- Formalize the instructional program. Select and purchase instructional materials, choose
- materials for assessing student achievement, and plan professional development
- Sign contracts with all outside vendors and service providers
- Purchase and set up software and technology systems for front office, student records,
  - and state reporting
- Collect and verify and submit student counts to Arizona Department of Education,
- School Finance Division
- Establish and maintain regular monthly meeting of the Governing Board
- Continue enrollment of students

During July (School Opens – Final Preparations for First Day of School)

- First Professional In-Service
- Delivery of all equipment, books, supplies, instructional materials
- Implementation of school plan
- Continue enrollment of students
- Concentrate on marketing campaign and enrollment of students
- Each teacher prepares her/his classroom for first day of school
- Prepare the school for the first day of school

#### Start-Up Expenses with Assumptions

The start-up budget reflects the start-up plan. The Start-Up Budget reflects planning activities in the pre-opening period of Great Hearts – San Antonio. The start-up budget reflects all pre-opening activities that would make the new school an effectively functioning educational unit and supports the timeline of the program. The start-up budget is well balanced and the start-up expenses will not exceed the start-up funds.

a) Submit, as Attachment N, a start-up budget; the electronic version of this template can be found at http://www.tea.state.tx.us/index.aspx?id=3475. A sample can be seen in Appendix IV. Note that only this start-up budget template will be accepted for the purposes of this application. To complete the start-up budget template, use the Special Supplement To Financial Accounting and Reporting, Nonprofit Charter School Chart of Accounts which may be found at

http://www.tea.state.tx.us/index4.aspx?id=1222. The start-up budget must include the period between the date that the charter is awarded by the State Board of Education and the date that the proposed charter school will begin operations. The start-up budget must identify all sources of funding and anticipated expenses. The private or local sources of funding must be supported by the documentation included in Attachment M. The revenues and expenses for each entry in the budget template must be supported with written calculations indicating how the amounts were derived. (For example, 3 teachers @ \$30,000 annual salary = \$90,000 salaries or wages entered to line 6119. These written calculations should be attached following the printout of the completed start-up budget template). Attachment N contains a start-up budget.

 b) Submit, as Attachment O, a budget for the first year of operations; the electronic version of this template can be found at

http://www.tea.state.tx.us/index.aspx?id=3475. A sample can be seen in Appendix V. If an escalating enrollment is planned and the annual increase in enrollment exceeds 50% of the Year 1 enrollment, a budget must be included for each year that an increase in enrollment is requested up to Year 3. Note that only the budget template will be accepted for purposes of this application. For additional information to use when completing the budget template, see the Special Supplement To Financial Accounting and Reporting, Nonprofit Charter School Chart Of Accounts which may be found at

http://www.tea.state.tx.us/index4.aspx?id=1222. Be advised that funding is only earned for a maximum of 180 days per school year. The budget for the first year of operations must include the period after the date that the proposed charter school will commence operations. The budget must identify all sources of funding and anticipated expenses. Open-enrollment charter schools may offer either a half-day or full-day prekindergarten program; however, foundation funding for each prekindergarten student is based on half-day eligibility (the student must be scheduled for at least 120 minutes daily to be eligible for half-day prekindergarten.) Please see the Student Attendance Accounting Handbook for additional information.

http://www.tea.state.tx.us/index2.aspx?id=7739&menu id=645&menu id2=789 Charters may offer either a half-day or full-day (120 minutes of instruction per day for half-day eligibility or 240 minutes of instruction per day for full-day eligibility) kindergarten program. If students are enrolled in a full-day program (240 minutes of instruction per day), the charter is entitled to full-day funding. Charters offering half-day programs may not count students who attend both the morning and afternoon half-day sessions for eligible full-day attendance. The private or local sources of funding must be supported by the documentation included in Attachment M. State and federal sources of funding must be supported with a written statement or schedule indicating how the amounts were derived. The expenses for each entry in the template must be supported with written calculations indicating how the amounts were derived. (For example, 3 teachers @ \$30,000 annual salary = \$90,000 salaries or wages entered to line 6119.) It is important to budget conservatively and to consider that charter schools often have lower than anticipated attendance rates in the first year of operation. Therefore, a reasonable planning estimate is \$5,100 per student which accounts for a daily attendance rate of 80%. However, a higher daily ADA and/or attendance estimate percentage may be used in the budget if an explanation for the additional funding, with written calculations, is included. A useful source for calculating additional funding can be found under State Funding Worksheets located at the following TEA website:

http://www.tea.state.tx.us/index2.aspx?id=7721&menu\_id=645. All written calculations should be included in the application following the completed budget template for the corresponding year. Note: Consistency between staffing proposed in Section (Human Resources) and the proposed budgets will be reviewed. Attachment O contains a budget for the first year of operations.

#### Management Company and Other Contracted Services

a) Describe the manner in which an annual audit of the financial and programmatic operations of the program is to be conducted.

Great Hearts will undergo an end-of-year independent audit annually to the satisfaction of all requirements outlined in the charter contract by the charter authorizer.

 b) Identify any organization(s) and/or individual(s) that will provide financial accounting, payroll, and/or tax accounting services for the proposed charter school.

Most of the financial accounting, payroll, and tax accounting services for Great Hearts America—Texas at the San Antonio location will initially be provided through Great Hearts America –Texas's relationship with Great Hearts Academies, Inc., a non-profit charter management organization serving twelve schools in Arizona. Great Hearts Academies, Inc. has been supporting charter schools since 2002 by providing general bookkeeping, accounts payable, payroll and grants administration services.

Additionally, Great Hearts Academies, Inc. has historically engaged Fester & Chapman, P.C. (Phoenix, AZ) to perform independent audits and assist in the preparation of IRS Form 990 filings. We would anticipate engaging Fester & Chapman for Great Hearts Academies—Texas or a similarly qualified tax and accounting firm through a competitive bid process.

c) Discuss the qualifications of the organization(s) and/or individual(s). Include a list of any current or former clients that were charter schools.

Great Hearts Academies, Inc. has been supporting charter schools since 2002 and has the requisite staffing and expertise to deliver financial services, including a team of school accountants, accounts payable staff, a payroll department (which interfaces with ADP, a national leader in payroll services) and a grants administrator.

Fester & Chapman, P.C. (Phoenix, AZ) has several charter schools in their portfolio of clients. Besides the twelve Great Hearts Academies, they also provide services to nationally recognized BASIS Schools and several other nonprofit charter school organizations.

d) Submit, as Attachment P, a copy of the negotiated service agreement(s) with any organization(s) and/or individual(s) that will provide financial accounting, payroll, and/or tax accounting services for the proposed charter school. If the charter school intends to enter into such an agreement, and if the agreement is not available on the date that the application is submitted, include a letter of agreement or understanding outlining the terms negotiated to date. If the charter holder does not intend to enter into such an agreement, state this in the attachment. A statement of not applicable will result in this item being considered incomplete and the removal of the application from the process.

Attachment P contains a statement regarding negotiated service agreement(s) with any organization(s) and/or individual(s) that will provide financial accounting, payroll, and/or tax accounting services for the proposed charter school.

Most of the financial accounting, payroll, and tax accounting services for Great Hearts America—Texas will initially be provided through Great Hearts Academies, Inc., a non-profit charter management organization serving twelve schools in Arizona. No terms haves been negotiated to date between Great Hearts America – Texas and Great Hearts Academies, Inc. However if a negotiated service agreement is entered into, we would expect that the terms will be relatively consistent with past practices of Great Hearts Academies, Inc. whereby the charter school will pay for professional services associated with the launch and startup of the school, facilities maintenance and back office administrative services (e.g. accounting, payroll, etc.).

Additionally, Great Hearts Academies, Inc. has historically engaged Fester & Chapman, P.C. (Phoenix, AZ) to perform independent audits and assist in the preparation of IRS Form 990 filings. We would anticipate engaging Fester & Chapman for Great Hearts America—Texas or a similarly qualified tax and accounting firm through a competitive bid process.

e) Indicate whether the charter holder will adopt the provisions of Texas Education Code (TEC), Chapter 44, Subchapter B, as the process for awarding a contract for the construction, repair, or renovation of a structure, road, highway, or other improvement or addition to real property. If so, the provisions of TEC, Chapter 44, Subchapter B, will control in lieu of Subchapter B, Chapter 271, Texas Local Government Code.

Great Hearts will adopt Code (TEC), Chapter 44, Subchapter B, as the process for awarding a contract for the construction, repair, or renovation of a structure, road, highway, or other improvement or addition to real property.

#### Financial Accounting System

The financial accounting software must enable the proposed charter school to comply with the requirements discussed in the Special Supplement To Financial Accounting and Reporting, Nonprofit Charter School Chart Of Accounts. (An electronic copy of the supplement is located at <a href="http://www.tea.state.tx.us/index4.aspx?id=1222">http://www.tea.state.tx.us/index4.aspx?id=1222</a>.)

a) Identify and discuss the capabilities of the financial accounting software (i.e., the complete name of the software application and the software version) that the proposed charter school will use. Include information about the following aspects of the software: the ability to track asset, liability, net asset, revenue and expense data; the ability to record and maintain the budget, including amendments, approved by the governing body of the sponsoring entity; the Attachment P – Submit negotiated service agreements for Great Hearts Academies, Inc. and Fester & Chapman, and any other entities that will provide accounting, payroll, and/or tax accounting services. If a service agreement is negotiated with Great Hearts Academies, Inc., define the physical location for all financial records of the proposed charter school since this entity is not located in Texas.

## APPROVED DURING CONTINGENCY PROCESS

#### See Attachment P

The financial accounting, payroll, and tax accounting services for Great Hearts America – Texas will Initially be donated through Great Hearts Academies, Inc., a non-profit charter management organization serving 16 schools in Arizona at no charge. All financial records for the proposed school will be stored in San Antonio, Texas. No terms have been negotiated to date between Great Hearts America – Texas and Great Hearts Academies, Inc., since it is expected that Great Hearts America – Texas will be performing the day to day financial accounting, payroll, and tax accounting if the charter is approved. However if a negotiated service agreement is entered into, we would expect that the terms will be relatively consistent with past practices of Great Hearts Academies, Inc. whereby the charter school will pay for professional services associated with the launch and start-up of the school, facilities maintenance and back office administrative services (e.g. accounting, payroll, etc.) as a percentage of the school's state aid received (typically between 7.5 and 10%)

Great Hearts America – Texas has recently engaged Padgett, Stratemann & Co., L.L.P., a qualified independent tax and accounting firm to perform its audit for the Initial year of operations (2012-13) after considering multiple firms through a competitive bid process. Great Hearts America – Texas may also decide to engage a qualified firm to assist in the preparation of IRS Form 990 tax filings in the future.

#### ATTACHMENT P - GREAT HEARTS ACADEMIES - SAN ANTONIO

February 19, 2012

Ward Huseth Great Hearts America Texas c/o Great Hearts Academies, Inc. 3102 N. 56<sup>th</sup> Street Suite 300 Phoenix, AZ 85018 APPROVED DURING CONTINGENCY PROCESS

To Whom It May Concern:

To date, Great Hearts Academies has not entered into any agreements or understandings with financial or accounting service vendors.

Most of the financial accounting, payroll, and tax accounting services for Great Hearts America—Texas will initially be provided through Great Hearts Academies, Inc., a non-profit charter management organization serving twelve schools in Arizona. No terms haves been negotlated to date between Great Hearts America – Texas and Great Hearts Academies, Inc. However if a negotlated service agreement is entered into, we would expect that the terms will be relatively consistent with past practices of Great Hearts Academies, Inc. whereby the charter school will pay for professional services associated with back office administrative services (e.g. accounting, payroli, etc.) as a percentage of the schools state aid received.

Additionally, Great Hearts Academies, Inc. has historically engaged Fester & Chapman, P.C. (Phoenix, AZ) to perform independent audits and assist in the preparation of IRS Form 990 filings. We would anticipate engaging Fester & Chapman for Great Hearts Academies—Texas or a similarly qualified tax and accounting firm through a competitive bid process.

Sincerely,

Ward Huseth Chief Financial Officer Great Hearts America - Texas



ability to record and maintain information regarding outstanding liabilities; and the ability to submit financial accounting data to be included in the Public Education Information Management System (PEIMS). If the applicant is aware that data will need to be exported to another software application (e.g., Lotus, MS Excel, MS Access) to be prepared for PEIMS submission, discuss the process that will be used to export the data.

Great Hearts Academy and Great Hearts America—Texas will employ industry leading nonprofit accounting software that is more than just a mechanism for capturing transactions and preparing standard financial reports. Our financial software (Blackbaud's Financial Edge *version 7.82*) allows us to adopt a business-oriented approach toward managing organizational finances, increasing our efficiency and giving us the tools we need to succeed in today's challenging education funding climate.

The Financial Edge software is designed to:

- Maintain the highest level of accountability
- Save time and money by streamlining our daily operations and administrative tasks
- Provide the intelligence we need to make strategic decisions to drive organizational growth

The Financial Edge gives an entire record to view financial activity, budgets, grant reimbursements, supporting documents, and a history of changes. The Financial Edge also transforms traditional accounting data into decision-making power by utilizing online dashboards for budget managers. It helps our professionals make smart strategic decisions, achieve the highest level of fiscal transparency and accountability, and evaluate the performance of every initiative or department in real-time with a click of the mouse. The Financial Edge has the ability to submit financial accounting data to be included in the Public Education Information Management System (PEIMS) and export data to several other software applications.

#### Student Attendance Accounting

The student attendance accounting software must enable the proposed charter school to comply with the requirements discussed in the Student Attendance Accounting Handbook. For further information, refer to http://www.tea.state.tx.us/index2.aspx?id=7739&menu\_id=645&menu\_id2=789.

niip.//www.iea.state.tx.us/index2.aspx?iu=1159&menu\_iu=045&menu\_iuz=169.

a) Identify the student attendance accounting software (i.e., the complete name of the software application and the software version) that the proposed charter school will use, and discuss the software's ability to produce the required reports and track student-related data required in PEIMS.

Great Hearts Academies is registered with Tyler Technologies Schoolmaster District Edition (Version 1.80a) that pulls enrollment, average daily attendance, and average daily membership reports. This software is fully compliant with the related data requirements for PEIMS.

#### Facility Management

 Provide the physical address of the facility to be used by the proposed charter school and describe the facility.

N/A, the facility has not been secured.

b) Describe how the facility is currently used or how it was used in the past.

N/A, the facility has not been secured.

c) Explain why the site will be a suitable facility for the proposed charter school.

The facility has not been secured.

 d) Discuss plans to ensure that school facilities are accessible to disabled persons.

The facility has not been secured. Great Hearts America—Texas will make the facility accessible to disabled person to comply Federal ADA requirements.

e) Discuss the necessity of renovating and/or repairing the facility to ensure compliance with applicable building and/or occupancy codes and to make the facility ready for school operations. Identify the dollar amounts of any renovations and repairs.

Upon selection of a facility, Great Hearts America—Texas will renovate the facility in San Antonio to ensure compliance with applicable building and/or occupancy codes and to make the facility ready for school operations.

f) Submit as Attachment Q the certificate of occupancy or equivalent certificate showing that the facility is appropriate for school use that has been issued by the appropriate governing entity (i.e. local, county, or state authority having jurisdiction for the facility.) If a certificate of occupancy is not yet available, so state and provide an assurance that a certificate of occupancy will be obtained and submitted to TEA before serving students. A statement of not applicable will result in this item being considered incomplete and the removal of the application from the process.

Attachment Q contains a statement of assurance that a certificate of occupancy will be obtained and submitted to TEA before serving students.

g) Discuss any progress, partnership developments or future steps towards the acquisition of a facility and/or land.

Great Hearts America—Texas is in the process of securing the services of a commercial realty company to begin prospecting for the proposed facility and land needed to established the new school. Upon notification of receiving the charter, Great Hearts will work with the commercial realty company to secure an adequate facility.

h) Submit, as Attachment R, a copy of the negotiated lease agreement(s), deed(s) to property, earnest money contract, or purchase agreement(s), as applicable. If none of these documents are available on the date that the application is submitted, include a letter of agreement or understanding outlining the terms negotiated to date or a statement that no lease, deed to property, or purchase agreement has been negotiated. Any agreements or statements submitted must be signed by all parties involved in the transaction. If a location has not been identified, a statement noting this should be included. A statement of not applicable will result in this item being considered incomplete and the removal of the application from the process.

Attachment R contains a statement indicating that the location has not been identified and that no lease, deed to property, or purchase agreement has been negotiated.

 Identify the individuals who negotiated the lease or purchase of the facility on behalf of the lessor or seller and the sponsoring entity. Note any relationships or business affiliations between the individuals identified above.

Great Hearts is in the process of securing the services of a commercial realty company to begin prospecting for the proposed facility and land needed to established the new school. There are no known relationships or business affiliations.

j) Identify all other organizations or individuals that will be using the facility in addition to the proposed charter school.

No other organization will be utilizing the facility.

#### Transportation and Food Service

GreatHearts

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a) Describe provisions for transportation for students served by the charter school. Pursuant to federal law, the school must provide transportation to students eligible for special education and related services as required by their Individualized Education Program (IEP).

Great Hearts America—Texas will transportation for students eligible for special education and related services will be made available if approved by the ARD committee and required by a student's Individualized Education Program (IEP).

b) Describe provisions for food service, if any, for students served by the charter school, including plans for free or reduced lunch and breakfast programs. If 10% of the students qualify for free or reduced breakfast, the school is Business Plan (p. 64) – Describe provisions for the transportation of students in the identified population.

Great Hearts America – Texas will not provide bus transportation to/from school for most students. Transportation for students eligible for special education and related services will be made available if approved by the ARD committee and required by a student's Individualized Education Program (IEP). Great Hearts America – Texas may provide full fare tokens or discounted student passes for the city buses. Subsidized bus fare would also be available by request. The costs associated with transportation are not expected to be significant.

APPROVED DURING CONTINGENCY PROCESS

required by Texas Education Code §33.901 to provide a breakfast program for those students. For additional information, refer to <u>http://www.squaremeals.org</u>.

Great Hearts America—Texas will provide food service for students served for students served by the charter school, including plans for free or reduced lunch and breakfast programs. In addition, a free or reduced breakfast will also be available. The contract for outside food services will be bid out pursuant to Texas Public Law.



## ATTACHMENT A GREAT HEARTS AMERICA – TEXAS

PUBLISHED NOTICE OF PUBLIC HEARING





ADOPT-A-FRIEND Humane Society of SanAntonio 4804 FredericksburgRd

Z.

Mon-Sun 12-7pm 210-226-7461, sahumane.org HAVANESE AKC EASTER PUPSI \$450-up. Taking Deposits! Joan 830-579-4414 joanroane@all.net OLDE English Buildogs in College

Station, TX Shots, wormed & tales docked: \$1,200, 979-220-4405. Tickets & Events

CHAVEZ VS. RUBIO 2/4/2012 @ Alamodome - Ringsida Hoor 1st S Rows and more. 817-177-7779 210-627-3024 THEATRE+ Spurs + Concert + Rodeo+Chavez vs Rubio + Bury-Sell alamotickets.com + 344-6262 +

Appliances

#### V IT OUT

APPLIANCE Lig. Outlet Buy/Sell Repair/Wrnty, Sr/Mil Disc or 10%w/ad 500 Carolina, 513-5050 APPLIANCE Repair, Irig, washer, dryer sty, free svc call w/repair-924-0594

Firewood S115 AGED 1/2 CORD DELIVERED, WOODY S 313-0495

#### Guns

SAXET GUN SHOW Sat Feb 4 9am-5pm San Feb 5 9am-5pm San Feb 5 9am-5pm Ist Weekend of Every Monthil San Antonio Evern Ctr 8111 Mesdow Lesi Loog 410 & Marbach Rd For Info Call 361-289-2256 Inthe

Heavy Machinery & Tools

NEW Holland Tracktor, 75 HR 560 hrs, Excel Cond., \$12,500, 210-209-4883

Medical Power Chair (New, Never Used) \$695. Hospital Bod, Low Loss Air Mattress 4 Whi Walker, Wheelchair (Reg & XLG) Ony, Concentrator, Fingertio Pulse Oz, Wheelchair for Shower, Crap, BI-Pap Patient LIft,Rolling Shorr Che 349-3009

Musical Instruments WE BUY Used Planos, We Rep. Used Planos 210-224-1701

Portable Bioldings STORAGE: 8x10 \$945; 8x12 \$1175,all wood, built on site. Others. 748-3814

Estate Sales 613 S. FLORES, LIQUIDATION SALES

See Pics, teddybearthriffystore.com ATV'S

I Buy RV's, ATV's dirt and street biles + 210-287-1520 RV Travel Trailers/Fifth Wheels

FUNMOTORS buys, sells, repairs and rents RVs. 210 520 9500 A/C-Heal Repair

## LOOK ())

AC Install & Srvc TEJAS AC-Free cst.on installs:639-3966 TACL021813E Appliance/Small Engine Repair

LOOK () WASHER & Dryer In-home Srvc. 1-yr warc, FREE svc.cell w/reper 227 1006 APPLIANCE repair, trig, waster, dryer, sty, free svc call w/repair 924-0594

Bathewitchen REMODELING, Roofs, patios, decks, cabinets, paint & flooring 210-710-4372

Carpentry FENCES/siding/additions/paint/decks /patio covers, repairs/20yrs.251-0975

**Carpet Service** PROF. Carpet Cleaning Any 3 Rms, 359 Vo 7 days/ 40 + yrs exper 436-8652

Carport/Patio Cover

CARPORTS, Patio cvrs, metal, wood Concrete free est. 868. Date 695-2233 Concrete Work

**Great**Hearts

J&L Drwys, Patics, Remodeling, Col-oring&Stamping.FREE Est210-781-2138 SOLIS Concrete, sidewalks, driveways, etc. Bobcat srvcs, Lic. 210-815-2432

**Electrical Services** 

DEMOLITION, Land Clear, Bobcat gravel- driveways Free est; 867-0242

Fences/Fencing FENCING, Wood & wrought fron: decks, replace & install, Free Est, 872-5138 BEST Prices Wood, cluinlink, onu-mental, alum. Free ests. 210-577-0705

Flooring WOOD, laminate & tile install \$1st/up sand & relinish,free est. David 390-2184

Handyman Services GENERAL Handyman. Siding, fancing fascia, decks, concrete work. 391-1291 SHEETROCK Repairs, Cracks, Tape & Floar, 1 FIX ANYTHING, 902-0400 John Haulung

TRASH, Demo, Janitorial, evictions, Moving Srvc, etc. Res/Comm. 548-0375 TRASH PICKUP, brush, junk, commer-cial, anything, 210-859-1618. GARAGE, Home, commercial, office, estate, scrap, batteries 210-382-4060 WE CLEAN & Improve Properties Demolition; Lic. & bonded. 303-7769

Home Improvement/Contracting

APTRAD WE DO All types Remodeling, Roofing & Fencing, Free estimates.512-799-5698 ALL TYPES OF CONSTRUCTION ared, 210-355-1322 City Lie

redcoatremodeling.com Room addins, kit./bath, paint, tile, etc. 210-860-3335 GARCIA Remod., latchen, beth, doors, paint, shtrch, tile, repairs 210-383-1848

House Leveling V IT OUT

LEVEL Your Home-This is the Right -Finance, cash. Lic. & Jns. 863-4304 Massage Therapy

LOOK 00

MASSAGE 4-U \$35/24hr Pain/stress; CC OK, #20729 Daris 336-2076 bodymassage.4T.com ExperEuphoria \$30 \* 590-8151 V.Catherine #020870

Movers LOOK 00

PEREZ Moving-Res./Bus. Loc./State, lic/ins.TxDot 0005694958 # 923-6357 Painting

LOPEZ Paint, int/ext, crontry, shtrock, Ixture, 7days, free est 05 dn 325 5814

Plumbing & Septic RAPID Response Pibg. Need A Little 'R&R' from Hi prices, 204-9972 M38679

ZEPEDA PLUMBING REPAIRS Sewer&Drain + 349-4054#M6239 SEMI-Rel. Plumb. res/comm permits, gas, sewers, free est. #M15460 421-7667 LOW Cost All Plumbing repair, gas, wtr,sewer. Irea est. 433-1205 #M36935

Roofing/Siding/Gutters

LOOK ()() HG Rooting, Leaks, repair, Commercial & Residential, Low rates, warranty, Free est, 27 yrs. exp. Lic. 210-396-0922. ull Call ME

LOOK B&W ROOFING & REPAIRS Free Estimate, 30yrs Exp. Ltd., 849-8025 ABTRABTS

JOSE R. ROOFING-Shingles & Leak Repairs, Free Est. 210-386-8220

**Business Personals** ASIA Magic Touch, Stress Relief.Broad way/410 Airport area, 210-373-6841 JULIA In/Outcalls; Airport area, 281/ Bitters, Daily Specials • 210-777-9203

#### Dating Services/Clubs LOOK CO

MEET FUN SINGLES Listen to Ads FREE! 210-375-1800 Use Code 7803 Curious7 375-1155, 18 +

REAL Discreet, Local connection Try FREET Call 210-447-1234 or 800-210-1010 invelinits.com

WHERE Hot Men Hook Up1 Try FREEJ Call 210-447-1108

The SAN ANTONIO HOUSING AUTHORITY and its Affiliates request proposals for:

and its Annuess request proposals (of Various Construction Municanarus B, Ra-Serverza, Proposals will be recoived and publicly operad at that tares at the offices of the SAMA Procurement Depart-ment, B18 S, Rores, San Antonio, recas 18204, A pre-submittai meeting will be held on February 9, 2012 at 10500 a.m. (CST) at the SAMA Castral Office, B18 S. Hores, San Antonio, Texas 78204

This is a Section 3 covered contract. As a result, contractors will be required to provide economic, educational and/or training opportunities to very low and low income individuals.

Specifications packages are available online at http://www.raha.org, or at http://www.nahro.ecomonicengme.com, or at SAHA's Difice of Procurement, located at 818 5. Flores, San Antonio, Texas 78204 or by calking (210) 477-6059.

San Antonio Housing Authority By: Lourdes Castro Rammer President and CEO

REDUEST FOR COMPETITIVE SEALED PROPOSALS detain County Emergency Services District 35 Fire Rescue, A fersa non-profit (Fire 8 Rescue) is requesting competitive sealed proposals (or the construction of a new ine-station in Somerser, Fersa, Bid packages in the melline at the offer of the proposals for the construction of a new fire statuon in Somerset, Teasa, Bid packages will be evaluable at the officer of the Architect. UK Travis, 3211 Recondorbes Rd. 5-106, San Antonio, Terza & 210-32: 2522 at 9:00 AB Verbaneschar February B, 2012. The Fire & Rescue shall builts hidde stated upon the criteria in the packat. The Fire & Rescue is not responsible or any metale or fahare on the part of the offeror. The Fire & Rescue rescress the offeror for any fresh and reject all proposals. Fire & Rescue shall not eximute the offeror. The Fire & Rescue resmouts the offeror for any fresh cost incurred by the offeror. REQUEST FOR PROPOSALS

SEALED PROPOSALS will be received by Education Service Center, Region 20 for

Voluntary Insurance RFP #1203

Proposals are due 2:00 p.m., February 20, 2012 al Region 20, Conference Center Business Office, 1314 Hines Averae, San Antonio, TX 78208, at which time proposals will be publicly opened.

Contact Kristin Roberson w/FBS at 800-583-6908 with any questions regarding RFP.

REQUEST FOR PROPOSALS

SEALED PROPOSALS will be received by Education Service Center, Region 20 for:

Catering #11068

Proposals are due 2:00 p.m., February 23, 2012 al Region 20, Conference Center Business Office, 1314 Hines Avenue, San Antonio, TX 78208 al which time proposals will be publicly opened.

Contact Jam Metzger at 210-370-5204 with any questions regarding RFP SAISD WILL ACCEPT SEALED BIDS/PROPOSALS:

RFP #12-001, Landfill Disposal Services, dua by 10:00 am, Mon. 02-20-12, at 1215 Austin SL, SA, TX 78208.

Solicitations evallable at www.texash tem.com. For information call Andrea Morates, (210) 224-2781, ext: 119.

Legals/Public Notices PUBLIC NOTICE

POBLIC HOTICE Banders Rd, Suite 204 San Artimo TX Banders Rd, Suite 204 San Artimo TX B25505 (2016) and 2016 San Artimo TX B25505 (2016) and 2016 San Artimo TX B2505 (2016) and 2016 San Artimo TX B2505 (2016) and 2016 San Artimo TX B1004 write to the Execution San Artimo Hercons withing to make comments should write to the Executive Director of the Commission, Council on Occupational Education, 7940 Roswell Road, Biog. 2000, Suite 325, Attanta, GA 30350, Persons making comments must provide their names and mailing addresses.

names and making addresses. GREAT HEARTS ACADEWIES, a leading charter, school management organization based in Airona, nocently amounced its plans to explore the possibility of opening a natwork of classical, idential and schart schools in San Antonio, Teras. An informational meeting will be held for prospective parents and other interested citzers. Monday, February 616, 510-710 pm Radius Center 106 Auditorium Circle, San Antonio, TX

#### EXHIBIT "A"

NOTICE OF INTENTION TO ISSUE CITY OF COTULLA, TEXAS CERTIFICATES OF OBLIGATION

CENTIFICATES OF DISIDIARITOR NOTICE IS HEREY GIVEN that the Board of Aldermen of the City of Cotults. Texas (the "City") will converse at its regular meeting place at the Council Chambers, City Hall Building, 117 Front Street, in Cotulta, Texas at 7,00 or dock pam, Cotulta, Texas time basage of an ordinance and curring such meeting, the Board will consider the basage of an ordinance and existing to puscify the Board will consider the basage of an ordinance and meetisting to automate the tissance of any er more series of participates of bablysion in an aggregate principal amount not to



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## ATTACHMENT B GREAT HEARTS AMERICA – TEXAS

SYNOPSIS OF PUBLIC HEARING





### Public Hearing-Community Open House Radius Center, 106 Auditorium Drive San Antonio, Texas February 6, 2012

The Great Hearts America Public Hearing-Community Open House drew a sizable crowd. Sixtyfive community members attended the meeting. Peter Bezanson, Chief Academic Officer, announced the organization's intent to open a charter school in San Antonio, Texas through the presentation of a nine minute video on the Great Heart's mission, curriculum and the portrayal of the Great Hearted student.

Following the video, he introduced the audience to the Great Hearts America Program using a PowerPoint presentation. A summary of the comments made by Peter Bezanson during the PowerPoint presentation follow:

<u>Introductory Comments:</u> Peter Bezanson discussed the following subtopics: (1) The History of Great Hearts Academies, (2) the impact of Great Hearts Academies on the Phoenix Educational Market, (3) the basics about what a charter school is and the Texas laws that govern them, (4) Great Hearts' San Antonio expansion plan.

<u>Mission</u>: Peter Bezanson discussed the following subtopics: (1) what it means to be a "classical school," (2) why Great Hearts offers a "core curriculum," (3) how Great Hearts works with and interacts with other local schools.

<u>Curriculum</u>: Peter Bezanson gave the audience a series of handouts that explained, in summary and in detail, the courses required at every grade level K-12. Peter Bezanson then discussed the curriculum at each of those grade levels.

<u>The Great Hearted Student</u>: Peter Bezanson discussed the fact that the Great Hearts Graduate is a leader, is prepared for a lifelong pursuit of Truth, Beauty, Goodness, and is committed to helping to make society more just, humane, and philosophical. He also summarized the academic achievement (state standardized scores, nationally normed percentiles, and college board data) for the existing Arizona schools.

Peter Bezanson entertained questions for approximately 30 minutes. The following questions were asked by the community attendees and a summary of his responses follows:

1. What are the geographic boundaries? The entire great San Antonio metropolitan area will be open for application. Great Hearts plans to open schools throughout the San Antonio area over the next 5 years.



- When looking for applicants, is the application procedure readily available on line? The application for the school is available online, but it may also be completed on paper or over the phone. The application asks for only basic information and Great Hearts, as a public charter school, has no admissions criteria.
- 3. Are there positions that you will look to hire? Yes, we will look to the community for teachers and other staff. Great Hearts imagines that it will hire 50% of teachers from within San Antonio and recruit 50% from out of state.

4. Is transportation provided? We do not. Bussing is simply too expensive and many charter schools do not offer it.

- 5. What are the hours that students are in class? Almost all of our schools are 8:30 to 3:00pm.
- 6. Are there any requirements for parental involvement? We want parents to be involved, but we cannot and do not force them to. We invite parents to visit the school frequently, have many opportunities for volunteerism, and also invite them to apply to serve on the board of the school or the Parent Board.
- 7. Are there extracurricular activities? What are the hours? The after school time extends the day until 6:00pm. Our after school program is call "Athenaeum" and it is an extension of the academic culture of our schools. There are fun and games, instruction, and homework time.
- 8. You work the kids really hard. Do you see signs of stress? Go to the Great Hearts Website...our data is very public. You can look at parent satisfaction surveys to see what our parents think about our schools. If you do look, you will see that the following data points really jump out at you. Something like 90% of the families believes that the school is academically rigorous, but an equal percent believe that the homework is not burdensome. A large number of students—a ridiculous number like 80%—say that they love our schools. In a survey of 8<sup>th</sup> grade students, 70% of the students report that they enjoy coming to school. Why? The work is meaningful, and we give them outlets for fun and joy during and after school. We call it the "joy factor". You are right, we have counselors that make sure that the kids are "o.k." and own their learning.
- 9. Do you serve students with learning challenges or learning difference? Great Hearts willingly and excitedly accepts all students. We make accommodations or modifications as necessary to serve students with special needs and we are proud of our track record in Arizona with such students.
- 10. Do you measure your dropout rate? Graduation rate? Yes. According to the way Arizona measures it, we have a 0% dropout rate. According to the way we measure it



#### APPROVED DURING CONTINGENCY PROCESS

Vision of the School (p. 7) – Confirm your understanding that, in accordance with 19 Texas Administrative Code (TAC), § 100.1151, a criminal history background check must be conducted on any individual that volunteers to work with students in any capacity.

Great Hearts understands that, in accordance with 19 Texas Administrative Code (TAC) §100.1151, a criminal history background check must be conducted on any individual that volunteers to work with students in any capacity.

# Community Support (p. 7) – Address question 3a by providing a description of the community and why It was chosen.

Great Hearts is currently evaluating several locations for potential campuses on the north side of San Antonio. The primary criteria used to determine the best location of the first school consist of high levels of community response demanding a comprehensive, classical liberal arts public school and broad access to a range of communities. We are thus exploring available sites north of the 410 loop and along the I-10, 281, and I-35 corridors.

Community Support (p. 7) – Confirm your understanding that, under federal law, transportation must be provided to students with special needs as identified in the students Individualized Education Program (IEP).

Great Hearts understands that, under federal law, transportation must be provided to students with special needs as identified in the students' individualized Education Plans (IEP).

(and we publish this data publically), we have about a 95% retention rate for students each year. This is not a "drop out rate," but it tells you that the vast majority of our kids stick with us.

11. Is there sibling preference in the lottery so that families are kept together? Yes. Arizona law allows for sibling preference as does, I believe, Texas law.



Parent Night Registration Great Hearts Academies February 6, 2012

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Name	Email address
GreatHearts	

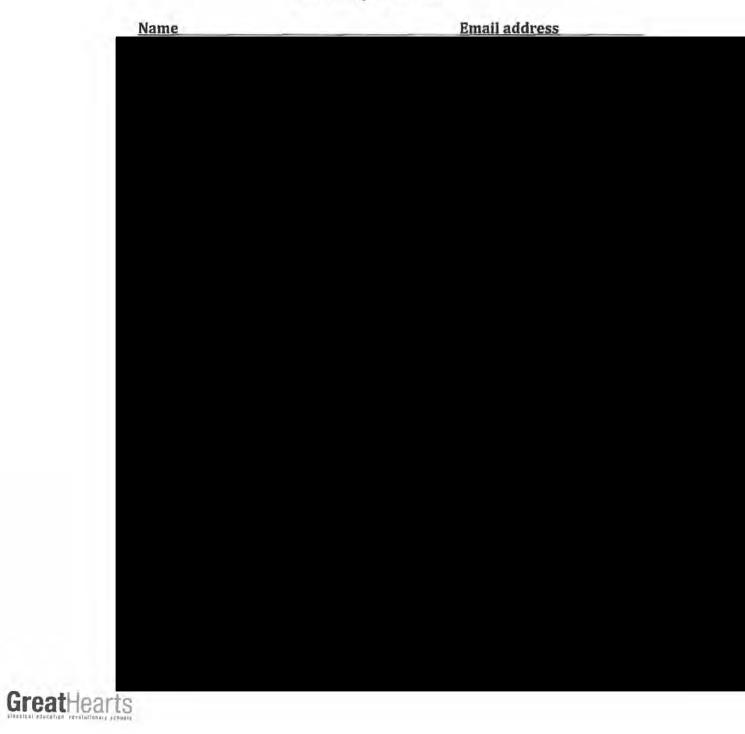
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Name **Email address** 76 GreatHearts

# **Question/Comment Registration**

(Please limit questions and/or comments to 3 minutes)

Great Hearts Academies February 6, 2012

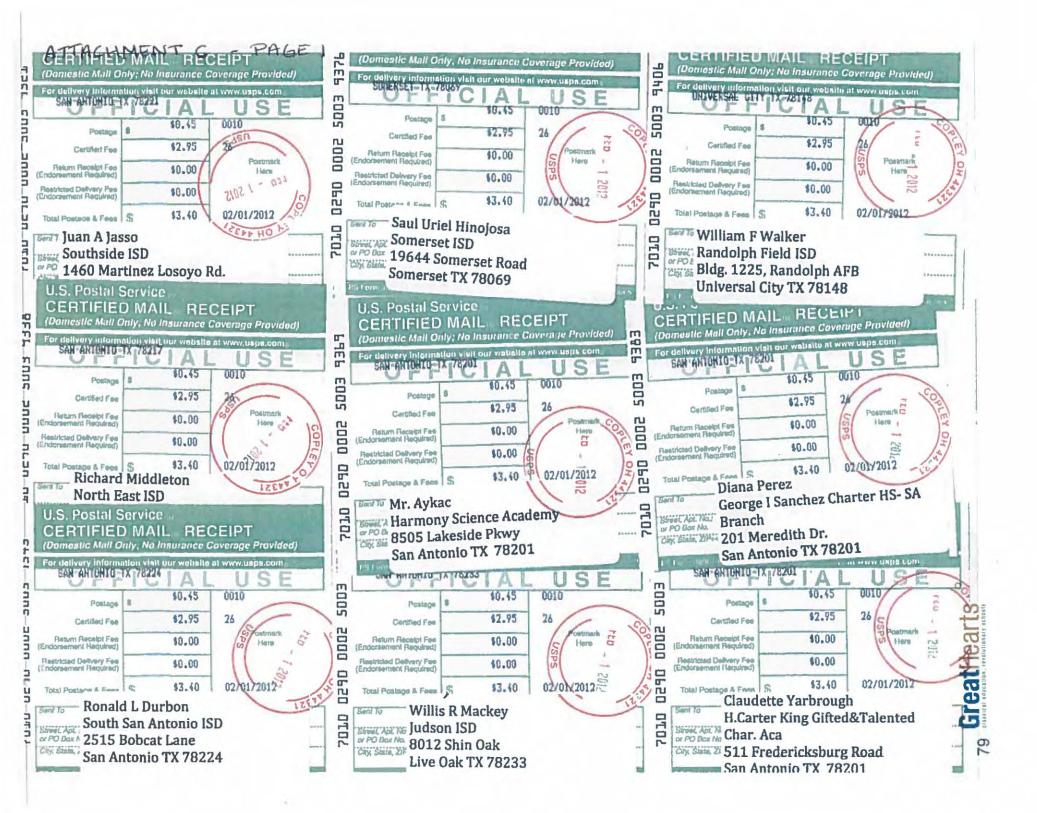


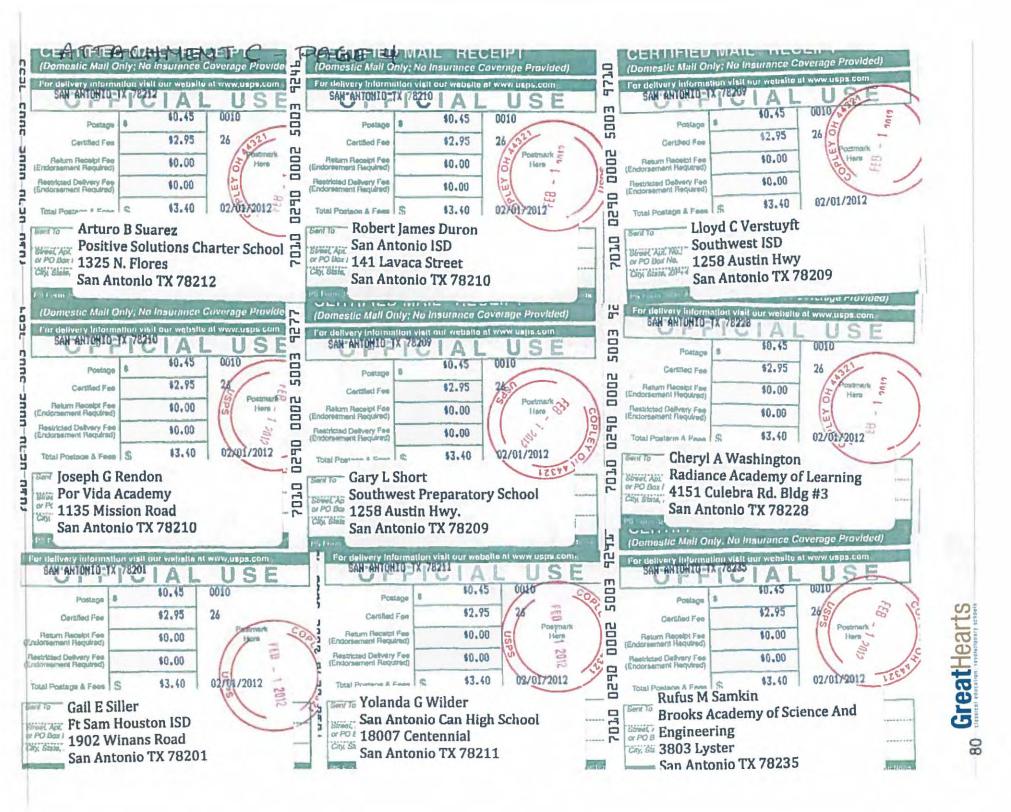
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# ATTACHMENT C GREAT HEARTS AMERICA -- TEXAS

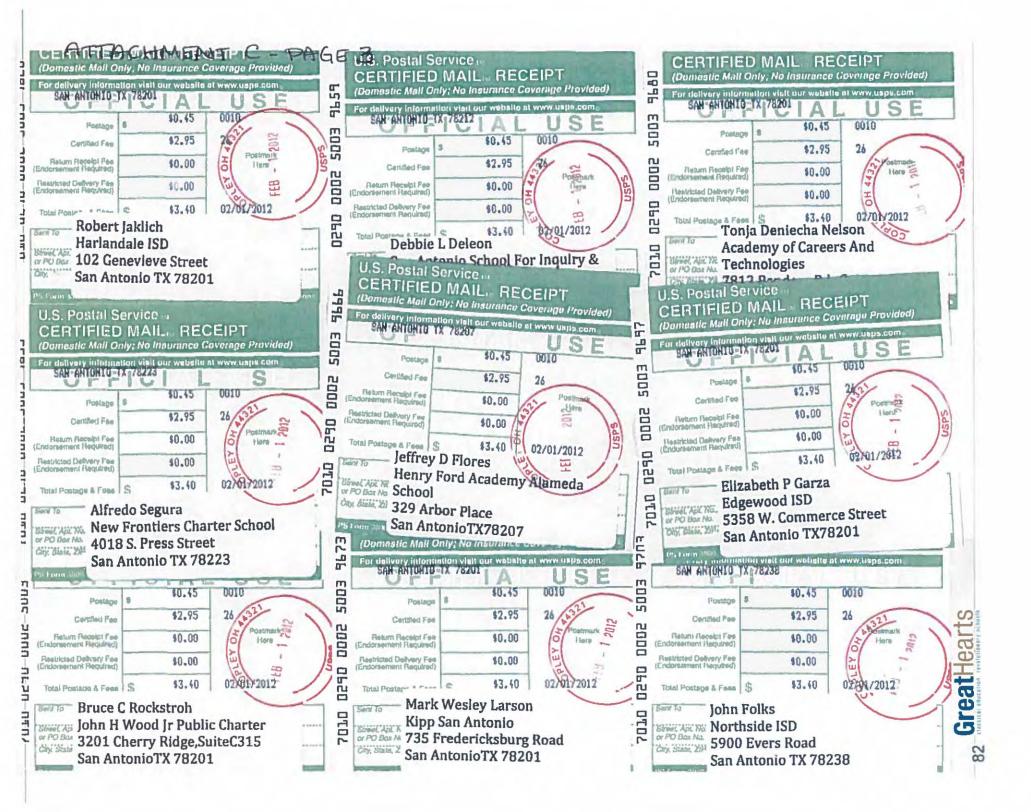
CERTIFIED MAIL RECEIPT CARDS











# ATTACHMENT D GREAT HEARTS AMERICA – TEXAS

NOTARIZED BIOGRAPHICAL AFFADAVITS



# Seventeenth Generation Open-Enrollment Charter Applicant Biographical Affidavit (MUST BE TYPED and NOTARIZED)

<ul> <li>Member of the governing body of the charter school</li> <li>School officer:</li> <li>Full Name of Sponsoring Entity <u>Great Hearts America Tex</u></li> <li>Full Name of Proposed Charter School <u>Great Hearts Academ</u></li> <li>In connection with the above-named organization and charter scinformation about myself as hereinafter set forth. (Attach addem any questions fully.)</li> <li>IF ANSWER IS "NO" OR "NONE", SO STATE.</li> <li>I. Full Name (Initials Not Acceptable) <u>Peter David Bezanse</u></li> <li>I. Full Name (Initials Not Acceptable) <u>Peter David Bezanse</u></li> <li>If yes, give reason for the change: <u>Maiden name (if female)</u>:</li> <li>Other names used at any time: <u></u></li> </ul>	hool application, I herewith make representations and suppl dum or separate sheet if space hereon is insufficient to answ
<ul> <li>Full Name of Sponsoring Entity <u>Great Hearts America Tex</u></li> <li>Full Name of Proposed Charter School <u>Great Hearts Academ</u></li> <li>In connection with the above-named organization and charter so information about myself as hereinafter set forth. (Attach addem any questions fully.)</li> <li>IF ANSWER IS "NO" OR "NONE", SO STATE.</li> <li>1. Full Name (Initials Not Acceptable) <u>Peter David Bezanse</u></li> <li>2. Have you ever had your name changed or used another name If yes, give reason for the change: <u>Maiden name (if female):</u></li> </ul>	iesSan Antonio hool application, I herewith make representations and suppl dum or separate sheet if space hereon is insufficient to answ
Full Name of Proposed Charter School <u>Great Hearts Academ</u> In connection with the above-named organization and charter set information about myself as hereinafter set forth. (Attach adden any questions fully.) IF ANSWER IS "NO" OR "NONE", SO STATE. 1. Full Name (Initials Not Acceptable) <u>Peter David Bezanse</u> 2. Have you ever had your name changed or used another name If yes, give reason for the change: <u>Maiden name (if female):</u>	tiesSan Antonio hool application, I herewith make representations and suppl dum or separate sheet if space hereon is insufficient to answ m ?  Yes X No
In connection with the above-named organization and charter set information about myself as hereinafter set forth. (Attach adden any questions fully.) IF ANSWER IS "NO" OR "NONE", SO STATE. 1. Full Name (Initials Not Acceptable) Peter David Bezanse 2. Have you ever had your name changed or used another name If yes, give reason for the change: Maiden name (if female):	hool application, I herewith make representations and suppl dum or separate sheet if space hereon is insufficient to answ n ?
information about myself as hereinafter set forth. (Attach adder any questions fully.) IF ANSWER IS "NO" OR "NONE", SO STATE. 1. Full Name (Initials Not Acceptable) <u>Peter David Bezanse</u> 2. Have you ever had your name changed or used another name If yes, give reason for the change: <u>Maiden name (if female):</u>	dum or separate sheet if space hereon is insufficient to answ
Full Name (Initials Not Acceptable) Peter David Bezanse     Peter David Bezanse     Have you ever had your name changed or used another name     If yes, give reason for the change:     Maiden name (if female):	? 🗌 Yes 🖾 No
<ol> <li>Have you ever had your name changed or used another name If yes, give reason for the change:</li></ol>	? 🗌 Yes 🖾 No
If yes, give reason for the change:	
Maiden name (if female):	
3. Current home address: 9425 N Arroya Vista Dr W, Phoeni.	, AZ 85028
If you are a member of the governing body of the sponsoring do you reside within 50 miles of the geographic boundary of	entity and the sponsoring entity is an out-of-state organizat
Yes X No N/A (because I am not a membe sponsoring entity is based	of the governing body of the sponsoring entity or the n Texas).
4. Current home telephone number: 480-330-9727	
5. Education: Dates, Names, Locations and Degrees	
College: 1990 - 1994, St. John's College, Annapolis MD	and Santa Fe NM, B.A. in Liberal Artss
Graduate Studies: 1995-2005. University of Iowa, Iowa (	ity, IA, M.A. and Ph.D. in Philosophy
Others:	
6. List membership(s) in professional societies and association	

7. List complete employment record, including self-employment (up to and including present jobs, positions, directorates or officerships) for the past 10 years including dates, employers, addresses and positions held:

1998-present -- Mesa Community College, 1833 West Southern Avenue Mesa, AZ 85202, Adjunct Professor 2005-present -- Great Hearts Academies, 3102 N 5th Street, Phoenix, AZ 85018, Chief Academic Officer 1998-2005 -- Tempe Preparatory Academy, 1251 East Southern Avenue Tempe, AZ 85282, Teacher

8. List all businesses or organizations of which you are a partner or in which you have a majority interest: n/n

9. List all previous experience with charter schools. Include open-enrollment schools and/or campus or program charters including dates, charter schools/charter holders, addresses and positions held:

Currently serve as Vice President for Arizona State Board for Charter Schools

Currently serve as Director for: Archway Classical Academy--Veritas, Archway Classical Academy--Chandler, Archway Classical Academy--Scottsdale, Anthem Preparatory Academy, and Teleos Preparatory Academy

Previously served as Director for: Chandler Preparatory Academy, Scottsdale Preparatory Academy, Candeo School

10. List all previous experience with any charter school management company including dates, management company, address and position held:

2005-present, Great Hearts Academies, 3102 N 56th St, Phoenix, AZ 85018, Chief Academic Officer

11. List any professional, occupational, or vocational licenses issued by any public or governmental licensing agency or regulatory authority which you presently hold or have held in the past. State date license was issued, issuer of license, date terminated, reasons for termination:

State of Arizona Level One Fingerprint Clearance Card. Card Number 2A01269019, expires 01/12/2016



12. During the last 10 years, have you ever been refused a professional, occupational or vocational license by any public or governmental licensing agency or regulatory authority, or has such license held by you ever been suspended or revoked?

C Yes @ No

If yes, give details:

13. Will you be employed by or contract with the sponsoring entity, the charter school, or the managment company of the school?

C Yes C No If so, please state the compensation you expect to receive.

Also explain any other compensation you expect to receive for service on the governing body of the sponsoring entity.

14. Is any relative within the third degree of consanguinity (i.e., your parent, grandparent, great-granparent, child, grandchild, great-grandchild, sibling, aunt, uncle, niece, nephew) or within the third degree of affinity (i.e., your spouse or your spouse's parent, grandparent, great-granparent, child, grandchild, great-grandchild, sibling, aunt, uncle, niece, nephew) a member of the governing body of the sponsoring entity or of the governing body of the charter school?

C Yes @ No

If so, give details:

15. Will any relative(s) within the third degree of consanguinity or affinity (See definitions in Question 14 above.) be employed by or receive any compensation or remuneration from the sponsoring entity, charter school, or the management company of the charter school?

C Yes @ No

If so, give details:

16. Have you ever been convicted of a misdemeanor involving moral turpitude; a felony; an offense listed in TEC 37.007(a); or an offense listed in Article 62.01(5) Code of Criminal Procedure?

C Yes @ No

If so, give details:



17. Have you ever been adjudged bankrupt? C Yes 💿 No If so, please provide the following information.
Number of times adjudged bankrupt:
Date of each bankruptcy judgment:
Description of the circumstances surrounding each bankruptcy:
18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder o any business, which, while you occupied any such position or capacity with respect to it, became insolvent, declared bankruptcy, or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship?
C Yes  No
If so, give details:
Dated and signed this day of to Sin, 2012. I hereby certify under penalty of perjury that I am acting on my own behalf and that the foregoing statements are true and correct to the best of my knowledge and belief. (Signature of Affiant)
VERIFICATION
State of ARIZONA
County of Maricopa
On this day, <u>HETER PERSON</u> (name of affiant) appeared before me the undersigned notary public and deposed that he/she executed the above instrument and that the statements and answers contained therein are true and correct
o the best of his/her knowledge and belief.
Subscribed and sworn to before me this day of <u>TEBRUARY</u> , 2012.
(Notary Public)
KRISINDA GUTHRIE Notary Public - Arizona Maricopa County My Commission Expires December 25, 2015



# Seventeenth Generation Open-Enrollment Charter Applicant Biographical Affidavit (MUST BE TYPED and NOTARIZED)

Check all that apply:	
K Member of the governing body of the sponsoring entity	
X Member of the governing body of the charter school	
School officer:	(State position as defined in TEC, \$12.1012.
Full Name of Sponsoring Entity Great Hearts AmericaTexa	15
Full Name of Proposed Charter School Great Hearts Academ	niesSan Antonio
	school application, I herewith make representations and supply endum or separate sheet if space hereon is insufficient to answe
IF ANSWER IS "NO" OR "NONE", SO STATE.	
I. Full Name (Initials Not Acceptable) Daniel Paul Scoggi	n
2. Have you ever had your name changed or used another nan	ne? 🗌 Yes 🖾 No
If yes, give reason for the change:	
Maiden name (if female):	
Other names used at any time:	
3. Current home address: 3106 E. Lexington, Gilbert, Arizona	a, 85234
If you are a member of the governing body of the sponsori do you reside within 50 miles of the geographic boundary	ng entity and the sponsoring entity is an out-of-state organizati of the proposed charter school?
Yes X No N/A (because I am not a memb sponsoring entity is based	per of the governing body of the sponsoring entity or the d in Texas).
4. Current home telephone number: 480-756-9644	
5. Education: Dates, Names, Locations and Degrees	
College: 8/87-6/91, Santa Clara University, Santa Clara,	CA, B.A. English Literature
Graduate Studies: 8/91-5/98, Claremont Graduate Univer	rsity, Claremont, CA, M.A., Ph.D. English Literature
Others:	
6. List membership(s) in professional societies and associatio	ons:
N/A	

 List complete employment record, including self-employment (up to and including present jobs, positions, directorates or officerships) for the past 10 years including dates, employers, addresses and positions held;

1/2004 to Present: Great Hearts Academies, 3102 N. 56th Street, Phoenix. AZ, Position of founding Chief Executive Officer

8/98 to 12/2003: Tempe Preparatory Academy, 1251 E. Southern Ave, Tempe, AZ: Position of Headmaster and Teacher

 List all businesses or organizations of which you are a partner or in which you have a majority interest: N/A

9. List all previous experience with charter schools. Include open-enrollment schools and/or campus or program charters including dates, charter schools/charter holders, addresses and positions held:

I am the Charter Holder for 15 open-enrollment charters, all in Metro Phoenix: Veritas Prep (2002), Chandler Prep (2004), Mesa Prep (2006), Glendale Prep (2007), Scottsdale Prep (2007), Teleos Prep (2008), Archway Classical Chandler (2009), Anthem Prep (2009), Archway Classical Veritas (2010), Archway Classical Scottsdale (2010), Trivium Prep (2010), Archway Classical Trivium (2010), North Phoenix Prep (2011), Archway Classical North Phoenix (2011), and Maryvale Prep (2011)

10. List all previous experience with any charter school management company including dates, management company, address and position held:

Since January 2004 to present, I am the founding Chief Executive Officer of Great Hearts Academies, an Arizona not-for-profit Charter Management Organization, address: 3102 N. 56th Street, Phoenix, AZ.

11. List any professional, occupational, or vocational licenses issued by any public or governmental licensing agency or regulatory authority which you presently hold or have held in the past. State date license was issued, issuer of license, date terminated, reasons for termination:

I have an State of Arizona Department of Public Safety Level One Fingerprint Clearance Card, issued in 2004, and renewed on 1/04/2012, Card # IVP0295753



12. During the last 10 years, have you ever been refused a professional, occupational or vocational license by any public or governmental licensing agency or regulatory authority, or has such license held by you ever been suspended or revoked?

C Yes @ No

11	ves.	pive	detai	Is:

13. Will you be employed by or contract with the sponsoring entity, the charter school, or the managment company of the school?

C Yes @ No If so, please state the compensation you expect to receive.

Also explain any other compensation you expect to receive for service on the governing body of the sponsoring entity.

14. Is any relative within the third degree of consanguinity (i.e., your parent, grandparent, great-granparent, child, grandchild, great-grandchild, sibling, aunt, uncle, niece, nephew) or within the third degree of affinity (i.e., your spouse or your spouse's parent, grandparent, great-granparent, child, grandchild, great-grandchild, sibling, aunt, uncle, niece, nephew) a member of the governing body of the sponsoring entity or of the governing body of the charter school?

C Yes @ No

If so, give details:

15. Will any relative(s) within the third degree of consanguinity or affinity (See definitions in Question 14 above.) be employed by or receive any compensation or remuneration from the sponsoring entity, charter school, or the management company of the charter school?

C Yes @ No

If so, give details:

16. Have you ever been convicted of a misdemeanor involving moral turpitude; a felony; an offense listed in TEC 37.007(a); or an offense listed in Article 62.01(5) Code of Criminal Procedure?

C Yes @ No

If so, give details:



Number	of times adjudged bankrup	t:
Date of	each bankruptcy judgment:	
Descrip	tion of the circumstances su	irrounding each bankruptcy:
any busi bankrup	ness, which, while you occu tcy, or was placed under su	ctor, trustee, investment committee member, key employee, or controlling stock upied any such position or capacity with respect to it, became insolvent, declare pervision or in receivership, rehabilitation, liquidation or conservatorship?
C Yes If so, give		
11 SO. 21V	c details.	
Dated and sig I hereby certi- correct to the	see of the second second	belief.
correct to the		(Signature of Afriant)
correct to the		(Signature of Affiant) VERIFICATION
State of	REana	(Signature of Affiant)
correct to the	0-	(Signature of Affiant)
State of County of On this day,	Rizona NaRicopa Narial	(Signature of Affiant) VERIFICATION
State of County of On this day, and deposed to	Rizona NaRicopa Narial	(Signature of Afriant) VERIFICATION (name of affiant) appeared before me the undersigned notary we instrument and that the statements and answers contained therein are true and ef.
State of County of On this day, and deposed to the best of	Rizona Marcopa Daniel that he/she executed the abo	(Signature of Afriant) VERIFICATION (name of affiant) appeared before me the undersigned notary over instrument and that the statements and answers contained therein are true and
State of County of On this day, and deposed to the best of	Rizona Marcopa that he/she executed the abo his/her knowledge and belief	(Signature of Afriant) VERIFICATION (name of affiant) appeared before me the undersigned notary we instrument and that the statements and answers contained therein are true and ef.
State of County of On this day, and deposed to the best of	Rizona Marcopa that he/she executed the abo his/her knowledge and belief	(Signature of Afriant) VERIFICATION Were instrument and that the statements and answers contained therein are true and ef. May of TERRARY, 2012, May of TERRARY, 2012, May May May May May May May May May May

Page 4 of 4

SAS 536-12 RFA 701-11-108

### Seventeenth Generation Open-Enrollment Charter Applicant Biographical Affidavit (MUST BE TYPED and NOTARIZED)

	reming body of the sponsoring		
7	anning and y at the spectrum	entity	
Member of the go	verning body of the charter se	ool	
School officer:		(State position	as defined in TEC, §12.1012.)
ull Name of Sponsor	ing Entity Great Hearts Ame	ica—Texas	
ull Name of Propose	Charter School Great Hea	s Academies—San Antonio	
		d charter school application, I herewith ma tach addendum or separate sheet if space h	
ANSWER IS "NO	" OR "NONE", SO STAT		
. Full Name (Initials	Not Acceptable) Ward Ry	1 Huseth	
Have you ever had	your name changed or used a	other name? 🗌 Yes 🖾 No	
If yes, give reason	or the change:		
Maiden name (if fe	male):		
Other names used a	t any time:		
Current home addr	ss: 3501 E Camelback Rd.,	20, Phoenix, AZ 85018	
		sponsoring entity and the sponsoring entity oundary of the proposed charter school?	y is an out-of-state organizatio
Yes 🗙 N		t a member of the governing body of the s y is based in Texas).	ponsoring entity or the
Current home telep	none number: <u>303-478-5</u>	36	
Education: Dates,	Names, Locations and Degre	4	
College: Septem	oer 1991 - December 1995; l	iversity of Wisconsin - Whitewater; White	water, WI; BBA in Accountin
Graduate Studies:			
Others:			
List membership(s)	in professional societies and	esociations:	
tember of American	Institute of Certified Public A	countants	
	lorado Society of Certified P sconsin Institute of Certified		
Since Member of W	sconsin institute of Certified	uone Accountants	

 List complete employment record, including self-employment (up to and including present jobs, positions, directorates or officerships) for the past 10 years including dates, employers, addresses and positions held:

Jan. 2012 - Present: GREAT HEARTS ACADEMIES, Phoenix, AZ; Chief Financial Officer April 2009 - Dec. 2011: CHARTER SCHOOL GROWTH FUND, Broomfield, CO; CFO and Investment Partner July 2004 - Sept 2008: KNOWLEDGE LEARNING CORPORATION, Littleton, CO; Vice President of Finance / CFO – School Partnerships (2005-2008) and Corporate Director of Financial Planning & Analysis (2004-2005) Dec 2000 - June 2004: ECOLLEGE.COM, Denver, CO; Corporate Controller and Chief Accounting Officer (2001-2004) and Assistant Controller (2000-2001)

8. List all businesses or organizations of which you are a partner or in which you have a majority interest:

9. List all previous experience with charter schools. Include open-enrollment schools and/or campus or program charters including dates, charter schools/charter holders, addresses and positions held:

Jan. 2012 - Present: GREAT HEARTS ACADEMIES, Phoenix, AZ; Chief Financial Officer (Non-profit charter management organization for network of excelling public prep schools in Arizona.)

April 2009 - Dec. 2011: CHARTER SCHOOL GROWTH FUND, Broomfield, CO; CFO and Investment Partner (Philanthropic social investment firm investing over \$200 million in growth of high-performing charter school networks.)

10. List all previous experience with any charter school management company including dates, management company, address and position held:

Jan. 2012 - Present: GREAT HEARTS ACADEMIES, Phoenix, AZ; Chief Financial Officer (Non-profit charter management organization for network of excelling public prep schools in Arizona.)

April 2009 - Dec. 2011: CHARTER SCHOOL GROWTH FUND, Broomfield, CO; CFO and Investment Partner (Philanthropic social investment firm investing over \$200 million in growth of high-performing charter school networks.)

11. List any professional, occupational, or vocational licenses issued by any public or governmental licensing agency or regulatory authority which you presently hold or have held in the past. State date license was issued, issuer of license, date terminated, reasons for termination:

Certified Public Account license from the state of Colorado in July 1990, however license is inactive currently

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N/A

12. During the last 10 years, have you ever been refused a professional, occupational or vocational license by any public or governmental licensing agency or regulatory authority, or has such license held by you ever been suspended or revoked?

C Yes @ No

es, give details:			
		and the second second	

13. Will you be employed by or contract with the sponsoring entity, the charter school, or the managment company of the school?

C Yes 
No If so, please state the compensation you expect to receive.

Also explain any other compensation you expect to receive for service on the governing body of the sponsoring entity.

14. Is any relative within the third degree of consanguinity (i.e., your parent, grandparent, great-granparent, child, grandchild, great-grandchild, sibling, aunt, uncle, niece, nephew) or within the third degree of affinity (i.e., your spouse or your spouse's parent, grandparent, great-granparent, child, grandchild, great-grandchild, sibling, aunt, uncle, niece, nephew) a member of the governing body of the sponsoring entity or of the governing body of the charter school?

C Yes @ No

If so, give details:

15. Will any relative(s) within the third degree of consanguinity or affinity (See definitions in Question 14 above.) be employed by or receive any compensation or remuneration from the sponsoring entity, charter school, or the management company of the charter school?

C Yes @ No

If so, give details:

16. Have you ever been convicted of a misdemeanor involving moral turpitude; a felony; an offense listed in TEC 37.007(a); or an offense listed in Article 62.01(5) Code of Criminal Procedure?

C Yes @ No

If so, give details:



<ol> <li>Have you ever been adjudged bankrupt</li> <li>Number of times adjudged bankrupt:</li> </ol>	? C Yes O No If so, please provide the following information.
Date of each bankruptcy judgment:	
Description of the circumstances surrou	unding each bankruptcy:
any business, which, while you occupie	, trustee, investment committee member, key employee, or controlling stockholder ed any such position or capacity with respect to it, became insolvent, declared vision or in receivership, rehabilitation, liquidation or conservatorship?
any business, which, while you occupie	d any such position or capacity with respect to it, became insolvent, declared

Dated and signed this 15th day of February , 2012. I hereby certify under penalty of perjury that I am acting on my own behalf and that the foregoing statements are true and correct to the best of my knowledge and belief.

(Signature of Affiant)

VERIFICATION

ONA State of aRicopa County of

USE On this day, (name of affiant) appeared before me the undersigned notary public and deposed that he/she executed the above instrument and that the statements and answers contained therein are true and correct to the best of his/her knowledge and belief.

Subscribed and sworn to before me this

day 20 10 (Notary Public) SIS My commission expires

(SEAL)





# ATTACHMENT E GREAT HEARTS AMERICA – TEXAS

501 (C) (3) DETERMINATION LETTER FROM IRS



INTERNAL REVENUE SERVICE P. O. BOX 2508 CINCINNATI, OH 45201

Date: OCT 17 2003

THE SISTER CREEK CENTER FOR THE LIBERAL ARTS C/O RICHARD E GOLDSMITH MATTHEWS AND BRANSCOMB PLC 112 E PECAN STE 1100 SAN ANTONIO, TX 78205-0000 DEPARTMENT OF THE TREASURY

Employer Identification Number: 43-1973126 DLN: 17053168040013 Contact Person: ID# 31227 TERRY W BREWER Contact Telephone Number: (877) 829-5500 Accounting Period Ending: December 31 Foundation Status Classification: 509(a)(1) Advance Ruling Period Begins: June 12, 2002 Advance Ruling Period Ends: December 31, 2006 Addendum Applies: NO

Dear Applicant:

GreatHearts

Based on information you supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a) (1) or 509(a) (2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(d) and 4940.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and

Letter 1045 (DO/CG)

#### THE SISTER CREEK CENTER FOR THE

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contributors may continue to rely on the advance determination until we make a final determination of your foundation status.

If we publish a notice in the Internal Revenue Bulletin stating that we will no longer treat you as a publicly supported organization, grantors and contributors may not rely on this determination after the date we publish the notice. In addition, if you lose your status as a publicly supported organization, and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that we had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date he or she acquired such knowledge.

If you change your sources of support, your purposes, character, or method of operation, please let us know so we can consider the effect of the change on your exempt status and foundation status. If you amend your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, let us know all changes in your name or address.

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

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Internal Revenue Code. However, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Internal Revenue Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Donors may deduct contributions to you only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, gives guidelines regarding when taxpayers may deduct payments for admission to, or other participation in, fundraising activities for charity.

You are not required to file Form 990, Return of Organization Exempt From Income Tax, if your gross receipts each year are normally \$25,000 or less. If you receive a Form 990 package in the mail, 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. Because you will be treated as a public charity for return filing purposes during your entire advance ruling

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#### THE SISTER CREEK CENTER FOR THE

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period, you should file Form 990 for each year in your advance ruling period that you exceed the \$25,000 filing threshold even if your sources of support do not satisfy the public support test specified in the heading of this letter.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete. So, please be sure your return is complete before you file it.

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, we will assign a number to you and advise you of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

If we said in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help us resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Letter 1045 (DO/CG)

THE SISTER CREEK CENTER FOR THE

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

o C. Ser

Lois G. Lerner Director, Exempt Organizations Rulings and Agreements

Enclosure(s): Form 872-C

Letter 1045 (DO/CG)



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## COMPTROLLER OF PUBLIC ACCOUNTS

P.O. BOX 13528 AUSTIN, TX 78711-3528

November 12, 2003

Mr. Richard E. Goldsmith Matthews and Branscomb 112 East Pecan, Suite 1100 San Antonio, Texas 78205

Dear Mr. Goldsmith:

Effective June 12, 2002, The Sister Creek Center for the Liberal Arts is exempt from Texas franchise tax and sales and use tax as a 501(c)(3) organization. The exemption does not extend to hotel occupancy tax.

We have assigned Texas Taxpayer Identification Number 1-43-1973126-2 to the organization. Please reference this number in correspondence with us. The assignment of the taxpayer number does not mean the corporation is permitted to collect or remit Texas taxes. Exempt organizations must collect taxes on most of their sales. Please give our Tax Assistance section a call at 1-800-252-5555 if you need a sales tax permit.

The sales tax exemption extends to goods and services purchased for use by your organization. The exemption does not apply if the purchase is for the personal benefit of an individual or private party, or is not related to the organization's exempt purpose. For more information, please see our publication # 96-122, *Exempt Organizations – Sales and Purchases*.

The enclosed exemption certificate can be issued instead of paying tax when buying taxable items related to the exempt purpose of the organization. The exemption certificate does not need a taxpayer identification number to be valid, but you may provide your Texas Taxpayer Identification Number if the seller requests it. Make as many copies of the exemption certificate as you need.

Changes to the organization's registered agent and registered office address must be filed with the Texas Secretary of State. The changes can be made online at http://www.sos.state.tx.us/corp/sosda/index.shtml or you can download the forms and instructions from http://www.sos.state.tx.us/corp/nonprofit.shtml. You can also contact them at corpinfo@sos.state.tx.us or by calling (512) 463-5582. It is important to maintain current registered agent information, because this is how we will contact you if we have reason to believe that your organization no longer qualifies for exemption.

Our goal is to provide you with prompt, professional service. Please take a moment to complete the enclosed survey. If it is more convenient, you may complete the survey on-line at http://aixtcp.cpa.state.tx.us/surveys/tpsurv.

If you have any questions, write to us at exempt.orgs@cpa.state.tx.us, or call us toll-free at 1-800-531-5441, extension 5-0252. Also, our publications, exemption certificates and other helpful information are online at http://www.window.state.tx.us/taxinfo/exempt.

Sincerely

Peter Kevin Hudson Exempt Organizations Section

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## ATTACHMENT F GREAT HEARTS AMERICA – TEXAS

ARTICLES OF INCORPORATION AND ALL AMENDMENTS



### SISTER CREEK CENTER

1507 Spanish Oaks San Antonio, Texas 78213 210-525-0222 (tel. & fax) 210-323-3156 (cell) Email: jimjudson@mac.com

### FAX

DATE: February 18, 2012

TO: Bill Fisher Cox & Smith Total # pages: 10 Fax #: 210-226-8395

FROM: Jim Judson

RE: Sister Creek Center & Great Hearts Texas documents

Attached please find signed documents — Restated Certificate of Formation and Consent in Lieu of Meeting.

Juin Juchen

James M. Judson Executive Director



Form 414	This space reserved for office use.
(Revised 05/11)	
Submit in duplicate to:	
Secretary of State	
P.O. Box 13697	Restated Certificate of
Austin, TX 78711-3697 512 463-5555	Formation
FAX: 512/463-5709	With New Amendments
Filing Fee: Sec Instructions	
	Entity Information
The name of the filing entity is:	
The name of the filing entity is:	
The name of the filing entity is: THE SISTER CREEK CENTER FOR	
THE SISTER CREEK CENTER FOR	THE LIBERAL ARTS ly shown in the records of the secretary of state. If the amendment changes the name
THE SISTER CREEK CENTER FOR State the name of the entity as current of the entity, state the old name and in	THE LIBERAL ARTS ly shown in the records of the secretary of state. If the amendment changes the name of the new name.
THE SISTER CREEK CENTER FOR State the name of the entity as current of the entity, state the old name and in The filing entity is a: (Select the ap	THE LIBERAL ARTS ly shown in the records of the secretary of state. If the amendment changes the name of the new name.
THE SISTER CREEK CENTER FOR State the name of the entity as current	THE LIBERAL ARTS ly shown in the records of the secretary of state. If the amendment changes the name of the new name. propriate entity type below.)
THE SISTER CREEK CENTER FOR State the name of the entity as current of the entity, state the old name and n The filing entity is a: (Select the ap For-profit Corporation	THE LIBERAL ARTS  It shown in the records of the secretary of state. If the amendment changes the name at the new name.  propriate entity type below.1  Professional Corporation
THE SISTER CREEK CENTER FOR State the name of the entity as current of the entity, state the old name and no The filing entity is a: (Select the ap For-profit Corporation Nonprofit Corporation Cooperative Association	THE LIBERAL ARTS  Is shown in the records of the secretary of state. If the amendment changes the name of the new name.  propriate entity type below.1  Professional Corporation  Professional Limited Liability Company
THE SISTER CREEK CENTER FOR State the name of the entity as current of the entity, state the old name and in The filing entity is a: (Select the ap For-profit Corporation Nonprofit Corporation Cooperative Association Limited Liability Company	THE LIBERAL ARTS  It shown in the records of the secretary of state. If the amendment changes the name at the new name.  propriate entity type below.1  Professional Corporation  Professional Limited Liability Company Professional Association

#### Amendments to Certificate of Formation

This restated certificate of formation makes new amendments to the certificate of formation. Provided below is an identification by reference or description of each added, altered, or deleted provision.

#### **Identification of New Amendments**

(Indicate the changes that have been made by checking the appropriate hox or boxes.)

- X The entity name has been amended.
- IThe registered agent name or registered office address has changed.
- I'he purpose of the entity has been amended.
- The period of duration of the entity has been amended.
- A general partner has withdrawn or been admitted to the limited partnership.



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#### Identification of New Amendments (conumed)

(Indicate the changes that have been made by checking and completing the appropriate box or boxes.)

Other changes. The certificate of formation has been amended as follows:

Add Each of the following provisions is added to the certificate of formation. The identification or reference of each added provision is set forth below. The full text of each added provision is contained in the amended and restated certificate of formation attached hereto.

Article Twelve - Added to include a provision on Discrimination

Alter The following identified provisions of the certificate of formation are amended. The full text of each amended provision is contained in the amended and restated certificate of formation attached hereto.

Article One - Amended to change Name Article Four - Amended to reflect changes to the purpose of the Corporation Article Five - Amended to add a Member Article Five - Amended to add a Member

Article Six - Amended to change the article from Restrictions to Prohibted Transactions

Article Seven · Amended to change the article on Dissolution and Liquidation

Article Fight - Amended to change the Registered Office and Registered Agent

Article Nine - Amended to name current Board of Directors

Article Ten - Amended to change the article from Limitation on Limitity of Directors to Liability and Indemnification

Delete Each of the provisions identified below are deleted from the certificate of formation.

#### Statement of Approval

Each new amendment has been made in accordance with the provisions of the Texas Business Organizations Code. The amendments to the certificate of formation and the restated certificate of formation have been approved in the manner required by the Code and by the governing documents of the entity.

#### **Required Statements**

The restated certificate of formation, which is attached to this form, accurately states the text of the certificate of formation being restated and each amendment to the certificate of formation being restated that is in effect, and as further amended by the restated certificate of formation. The attached restated certificate of formation does not contain any other change in the certificate of formation being restated except for the information permitted to be omitted by the provisions of the Texas Business Organizations Code applicable to the filing entity.

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#### Effectiveness of Filing (Select either A, B, or C.)

A. X This document becomes effective when the document is filed by the secretary of state.

B. This document becomes effective at a later date, which is not more than ninety (90) days from the date of signing. The delayed effective date is:

C. [.] This document takes effect upon the occurrence of the future event or fact, other than the passage of time. The 90<sup>th</sup> day after the date of signing is:

The following event or fact will cause the document to take effect in the manner described below:

#### Execution

The undersigned affirms that the person designated as registered agent in the restated certificate of formation has consented to the appointment. The undersigned signs this document subject to the penalties imposed by faw for the submission of a materially false or fraudulent instrument and certifies under penalty of perjury that the undersigned is authorized under the provisions of law governing the entity to execute the filing instrument.

Date: Tibriary 14, 307 :

PRESIDENT

By: THE SISTER CREEK CENTER FOR THE LIBERAL ARTS,

min m Currenn Signature of authorized person

Ţ

JAMES M, JUDSON Printed or typed name of authorized person (see instructions)

Attach the text of the amended and restated certificate of formation to the completed statement form. Identify the attachment as "Restated Certificate of Formation of [Name of Entity]."

Form 414

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#### ATTACHMENT TO AMENDED AND RESTATED CERTIFICATE OF FORMATION OF THE SISTER CREEK CENTER FOR THE LIBERAL ARTS

#### ARTICLE ONE NAME

The name of the filing entity is GREAT HEARTS AMERICA-TEXAS (the "Corporation").

#### ARTICLE TWO NON-PROFIL CORPORATION

The Corporation is a non-profit corporation.

#### ARTICLE THREE DURATION

The period of its duration is perpetual.

#### ARTICLE FOUR PURPOSES

This Corporation is organized and to be operated as a nonprofit corporation exclusively for charitable, scientific, literary or educational purposes, as a tax-exempt organization under sections 501(a) and 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provisions of any future United States revenue law). In furtherance of its exempt purpose, the Corporation will 1) administer property donated to the Corporation for charitable, scientific, literary or educational purposes; 2) distribute the donated property and the income from the property to or on behalf of qualified organizations and persons for charitable, scientific, literary or educational purposes; and 3) do and perform such acts as may be necessary or appropriate in carrying out the foregoing purposes of the Corporation. The character of affairs of the Corporation will be:

To operate public charter schools in Texas;

B. To develop each student's academic potential, personal character and leadership qualities through an academically rigorous and content-rich educational program grounded in the classical tradition; and

C. To strive to give every student the education he or she deserves and needs.



#### ARTICLE FIVE MEMBERSIUP

The Corporation will have one member. The Corporation's sole member will be Great Hearts America, an Arizona nonprofit corporation.

#### ARTICLE SIX PROHIBITED TRANSACTIONS

No part of the net earnings, gains or assets of the Corporation shall inure to the benefit of, or be distributable to, its members, directors, officers or other private persons, or organizations organized and operated for a profit, 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 its exempt purposes or as otherwise permitted by State law. 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. No part of the activities of the Corporation funded with state funds shall be used for lobbying as defined by Texas law. Notwithstanding any other provision of these Articles, the Corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income taxation under section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States revenue law) and/or (2) by a corporation, contributions to which are deductible under sections 170(c)(2), 2055(a)(2) and 2522(a)(2) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States revenue law) and/or 3) as otherwise prohibited by Texas law applicable to open-enrollment charter holders or charter schools.

#### ARTICLE SEVEN DISSOLUTION AND LIQUIDATION

Upon the dissolution or liquidation of this Corporation, assets of the Corporation that are considered public property under Texas law will be distributed in accordance with Texas law and under the Commissioner of Education's supervision. For remaining assets, the board of directors will, after paying or making provision for the payment of all the liabilities of the Corporation, distribute all of the assets of the Corporation exclusively for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code (or the corresponding provisions of any future Federal tax code) or will be distributed to the federal government, or to a state or local government, for a public purpose. Any assets not so disposed will be disposed of by a court of competent jurisdiction of the county in which 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.





### ARTICLE EIGHT REGISTERED OFFICE AND REGISTERED AGENT

The address of the initial registered office of the Corporation is 350 N. St. Paul Street, Suite 2900, Dallas, TX 75201-4234 and the name of its initial registered agent at the address is C T Corporation Systems."

1. The amendment changes Article Nine of the Certificate of Formation by eliminating the reference to the initial directors. The article is amended to read as follows:

### ARTICLE NINE DIRECTORS

The management of the affairs of the Corporation is vested in the Board of Directors. The names and addresses of the members of the Board of Directors of the Corporation in February 2012 are:

Peter Bezanson 9425 N. Arroya Vista Drive Phoenix, AZ 85028 Daniel P. Scoggin 3106 E. Lexington Avenue Gilbert, AZ 85234

Ward Huseth 3501 E. Camelback Road, Apt. #120 Phoenix, AZ 85018

### ARTICLE TEN LIABILITY AND INDEMNIFICATION

The personal liability of any director of the Corporation to the Corporation or its members or to other persons for monetary damages for breach of fiduciary duties as a director is hereby eliminated to the fullest extent allowed under the Texas Business Organizations Code and Texas Education Code as amended from time to time. The Corporation will indemnify, to the maximum extent from time to time permitted by applicable law, any person who incurs liability or expense by reason of such person acting as an incorporator, director, officer, employee, or agent of the Corporation. This indemnification will be mandatory in all circumstances in which indemnification is permitted by law.

3



### ARTICLE ELEVEN DISCRIMINATION

The Corporation will not practice or permit discrimination on the basis of sex, age, race, national origin, religion, relation, physical handicap or disability or any other legal protected classification under applicable law.

By:

THE SISTER CREEK CENTER FOR THE LIBERAL ARTS, a Texas nonprofit corporation

x

Date Signed: February 16, 2012

JAMES M. JUDSON, President

3739804 Webruary 16, 2012 110115 003



### THE SISTER CREEK CENTER FOR THE LIBERAL ARTS, a Texas nonprofit corporation

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### **Consent in Lieu of Meeting of Directors**

The undersigned, being all of the Directors of THE SISTER CREEK CENTER FOR

THE LIBERAL ARTS, an Texas nonprofit corporation (the "Corporation"), hereby consent, in

accordance with the provisions of the Texas Business Organizations Code in lieu of a meeting of

the Board of Directors of the Corporation (the "Directors"), to the adoption of the following

resolutions:

WHEREAS, the Directors deem it necessary to confirm a change in the Corporation's name and certain other changes to the Corporation's Certificate of Incorporation;

WHEREAS, the Directors deem it necessary to confirm their election of new Directors;

WHEREAS, the Corporation's bylaws provide that the Certificate of Incorporation may be amended and new Directors appointed by a 2/3 vote of the Directors;

NOW THEREFORE IT IS RESOLVED:

RESOLVED, that the Restated Certificate of Formation With New Amendments to the Articles of Incorporation, in substantially the same form as presented, is hereby ratified and approved by a unanimous vote of the Board of Directors.

FURTIMER RESOLVED, that the President of the Corporation is hereby authorized, empowered and directed to perform such acts and execute and deliver the instruments and documents as may be necessary or appropriate in order to carry out the purpose of the foregoing resolutions.

RESOLVED, that the following named persons are hereby elected to serve as the Directors to serve until the next annual meeting of the Directors or until their successors are duly elected and qualified:

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Pcter Bezanison Daniel P. Scoggin Ward Huseth

This consent shall be effective February \_ 17, 2012 and shall be filed in the minute

11.0

hook of the Corporation.

Sara Gay Judson, Tirector Judgon\_ Sara Gay Judson, Tirector

CHR117. GITOR Charles Karcher, Director

James Lazarus, Director

1739806 INFebruary 15, 2012 110115-001

112 Great Hearts



### ATTACHMENT G GREAT HEARTS AMERICA – TEXAS

BYLAWS OF SPONSORING ENTITY AND ALL AMENDMENTS



### AMENDED AND RESTATED BYLAWS OF GREAT HEARTS AMERICA—TEXAS

### formerly known as THE SISTER CREEK CENTER FOR THE LIBERAL ARTS

### ARTICLE I

The name of this school will be GREAT HEARTS AMERICA-TEXAS, a Texas nonprofit corporation.

### ARTICLE II PURPOSE

Great Hearts America—Texas (the "Corporation") is a tuition-free charter public school in one or more locations throughout the state that will enable students to: (1) acquire critical reasoning and communication skills; and (2) explore the cultural and scientific achievements at the heart of the liberal arts and sciences. The Corporation will promote a curriculum emphasizing personal integrity, creative imagination, community service, and a lifelong quest for learning. The Corporation will not deny admission based on ethnicity, national origin, gender, income level, disability, religion, academic ability, artistic ability, athletic ability or the public school district that the child would otherwise attend under Texas law, or any other factors prohibited by law. The Corporation may deny admission to a student with a documented history of criminal offense, a juvenile court adjudication or discipline problems under Texas Education Code Subchapter A, Chapter 37.

### ARTICLE III MEMBER

The Corporation will have one member, Great Hearts America, an Arizona nonprofit corporation ("Great Hearts—America" or "Member"). The Member will have all the authority set forth in the Corporation's Articles of Incorporation (the "Articles of Incorporation") and these Bylaws.

### ARTICLE IV BOARD OF DIRECTORS

Section 1. <u>Powers</u>. The Board of Directors of the Corporation, ("Board") will be responsible for the adoption and implementation of policy for the Corporation and for the management, operation and accountability of the charter school in all locations. Without limiting the Board's authority, the following powers and duties must generally be exercised by the Board, acting as a body corporate in meetings posted in compliance with Texas Government Code Chapter 551:

114 GreatHearts

•Final authority to hear or decide employee grievances, citizen complaints or parental concerns;

•Final authority to adopt or amend the budget of the charter holder or the charter school;

•Final authority to authorize the expenditure or obligation of state funds or the use of public property;

•Final authority to direct the disposition or safekeeping of public records;

•Final authority to adopt policies governing charter school operations;

•Final authority to approve audit reports under Texas Education Code § 44.008(d); and

•Initial or final authority to select, employ, direct, evaluate, renew, non-renew, terminate, or set compensation for any chief executive officer or officers.

Section 2. <u>Number and Election Term</u>. There will be not less than three (3) or more than seven (7) Directors. The number of Directors may be increased or decreased in accordance with Section 3 of this Article, but in no case will the number of Directors be less than three (3). Each Director will serve for a one (1) year term and until his or her successor is appointed. A Director whose term has expired may be appointed to succeed him or herself.

Section 3. <u>Additional Directors and Vacancies</u>. The Board will appoint such additional Directors or replacement Directors as it deems necessary, subject to the Member's approval, which approval will not be unreasonably withheld, conditioned or delayed. A person appointed as a Board member to fill an unexpired term on the Board of less than one (1) year will hold office until the next annual meeting of the Board or until his or her successor is appointed.

Section 3A. <u>Appointment and Removal of Board Members</u>. All Directors must be annually appointed or reappointed according to the provisions of section 3 above. Directors may be removed as set forth in Section 4 below.

Section 4. <u>Removal and Resignation</u>. Any of the Directors may be removed with or without cause by the Board, subject to the Member's approval, which approval the Member may not unreasonably withhold, condition or delay. A Director who is removed in accordance with this section will also be deprived of his or her status as an officer of the Corporation. Any Director who is absent from more than three (3) consecutive meetings of a Board meeting in any fiscal year may be removed automatically, unless the Board acts affirmatively to retain the Director. A Director may resign at any time by written notification to the Corporation at its principal office, or to the Corporation's statutory agent. Unless otherwise specified in the notice, the notice will be effective upon receipt by the Corporation.

Section 5. <u>Compensation</u>. Directors will serve without compensation for their services as Directors, although they may be reimbursed for all necessary and reasonable expenses of attending meetings and otherwise performing their duties.

Section 6. Quorum. A quorum will consist of a majority of the Board members then in office. Unless otherwise specified in these Bylaws or the Articles of Incorporation, every act or decision made by a majority of the Directors present at a duly held meeting at which a quorum is present will be regarded as the act of the Board. Each Director will have one (1) vote. Section 7. <u>Annual Meeting</u>. The annual meeting of the Board of Directors will be held in June of each calendar year or such other month as will be determined by the Board. At the annual meeting, the incumbent Directors will transact such business as may be properly brought before the meeting. If for any reason an annual meeting is not held on the day set forth above, a deferred annual meeting will be thereafter called and held in lieu thereof, at which the same proceedings may be conducted.

Section 8. <u>Regular Meetings</u>. Regular meetings of the Board will be held at least once a quarter each calendar year, on the campus of Corporation, or such other time or place as the Board by resolution may determine.

Section 9. <u>Special Meetings</u>. Special meetings of the Board may be held at any time or place upon the call of the President or the Vice President or at the written request of three (3) Directors or the Member.

Section 10. Notice of Meetings to Directors. Not less than 72 hours nor more than thirty (30) days (inclusive of the date of meeting) before the date of any meeting of the Board, the Secretary of the Corporation, or any other officer of the Corporation, will cause a written notice setting forth the time, place, and general purposes of the meeting to be delivered personally, to be sent by facsimile, or by e-mail, or to be deposited in the mail, with first class or airmail postage prepaid, addressed to each Director of record at his or her last address (including e-mail) or facsimile number as it appears in the Corporation's records. Notice that is mailed to a Director must be deposited in the mail no less than three (3) days (exclusive of the date of the meeting) before the date of the meeting. Such notice will also be given to the Member in the same manner as notice to the Directors.

Section 11. <u>Public Notice of Meetings</u>. Public notice of all meetings of the Board, of the Executive Committee, of the Member (when transacting business concerning the Corporation) and of all committees authorized by the Board (collectively, the "Applicable Meetings" and singly an "Applicable Meeting") will be given pursuant to and as required by the Texas Open Meetings Act, referred to as the "Open Meetings Act"), for so long as the Open Meetings Act applies to charter schools. Notice of all the Applicable Meetings, except as otherwise provided by state law, regulation, the Articles on Incorporation, or these Bylaws, will be posted as described below at least 72 hours before the time of the meeting.

- (a) <u>Posting of Notice</u>: Notice to the public of any Applicable Meeting will be posted at the Corporation's administrative offices in a location convenient to the public at least 72 hours before the time of such meeting.
- (b) <u>Emergency Notice</u>: Emergency meetings as may be allowed under the Texas Open Meetings Act may be posted up to two hours before the meeting.
- (c) <u>Internet Posting</u>: Notice and the agenda of all meetings of the Board of Directors will also be posted on the Corporation's internet website, if any, concurrently with the notice posted at the Corporation's administrative

offices, or as otherwise required and authorized by the Texas Open Meetings Act.

- (d) <u>Closed Meetings</u>: The agenda will clearly state whether the Board intends to convene in a closed meeting, and will identify separately each matter to be deliberated by the Board in the closed meeting and whether the Board may take action on the identified matter upon returning to the open meeting. The Secretary will note the times in the open meeting that the Board convenes to and adjourns from the closed meeting.
- (e) <u>Agenda</u>: At each regular meeting of the Board, the Board will establish the order of business in an Agenda approved by the President and as presented in the notice of the meeting. However, the President may modify the order of business. The agenda will identify all matters to be presented to and considered by the Board. Matters not disclosed in the agenda and the meeting notice available to the public will not be deliberated or be considered by the Board, except as permitted by the Open Meetings Act.

Section 12. <u>Open Meetings Act</u>. The Corporation and the Board will comply in all respects with the Open Meetings Act.

Section 13. <u>Governing Rules</u>. The Directors may adopt, from time to time, rules to govern the conduct of their meetings. The rules will be binding, unless and until changed by a majority vote.

Section 14. <u>Minutes</u>. A written record of the discussions and decisions reached at each meeting of the Board in the form of minutes will be made, and will, upon approval by the Board at a legally-convened public meeting, be made a part of the records of the Corporation. The minutes will comply with the requirements set forth in the Open Meetings Act, Texas Education Code and other applicable Texas law.

### ARTICLE V OFFICERS

Section 1. <u>Designation of Titles</u>. The officers of the Corporation will be a President, a Vice President, and a Secretary and other officers, including Assistant Secretary, as from time to time, may be determined by the Board. The election of any officer of the Corporation will not of itself create contract rights in the office.

Section 2. <u>Election and Term</u>. The officers will be elected by the Board at the annual meeting of the Board of Directors, and each office will serve for a one (1) year term and until his or her successor is elected. Any officer may be elected to succeed him or herself.

Section 3. <u>Removal of Officers</u>. Any officer elected by the Board may be removed, with or without cause, at any time by the affirmative vote of two-thirds (2/3) of the voting Directors then in office. The officer in question will not vote on the question of removal, but may be present at the meeting and may be counted in determining the presence of a quorum.

Section 4. <u>Vacancies</u>. Any vacancy occurring in any office of the Corporation may be filled for the unexpired duration of the term by the Board.

Section 5. <u>President</u>. The President, subject to the direction of the Board, will have general charge of the business affairs and property of the Corporation and general supervision of its officers and agents. In general, he or she will perform all duties incident to the office of President, will see that all orders and resolutions of the Board and the Member are carried into effect, and will preside at meetings of the Board.

Section 6. <u>Vice President</u>. The Vice President, subject to the direction of the Board, will act for the President in his or her absence or incapacity and will have other duties as may be assigned to him or her by the Board.

Section 7. <u>Secretary</u>. The Secretary will attend all meetings of the Board and record all votes and proceedings of the Board in a book to be kept for that purpose, and will perform like duties for all committees of the Board, as necessary. He or she will give, or cause to be given, notice of the meetings to Directors and the Member and will perform such other duties as may, from time to time, be prescribed by the Board or the President, under whose supervision he or she will act. He or she will have custody of the seal of the Corporation, and authority to affix the same to any instrument requiring it, and, when affixed, the seal may be attested by his or her signature. The Board may give general authority to any officer to affix the seal of the Corporation and to attest the affixing thereof by his or her signature.

Section 8. <u>Other Officers</u>. The President will recommend to the Board for its approval such additional officers as may be necessary to the business of the Corporation, who will perform such duties and responsibilities as may be prescribed by the President.

### ARTICLE VI COMMITTEES

Section 1. <u>Standing Committees</u>. The Board may, in its discretion, authorize such standing committees and advisory boards as it deems appropriate. Membership on standing committees and advisory boards will be determined by the Board. The principal matters relating to that committee's or advisory board's areas of responsibility are for the purpose of making recommendations to the Board. Another purpose is to advise and make recommendations to the Board. The chairmanship of each standing committee or advisory board will be determined by the Board. The chairmanship of each standing committee or advisory board will be determined by the Board. It will be the responsibility of the chairmen of standing committees and advisory boards to notify members of meetings. However, no quorum will be required in order for a standing committee or advisory board to meet or to act. Chairmen of standing committees and

advisory boards will decide whether or not minutes of a committee or advisory board meeting are to be recorded. The President will be an ex-officio member of all standing committees and advisory boards, except committees or advisory boards where he or she is specifically designated as a voting member by the Board.

Section 2. <u>Special Committees</u>. Special committees may be appointed and discharged by the Board for special tasks as circumstances warrant. A special committee will be limited to the accomplishment of the task for which it was created and will have no power to act except as specifically conferred by the Board. Upon the completion of the task for which appointed, the special committee will l be discharged.

Section 3. <u>Extent of Authority</u>. No committee may exercise the authority of the Board in filling vacancies on any committee of the Board.

### ARTICLE VII

### SOLICITATION, ACCEPTANCE AND INVESTMENT OF FUNDS

Section 1. <u>Solicitation and Borrowing of Funds</u>. The Corporation may solicit contributions or borrow funds from any persons or corporations as the Directors deem appropriate, upon terms and conditions consistent with the provisions of the Articles of Incorporation and subject to the provisions of Sections 2 and 3 below.

Section 2. <u>Acceptance of Funds</u>. The Corporation may, upon prior, written approval from the Member (which approval will not be unreasonably withheld, conditioned or delayed), accept contributions, grants, and gifts from any persons, partnerships, corporations, government entities, or other entities upon such terms and conditions consistent with the provisions of the Articles of Incorporation and these Bylaws.

Section 3. <u>Borrowing Funds</u>. The Corporation may, upon the prior written approval from the Member (which approval will not be unreasonably withheld, conditioned or delayed), borrow funds for capital improvement, operations or other uses which the Board deems reasonably necessary and consistent with the provisions of the Articles of Incorporation and these Bylaws.

Section 4. <u>Investment of Funds</u>. The board will direct all investments of the Corporation's funds subject to the Member's periodic review and in accordance with Texas law.

### ARTICLE VIII

### INDEMNIFICATION OF DIRECTORS, OFFICERS, EMPLOYEES AND AGENTS

Section 1. <u>Non-Liability for Debts</u>. The private property of the Directors and Officers will be exempt from execution or the liability of any debts of the Corporation, and no Director or Officer will be liable or responsible for any debts or liabilities of the Corporation.

Section 2. <u>Indemnification</u>. Each Director, Officer, employee, and agent of the Corporation will be indemnified by the Corporation to the fullest extent permitted by law, as provided in the Articles of Incorporation.

### ARTICLE IX FISCAL YEAR

The fiscal year of the Corporation will commence on July 1 of each year and end on June 30.

### ARTICLE X AMENDMENT

The Bylaws and the Articles of Incorporation may be amended by the Member, in consultation with the Board and subject to the Board's final, written approval.

### ARTICLE XI CONFLICT OF INTEREST

### Section 1. Definitions.

(a) "Conflict of Interest" - A conflict of interest occurs when a Director places himself or herself in a position where his or her personal financial interests or those of his or her family are or may be antagonistic to his or her fiduciary duty to the Corporation.

(b) "Family" - Includes, but is not limited to, grandparents, parents, spouses, partners, children, aunts, uncles, siblings, in-laws, and other relatives of a similar degree of closeness.

Section 2. <u>Reporting and Disgualifications</u>. Directors will report possible conflicts of interest to the President, or if the President is the interested individual, to a Vice-President. The President (or Vice-President) will make a full report to the Board prior to any action on the transaction by the Corporation. Upon report of a possible conflict, the Board will conduct an investigation and determine whether a conflict of interest does exist and whether it is substantial. If the Board determines that a substantial conflict of interest exists, the interested individual will not vote on the transaction presenting the conflict. The interested individual may vote only if the Board determines that no conflict exists or the conflict is not substantial. No investigation or determination by the Board will be required if the interested individual voluntarily agrees to refrain from voting on the transaction presenting the potential conflict of interest. The interested individual may be counted in determining the presence of a quorum.

Section 3. <u>Valid Transactions</u>. Any transaction undertaken by the Corporation in which a Director or member of his or her family has a financial interest, will be valid, notwithstanding the presence of the interested person at any meeting at which the transaction is acted upon, if the procedures outlined in Section 2 of this Article have been complied with prior to the meeting.

### ARTICLE XII MISCELLANEOUS

Section 1. The Corporation may establish categories of support so that persons who regularly contribute may receive due recognition for the continuing support of the Corporation.

Section 2. It will be the policy of the Corporation to cooperate with other individuals, agencies, and organizations sharing its goals in whole or substantial part so as to avoid needless duplication of effort and to make maximum use of limited resources.

Section 3. <u>Prohibition Regarding Lending</u>. The Corporation will specifically not lend money or use its credit to assist its Directors, whether or not employees or officers.

Section 4. These Bylaws of the Corporation will supplement the Articles of Incorporation, and will provide for and govern the basic operation of the Corporation.

Section 5. The Corporation will not be authorized to issue memberships.

Section 6. The Corporation will comply in all respects with the Open Meetings Act, the Texas Public Information Act and other law applicable to Texas' open-enrollment charter schools chartered to corporations which qualify under 501(c)(3) of the Internal Revenue Code.

GREAT HEARTS AMERICA-TEXAS

Bv

2/20/2 Date:

3731541.2\February 2, 2012 110115.3



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### GREAT HEARTS AMERICA-TEXAS, a Texas nonprofit corporation

### Consent in Lieu of Meeting of the Sole Member and the Directors

The undersigned, being the sole Member and all of the Directors of GREAT HEARTS

AMERICA-TEXAS, a Texas nonprofit corporation (the "Corporation"), in accordance with the

provisions of the Texas Business Organizations Code and in lieu of a meeting of the Member and

the Corporation's Board of Directors, hereby consent to the adoption of the following

resolutions:

- 1. RESOLVED: That the Certificate of Incorporation, as amended by the Restated Certificate of Formation With New Amendments filed with the Texas Secretary of State on February 21, 2012, be and hereby is adopted and that a copy of the Certificate of Incorporation be filed in the Corporation's minute book (the "Minute Book").
- 2. RESOLVED: That the set of proposed Bylaws for the Corporation presented herewith be and hereby are adopted as the Bylaws of the Corporation and that the original of these same Bylaws be filed in the Minute Book.
- 3. RESOLVED: That the fiscal year of the Corporation for all accounting purposes, income tax purposes, reports to public agencies and all other purposes usually recognized in connection with the meaning of the term "fiscal year" shall end on June 30 of each year.
- RESOLVED: That the following named persons are elected to the offices stated beside their respective names to hold that office until their successors have been duly elected:

Peter Bezanson	President
Daniel P. Scoggin	Vice President
Ward Huseth	Secretary/Treasurer

5. RESOLVED: That a bank account in the name of the Corporation be opened at BBVA Compass and that the checks of the Corporation on said account be signed by the following named persons:

### Peter Bezanson, Ward Huseth and Daniel P. Scoggin

RESOLVED FURTHER: That the resolution or resolutions required by the bank for the opening of the bank account, and the signing of checks as set forth herein be and the same is hereby considered as passed.

RESOLVED FURTHER: That the Secretary is hereby authorized to certify the passage of these resolutions, as required by the bank.

- RESOLVED: That the President be and hereby is authorized to pay all fees and expenses incident to and necessary for the organization of the Corporation and to reimburse all such expenses as incurred on behalf of the Corporation.
- RESOLVED, that any actions taken by President or Secretary prior to the date of the foregoing resolutions adopted hereby are within the authority conferred thereby and are hereby ratified, confirmed and approved as the acts and deeds of the Corporation.
- RESOLVED: That Great Hearts America, the Corporation's sole member be reimbursed for out-of-pocket expenses in establishing the Corporation's business presentation to the Corporation's officers of adequate documentation, the reimbursement to be made at such time as the Corporation has adequate funds to for the expenses.
- 9. RESOLVED: That the officers of the Corporation be, and they hereby are further authorized and empowered to do any and all other and further things and matters, of every nature whatsoever, which such officers, in their sole and unlimited discretion, shall deem necessary or proper for the purpose of effectuating and carrying out the intent and purposes of the resolutions herein adopted, looking towards the completion of all acts and matters in connection with the full organization and operation of the Corporation; and
- RESOLVED FURTHER: That all acts and things heretofore done for and on behalf and in the name of the Corporation by the Corporation's sole member, GREAT HEARTS AMERICA, and the law firm of UDALL, SHUMWAY & LYONS, P.L.C. be, and the same hereby are, ratified and affirmed in each, all and every respect.

123 GreatHearts

This consent shall be effective February 21, 2012 and shall be filed in the minute book

of the Corporation.

GREAT HEARTS AMERICA, an Arizona nonprofit corporation

By:

Daniel P. Scoggin, President

PETER BEZANSON, Director

WARD HUSETH, Director

DANIEL P. SCOGGIN, Director

3739807.2\February 21, 2012 110115.003



### THE SISTER CREEK CENTER FOR THE LIBERAL ARTS, a Texas nonprofit corporation

#### **Consent in Lieu of Meeting of Directors**

The undersigned, being all of the Directors of THE SISTER CREEK CENTER FOR

THE LIBERAL ARTS, an Texas nonprofit corporation [the "Corporation"), hereby consent, in

accordance with the provisions of the Texas Business Organizations Code in lieu of a meeting of

the Board of Directors of the Corporation (the "Directors"), to the adoption of the following

resolutions:

WHEREAS, the Directors deem it necessary to confirm a change in the Corporation's name and certain other changes to the Corporation's Certificate of Incorporation;

WHEREAS, the Directors deem it necessary to confirm their election of new Directors;

WHEREAS, the Corporation's bylaws provide that the Certificate of Incorporation may be amended and new Directors appointed by a 2/3 vote of the Directors;

NOW THEREFORE IT IS RESOLVED:

RESOLVED, that the Restated Certificate of Formation With New Amendments to the Articles of Incorporation, in substantially the same form as presented, is hereby ratified and approved by a unanimous vote of the Board of Directors.

FURTHER RESOLVED, that the President of the Corporation is hereby authorized, empowered and directed to perform such acts and execute and deliver the instruments and documents as may be necessary or appropriate in order to carry out the purpose of the foregoing resolutions.

RESOLVED, that the following named persons are hereby elected to serve as the Directors to serve until the next annual meeting of the Directors or until their successors are duly elected and qualified:



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Pcter Bezarison Daniel P. Scoggin Ward Huseth

This consent shall be effective February \_ 17, 2012 and shall be filed in the minute hook of the Corporation.

Sara Gay Judson, Tirector, Judson, Director, Judson, Director

CHAIT. Sittor Charles Karcher, Director ( 1 ) )

James Lazarus, Director

3739806 (VFebruary 15, 2012 110115 001



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Corporations Section P.O.Box 13697 Austin, Texas 78711-3697



Hope Andrade Secretary of State

### Office of the Secretary of State

### CERTIFICATE OF FILING OF

The Sister Creek Center for the Liberal Arts 800093132

The undersigned, as Secretary of State of Texas, hereby certifies that a Restated Certificate of Formation for the above named domestic nonprofit corporation has been received in this office and has been found to conform to the applicable provisions of law.

ACCORDINGLY, the undersigned, as Secretary of State, and by virtue of the authority vested in the secretary by law, hereby issues this certificate evidencing filing effective on the date shown below.

Dated: 02/21/2012

Effective: 02/21/2012



Sand

Hope Andrade Secretary of State

## 126A GreatHearts

 Come visit us on the internet at http://www.sos.state.tx.us/

 Phone: (512) 463-5555
 Fax: (512) 463-5709

 Received Time: Feb. 21. in 2012
 3:29PM No. 3338
 TID: 10313

Dial: 7-1-1 for Relay Services Document: 409452380002

### \_Feb. 20. 2012. 3:17PM Schulman Lopez & Hoffer LLP

Form 414 (Revised 05/11) Submit in duplicate to: Secretary of State P.O. Box 13697 Austin, TX 78711-3697 512 463-5555 FAX: 512/463-5709 Filing Foe: See instructions	Restated Certificate of Formation With New Amendments	FileD In the Office of the Secretary of State of Texas FEB 2 1 2012 Corporations Section
	Entity Information	
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### Amendments to Certificate of Formation

This restated certificate of formation makes new amendments to the certificate of formation. Provided below is an identification by reference or description of each added, altered, or deleted provision.

#### Identification of New Amendments

(Indicate the changes that have been made by checking the appropriate hox or boxes.)

7

- I The entity name has been umended.
- I The registered agent name or registered office address has changed.
- I'he purpose of the entity has been amended.
- The period of duration of the entity has been amended.
- A general partner has withdrawn or been admitted to the limited partnership.

#### Form 414

1 CONTRACT AND AND CT System Union



No. 3323

P. 2

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### Identification of New Amendments (conunsed)

(Indicate the changes that have been made by checking and completing the appropriate box or boxes.)

X Other changes. The certificate of formation has been amended as follows:

Add Each of the following provisions is added to the certificate of formation. The identification or reference of each added provision is set forth below. The full text of each added provision is contained in the amended and restated certificate of formation attached hereto.

Article Twelve - Added to include a provision on Discrimination.

After The following identified provisions of the certificate of formation are amended. The full text of each amended provision is contained in the amended and restated certificate of formation attached hereto.

Article One - Amended to change Name Article Eleven - is amended and replaced by a new Article Four - Amended to reflect changes to the purpose of the Corporation Article Eleven concerning Discrimination Article Five - Amended to add a Member

Article Six - Amended to change the article from Restrictions to Prohibted Transactions

Article Seven - Amended to change the article on Dissolution and Liquidation

Article Fight - Amended to change the Registered Office and Registered Agent

Article Nine - Amended to name current Board of Directors

Article Ten - Amended to change the article from Limitation on Limbility of Directors to Liability and Indemnification

Delete Each of the provisions identified below are deleted from the certificate of formation.

### Statement of Approval

Each new amendment has been made in accordance with the provisions of the Texas Business Organizations Code. The amendments to the certificate of formation and the restated certificate of formation have been approved in the manner required by the Code and by the governing documents of the entity.

### **Required Statements**

The restated certificate of formation, which is attached to this form, accurately states the text of the certificate of formation being restated and each amendment to the certificate of formation being restated that is in effect, and as further amended by the restated certificate of formation. The attached restated certificate of formation does not contain any other change in the certificate of formation being restated except for the information permitted to be omitted by the provisions of the Texas Business Organizations Code applicable to the filing entity.

Form 414

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### Effectiveness of Filing (Select either A, B, or C.)

A. X This document becomes effective when the document is filed by the secretary of state.

B. This document becomes effective at a later date, which is not more than ninety (90) days from the date of signing. The delayed effective date is:

C. [..] This document takes effect upon the occurrence of the future event or fact, other than the possage of time. The 90<sup>th</sup> day after the date of signing is:

The following event or fact will couse the document to take effect in the manner described below:

#### Execution

The undersigned affirms that the person designated as registered agent in the restated certificate of formation has consented to the appointment. The undersigned signs this document subject to the penalties imposed by law for the submission of a materially false or fraudulent instrument and certifies under penalty of perjury that the undersigned is authorized under the provisions of law governing the entity to execute the filing instrument.

Date: Irbrary 16, 2012

PRESIDENT

IN: THE SISTER CREEK CENTER FOR THE LIBERAL ARTS.

Signature of authorized person

JAMES M. JUDSON

Printed or typed name of authorized person (see instructions)

Attach the text of the amended and restated certificate of formation to the completed statement form. Identify the attachment as "Restated Certificate of Formation of [Name of Entity]."

Form 414



### ATTACHMENT TO AMENDED AND RESTATED CERTIFICATE OF FORMATION OF THE SISTER CREEK CENTER FOR THE LIBERAL ARTS

### ARTICLE ONE NAME

The name of the filing entity is GREAT HEARTS AMERICA-TEXAS (the "Corporation").

### ARTICLE TWO NON-PROFIT CORPORATION

The Corporation is a non-profit corporation.

### ARTICLE THREE DURATION

The period of its duration is perpetual.

### ARTICLE FOUR PURPOSES

This Corporation is organized and to be operated as a nonprofit corporation exclusively for charitable, scientific, literary or educational purposes, as a tax-exempt organization under sections 501(a) and 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provisions of any future United States revenue law). In furtherance of its exempt purpose, the Corporation will 1) administer property donated to the Corporation for charitable, scientific, literary or educational purposes: 2) distribute the donated property and the income from the property to or on behalf of qualified organizations and persons for charitable, scientific, literary or educational purposes; and 3) do and perform such acts as may be necessary or appropriate in earrying out the foregoing purposes of the Corporation. The character of affairs of the Corporation will be:

To operate public charter schools in Texas;

B. To develop each student's academic potential, personal character and leadership qualities through an academically rigorous and content-rich educational program grounded in the classical tradition; and

C. . To strive to give every student the education he or she deserves and needs.



GreatHearts

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### ARTICLE FIVE MEMBERSHIP

The Corporation will have one member. The Corporation's sole member will be Great Hearts America, an Arlzona nonprofit corporation.

### ARTICLE SIX PROHIBITED TRANSACTIONS

No part of the net earnings, gains or assets of the Corporation shall inure to the benefit of, or he distributable to, its members, directors, officers or other private persons, or organizations organized and operated for a profit, 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 its exempt purposes or as otherwise permitted by State law. 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 intervenc in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. No part of the activities of the Corporation funded with state funds shall be used for lobbying as defined by Texas law. Notwithstanding any other provision of these Articles, the Corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income taxation under section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States revenue law) and/or (2) by a corporation, contributions to which are deductible under sections 170(c)(2), 2055(a)(2) and 2522(a)(2) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States revenue law) and/or 3) as otherwise prohibited by Texas law applicable to open-enrollment charter holders or charter schools.

### ARTICLE SEVEN DISSOLUTION AND LIQUIDATION

Upon the dissolution or liquidation of this Corporation, assets of the Corporation that are considered public property under Texas law will be distributed in accordance with Texas law and under the Commissioner of Education's supervision. For remaining assets, the board of directors will, after paying or making provision for the payment of all the liabilities of the Corporation, distribute all of the assets of the Corporation exclusively for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code (or the corresponding provisions of any future Federal tax code) or will be distributed to the federal government, or to a state or local government, for a public purpose. Any assets not so disposed will be disposed of by a court of competent jurisdiction of the county in which located, exclusively for such purposes or to such organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

2

### ARTICLE FIGHT REGISTERED OFFICE AND REGISTERED AGENT

The address of the initial registered office of the Corporation is 350 N. St. Paul Street, Suite 2900, Dallas, TX 75201-4234 and the name of its initial registered agent at the address is C T Corporation Systems."

 The amendment changes Article Nine of the Certificate of Formation by eliminating the reference to the initial directors. The article is amended to read as follows:

### ARTICLE NINE DIRECTORS

The management of the affairs of the Corporation is vested in the Board of Directors. The names and addresses of the members of the Board of Directors of the Corporation in February 2012 are:

Peter Bezanson 9425 N. Arroya Vista Drive Phoenix, AZ 85028

GreatHearts

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Daniel P. Scoggin 3106 E. Lexington Avenue Gilbert, AZ 85234

Ward Huseth 3501 E. Camelback Road, Apt. #120 Phoenix, AZ 85018

### ARTICLE TEN LIABILITY AND INDEMNIFICATION

The personal liability of any director of the Corporation to the Corporation or its members or to other persons for monetary damages for breach of fiduciary duties as a director is hereby eliminated to the fullest extent allowed under the Texas Business Organizations Code and Texas Education Code as amended from time to time. The Corporation will indemnify, to the maximum extent from time to time permitted by applicable law, any person who incurs liability or expense by reason of such person acting as an incorporator, director, officer, employee, or agent of the Corporation. This indemnification will be mandatory in all circumstances in which indemnification is permitted by law.

### ARTICLE ELEVEN DISCRIMINATION

The Corporation will not practice or permit discrimination on the basis of sex, age, race, national origin, religion, relation, physical handicap or disability or any other legal protected classification under applicable law.

By:

THE SISTER CREEK CENTER FOR THE LIBERAL ARTS, a Texas nonprofit corporation

Date Signed: February 16, 2012

JAMES M. JUDSON, President

3739804 34February 16, 2012 110115 003



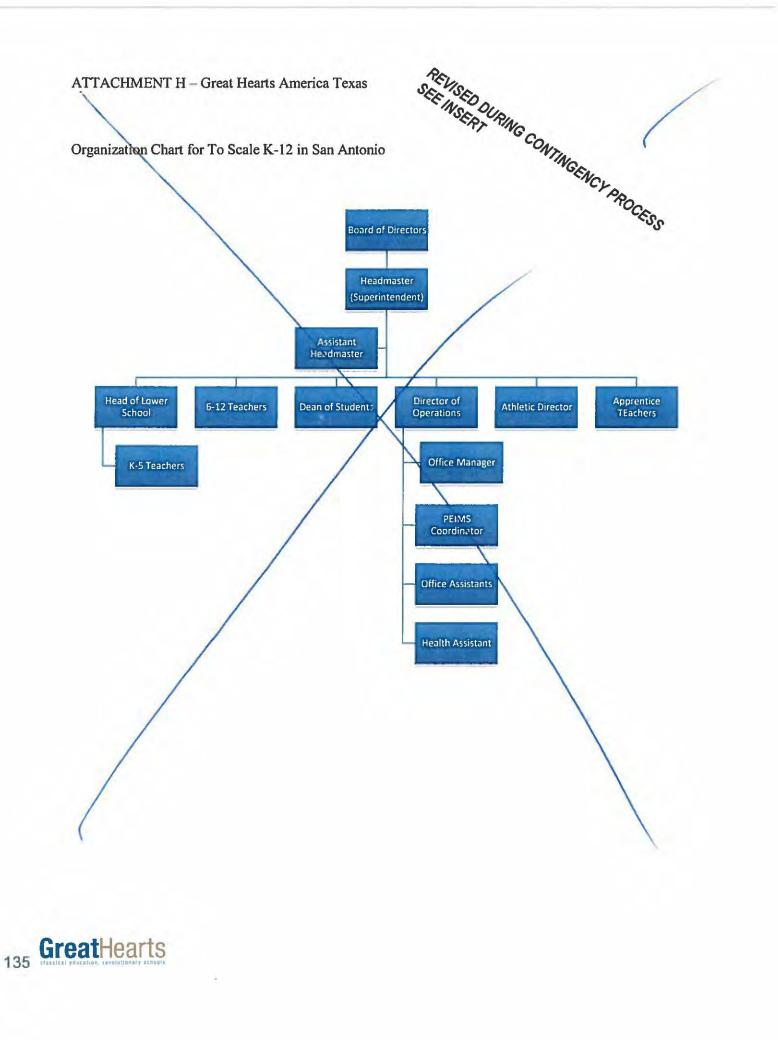
ATTACHMENT H GREAT HEARTS AMERICA – TEXAS

ORGANZATIONAL CHART



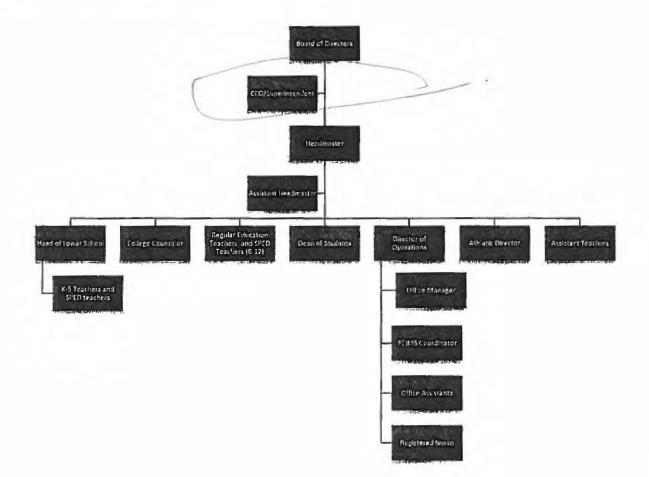
Attachments H and I (p. 135) – Clarify the following positions: 1) CEO/Superintendent, 2) Headmaster/Superintendent, 3) Headmaster/Principal. Submit the following revised documents that use consistent language and are in alignment regarding the positions noted above. Ensure that each position budgeted has an HR form and is on the organizational chart: 1) Organizational chart, 2) HR forms, 3) Start-up and year one budgets. Provide a statement as to why the budgets do not include a SuperIntendent position since this position included an HR form and is on the organizational chart.

APPROVED DURING CONTINGENCY PROCESS



APPROVED DURING CONTINGENCY PROCESS ATTACHMENT H – Great Hearts America Texas

Organization Chart for To Scale K-12 in San Antonio



### ATTACHMENT I GREAT HEARTS AMERICA – TEXAS

SUPPLEMENTAL HUMAN RESOURCES INFORMATION FORMS



### REVISED DURING CONTINGENCY PROCESS SEE INSERT

#### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

Enter the name of	f the sponsoring entity: Great	at Hearts Academies, Inc.
Enter the name o	f the proposed charter school;	Great Hearts Academy - San Antonio
Position: CEO/Superinte	endent	Reports to: Charter Holder Board of Directors
	Salary Range: \$70,000	0 - \$100,000
	orm of remuneration (i.e., car a this position. In none, please :	illowance, cell phone, memberships, travel or housing allowance, etc) to be state N/A.
Cell Allowance/ Cell Ph	one	
Proposed Location (City a	and County): San Antonio	
	L	in year five: 993
Proposed Location (City a Number of Students antici Minimum Qualifications	ipated in year one: 601	in year five: 993
Number of Students antici	ipated in year one: 601	In year five: 993
Number of Students antici Minimum Qualifications	ipated in year one: 601	
Number of Students antici Minimum Qualifications	pated in year one: 601 s Required: Bachelor's degree requ	
Number of Students antici Minimum Qualifications Education Required:	pated in year one: 601 s Required: Bachelor's degree requ	uired, Advanced degree preferred
Number of Students antici Minimum Qualifications Education Required:	pated in year one: 601 s Required: Bachelor's degree requ	uired, Advanced degree preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://manufield.ted.state.tx.ps\_11\_X\_AstJ.D.Web10005. Home.stopx. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$250,000 - 280,000
Northside ISD	015915	San Antonio	95,581	\$260,000 - \$290,000
North East ISD	015910	San Antonio	66,604	\$280,000 - 315,000

Page 1 of 2

SAS 536-12 RFA 701-11-108



	APPROVED DURING CONTINGENCY PROCESS
<b>Eighteenth Generation</b>	Open-Enrol
Supplemental Hu	man Resources Information Form
	(MUST be typed)
ill result in the applicat	tion being deemed "INCOMPLETE" during the review process
the sponsoring entity: Grea	t Hearts America - Texas
the proposed charter school:	Great Hearts Academies - San Antonio
dent	Reports to: Charter Holder Board of Directors
Salary Range: \$135.00	0-\$200.000
Salary Kange, 19199,000	
m of remuneration (i.e., car a	lowance, cell phone, memberships, travel or housing allowance, etc) to be
•	
d County): San Antonio	
ated in year one: 601	In year five: 993
Required:	
Bachelor's degree require	ed, advanced degree preferred
3+ years teaching experie	ence required; school leadership experience
none	
	three different traditional districts comparable in size, student make-up, and iation ISD or CISD. County district numbers may be accessed on line through
ory found at http://mansfield.	tca.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx. Additionally, traditional
ght as the fourth digit in the c	
	# of Students Located in (City) Served Salary Range
	ill result in the applicat the sponsoring entity: Grea the proposed charter school: dent Salary Range: \$135,000 m of remuneration (i.e., car at his position. In none, please s e d County): San Antonio ated in year one: 601 Required: Bachelor's degree require 3+ years teaching experie none none

Name of District	CDN	Located in (City)	Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$250,000-\$280,000
Northside ISD	015915	San Antonio	95,581	\$260,000-\$290,000
North East ISD	015910	San Antonio	66,604	\$280,000-\$315,000
	and the second second			040 620

## REVISED DURING CONTINGENCY PROCESS

#### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process.

Enter the name of the sponsoring entiry:	reat Hearts Academies, Inc.	
Enter the name of the proposed charter schoo	ol: Great Hearts Academy - San Antonio	
Position: CEO/Superintendent	Reports to: Charter Holder Board of Directors	
ob Duties: List up to 10 key duties this indiv	vidual will perform.	
. The Superintendent position for Great Hearts A	Academis is known as the Headmaster	
2. Applies the standard policies and regulations o	of a Great Hearts Academy and those established by the local Board	] /
B. Develops, at the direction of the Board of Dire	ectors, policies and procedures for the effective functioning of the school	
A. Recruits, hires, supervises, and annually evaluated	ates faculty and staff	]
. Provides for and directs professional developm	nent opportunities for the staff	
Advertises, recruits, interviews, and enrolls stu	idents in the school	]
7. Runs an annual orientation program for all teau	chers	]
8. Provides for the safe and orderly environment	of the school by establishing and maintaining standards of conduct	]
). Supervises the maintenance and development of	of the school buildings and grounds	]
10. Administers and manages the annual budge a	s finally adopted by the Board	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2

SAS 536-12 RFA 701-11-108



# APPROVED DURING CONTINGENCY PROCESS

### pen-Enrollment Charter Application an Resources Information Form (MUST be typed)

Enter	the name of the sponsoring entity: Gr	eat Hearts America - Texas
Enter	the name of the proposed charter school	l: Great Hearts Academies - San Antonio
sition:	CEO/Superintendent	Reports to: Charter Holder Board of Directors
b Dutie	s: List up to 10 key duties this indiv	idual will perform.
Hires,	supervises, directs, and evaluates all cen	tral office staff/functions
. Ensure	s constant improvement of central office	e services to schools
Develo	ps and manages the corporate budget an	d business plan
. Recruit	s, hires, mentors/supervises and evaluat	es all Heads of School, ensuring achievement of academy/network goals
. Overse	es the strategic expansion of current and	future school sites
Report	s on a quarterly basis to executive board	on the status of the corporation, adherence to the milestones/business plan
. Works	closely with Board officers to expand th	e Board of Directors in influence and talent
. Serves	as the primary spokesperson for the cor	poration to all external entities

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Augumen			APPROVED DO	JRING CONTING	ENCYPROCESS
	E	Supplemental Hu	o Open-Enrollment C Iman Resources Infor (MUST be typed)	Charles and the second s	ion
NY areas left l	blank will	result in the applicat	ion being deemed "I	NCOMPLETE"	during the review proce
Enter the	name of the	sponsoring entity: Grea	t Hearts America - Texas		
Enter the	name of the	proposed charter school:	Great Hearts Academies	- San Antonio	
Position: Headm	aster		Reports to: CEO		
		Saiary Range: \$70,000-	\$125,000		
		of remuneration (i.e., car a position. In none, please s		berships, travel or ho	busing allowance, etc) to be
none					
		County): San Antonio, Be d in year one: 601		93	]
Minimum Quali	fications Re	quired:			
Education Require	ed:	Bachelor's degree require	ed, advanced degree prefe	erred	
Experience Requi	red:	3+ years teaching require	ed; school leadership expe	erience preferred	
Certification Requ	uired:	none			
location. A tradition the Texas Education	onal district i on Directory	s identified by the abbrevi found at <u>http://mansfield.</u>	ation ISD or CISD. Count	y district numbers m D.Web/Forms/Home	in size, student make-up, and ay be accessed on line through <u>aspx</u> . Additionally, traditiona
Name of District	-	CDN	Located in (City)	Served	Salary Range
San Antonio ISD		015907	San Antonio	55,116	\$74,000-\$105,000
Northside ISD		015915	San Antonio	95,581	\$66,000-\$116,000

SAS 539-13 RFA 701-13-101

\$74,000-\$124,000

66,604

San Antonio

015910

North East ISD

# APPROVED DURING CONTINGENCY PROCESS

## A Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

Enter the name of the sponsoring entity:	Freat Hearts America - Texas
Enter the name of the proposed charter scho	ol; Great Hearts Academies - San Antonio
osition: Headmaster	Reports to: CEO
ob Duties: List up to 10 key duties this indi	vidual will perform.
I. Applies the standard policies and regulations	of a Great Hearts academy and those established by the local Board
2. Develops, at the direction of the Board, polic	ies and procedures for the effective functioning of the school
Administers and manages the annual budget a	as finally adopted by the Board
4. Recruits, hires, supervises, and annually evaluate	uates faculty and staff
5. Provides for and directs professional develop	ment opportunities for the staff
5. Provides for and directs professional develop	ment opportunities for the staff
<ol> <li>5. Provides for and directs professional develop</li> <li>6. Advertises, recruits, interviews, and enrolls st</li> <li>7. Runs an annual orientation program for all terms</li> </ol>	ment opportunities for the staff

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Seventeenth Generation Open-Enrollment Charter Appli	cation
Supplemental Human Resources Information Form	È.
(MUST be typed)	

Enter the name o	f the sponsoring entity: Grea	it Hearts America - Texas
Enter the name o	f the proposed charter school:	Great Hearts Academies - San Antonio
osition: Assistant Hea	dmaster	Reports to. Headmaster
	Salary Range: \$50,000	- \$80,000
	rm of remuneration (i.e., car a this position. In none, please s	llowance, cell phone, memberships, travel or housing allowance, etc) tate N/A.
Non-concernance and an and the state		
ione		and the second
юле		
	ind County). San Antonio, B	
roposed Location (City a		
roposed Location (City a lumber of Students antici	pated in year one: 601	exer County
roposed Location (City a	pated in year one: 601 s Required:	exer County
roposed Location (City a lumber of Students antici finimum Qualifications	pated in year one: 601 s Required:	exar County In year five: 993
roposed Location (City a lumber of Students antici finimum Qualifications	pated in year one: 601 s Required:	exar County In year five: 993 uired, Advanced Degree Preferred
roposed Location (City a lumber of Students antici finimum Qualifications ducation Required:	pated in year one: 601 s Required: Bachelor's Degree Req	exar County In year five: 993 uired, Advanced Degree Preferred

location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://manstickl.ten.state.tv.ns/1FAAsk1112 Web10mis1(one.asps. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Studen Served	ts Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000 - \$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000 - \$78,000
North East ISD	015910	San Antonio	66,604	\$62,000 - 82,000

Page 1 of 2



ANY areas left blank wi	li result in the application bein	g deemed "INCOMPLETE"	during the review pro	cess.
-------------------------	-----------------------------------	-----------------------	-----------------------	-------

Enter the name of the sponsoring entity: Great	at Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
osition: Assistant Headmaster	Reports to: Headmaster
ob Duties: List up to 10 key duties this individual v	vill perform.
. Work closely with the Headmaster to apply the standa	ard policies and regulations of Great Hearts Academies
Make recommendations to the Headmaster regarding	the hiring, retention, development, and assignment of faculty and staff
. Organize and promote professional development oppo	ntunities for school personnel
Help coordinate annual and mid-year orientation activ	ities for faculty and students
Maintain a safe and orderly environment of the school	) through the establishment and maintenance of standards of conduct
Assist Headmaster in oversight and guidance of all dir	rect-report personnel, facilitating communication and interactions
Provide campus staff a structure for purchasing suppli	ies and matierals, as well as submitting weekly time sheets
Facilitate student, parent, and teacher annual surveys a	regarding program, operations, facilities, practices, discipline, commun
. Oversee required student testing and align with establi	ished targets, state standards, and best practices
10.	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



# REVISED DURING CONTINGENCY PROCESS. SEE INSERT.

Seventeenth Generation Open-Enrollment Charter Applicati	on
Supplemental Human Resources Information Form	
(MUST be typed)	

Enter the name of	f the sponsoring entity: Great	Hearts America - Texas		
Enter the name of	f the proposed charter school	ireat Hearts Academies - S	San Antonio	
sition: Head of Lowe	School	Reports to: Headmaster		
	Salary Range: \$50,000 -	580,000		
	onn of remuneration (i.e., car allo this position. In none, please sta		lips, travel or hous	ing allowance, etc)
	and the second state of th			
none				
none				
W1110	nd County): San Antonio, Be	ar County		
Proposed Location (City a		ar County In year five: 993		<u></u>
nono Proposed Location (City a Number of Students antic Minimum Qualification	pated in year one: 601			
Proposed Location (City a Number of Students antic Minimum Qualification	pated in year one 601		erred	
Proposed Location (City a Number of Students antici	pated in year one 601	In year five: 993	erred	
Proposed Location (City a Number of Students antic Ainimum Qualification	pated in year one 601	In year five: 993 ed, Advanced Degree Prei	erred	
Proposed Location (City a Number of Students antic Ainimum Qualification Education Required:	pated in year one: 601 s Required: Bachelor's Degree Requi	In year five: 993 ed, Advanced Degree Prei	erred	

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://mansfield.tea.state.tx.us/(LA\_V&UD) web ) on the Home, aspx. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (Ciry)	# of Studen Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000 - \$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000 - \$78,000
North East ISD	015910	San Antonio	66,604	\$62,000 - 82,000

Page 1 of 2



# APPROVED DURING CONTINGENCY PROCESS a Open-Enrollment Charter Application aman Resources Information Form (MUST be typed)

Enter the name of	f the sponsoring entity: Grea	t Hearts America - Texas
Enter the name of	f the proposed charter school:	Great Hearts Academies - San Antonio
Position: Head of Lower	School	Reports to: Headmaster
	Salary Range: \$60,000-	\$100,000
	rm of remuneration (i.e., car a this position. In none, please s	llowance, cell phone, memberships, travel or housing allowance, etc) to state N/A.
none		
	nd County); San Antonio, Be	xar County
Proposed Location (Clty a		xar County In year five: 993
none Proposed Location (City a Number of Students antici Minimum Qualifications	pated in year one: 601	
Proposed Location (City a Number of Students antici	pated in year one: 601	
Proposed Location (Clty a Number of Students antici Minimum Qualifications	pated in year one: 601	In year five: 993 ed, advanced degree preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <a href="http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx">http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</a>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000-\$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000-\$78,000
North East ISD	015910	San Antonio	66,604	\$62,000-\$82,000

	Enter the name of the sponsoring entity: Great	at Hearts America - Texas
	Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
Position	Head of Lower School	Reports to: Headmaster
b Duti	es: List up to 10 key duties this individual w	ill perform.
Provid	e leadership and administration for the lower sch	nool designed to maximize student growth and uchievement
Devek	op and administer lower school routine, coordina	ting all activities therein
Partici	pate in the selection of new teaching and staff pe	rsonnel
Provid	e the Headmaster with reports and regular update	es on the effectiveness of instructional practices
Observ	rc, counsel, and motivate professional staff toward	rd increased performance measures, including regular, ESL, and Speci
Provid	e campus level reports in a timely and accurate f	ashion to the Headmaster
Facilit	ate communication and interaction of fuculty, sta	ff, parents, and community members
Mainta	in a standard of student behavior designed to co	mmand respect and minimize school/classroom interruptions
Plan, c	onduct, or facilitate appropriate training and dev	elopment opportunities for faculty and staff

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



# REVISED DURING CONTINGENCY PROCESS. SEE INSERT.

### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

Enter the name o	f the sponsoring entity: Great Hearts America - Texas
Enter the name o	f the proposed charter school: Great Hearts Academies - San Antonio
Position: Regular Educa	ation Teacher Reports to: Headmaster/Head of Lower School
	Salary Range: \$30,000 - \$60,000
	orm of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc ) to this position. In none, please state N/A.
none	
Number of Students antici Minimum Qualification	s Required:
Education Required:	Bachelor's Required, Advanced Degree Preferred
Experience Required:	Teaching Experience Preterred
Certification Required:	none

districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Studen	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$40,000 - \$60,000
Northside ISD	015915	San Antonio	95,581	\$42,000 - \$62,000
North East ISD	015910	San Antonio	68,604	\$42,000 - \$62,000

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Page 1 of 2



# APPROVED DURING CONTINGENCY PROCESS

# (MUST be typed)

Enter the name of	of the sponsoring entity; Grea	t Hearts America - Texas
Enter the name of	of the proposed charter school:	Great Hearts Academies - San Antonio
osition: Reguiar Educat	tion Teacher	Reports to: Headmaster
	Salary Range: \$30,000-	\$60,000
	orm of remuneration (i.e., car a this position. In none, please s	llowance, cell phone, memberships, travel or housing allowance, etc) state N/A.
none		
Number of Students antic		xar County In year five: 993
Number of Students antic	ipated in year one: 601	
Proposed Location (City a Number of Students antic Minimum Qualification Education Required: Experience Required:	ipated in year one: 601	In year five: 993

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <u>http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</u>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$40,000-\$60,000
Northside iSD	015915	San Antonio	95,581	\$42,000-\$62,000
North East ISD	015910	San Antonio	66,604	\$42,000-\$62,000

	Enter the name of the sponsoring entity: Gre	at Hearts America - Texas
	Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
Position:	Regular Education Teacher	Reports to: Headmaster/Head of Lower School
ob Duti	ies: List up to 10 key duties this individual	will perform.
. Plan, j	prepare, and deliver instructional activities that	facilitate active learning experiences
Devel	op schemes of work and lesson plans aligned w	ith philosophy of Great Hearts Academies
. Establ	lish and communicate clear objectives for all lea	arning activities
, Provid	de differential learning experiences as appropria	tte to meet students' varying needs
. Partici	ipate in school and faculty meetings, including	professional development activities
Comm	nunicate regularly with school leadership and o	ther faculty to maximize instructional and organizational activities
Com	nunicate necessary information to students and	parents regarding student progress and student needs
. Enhan	ce classroom learning by closely following dev	elopments in subject area, teaching resources, and methods
Maint	ain clear and accurate records of student perform	mance, attendance, behavioral issues, and classroom events
_	······	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



# REVISED DURING CONTINGENCY PROCESS SEE INSERT

#### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

Enter the name of	the sponsoring entity: Great	at Hearts America - Texas
Enter the name of	The proposed charter school:	Great Hearts Academies - San Antonio
sition: Special Educa	tion Teacher	Reports to: Headmaster/Head of Lower School
	Salary Range: \$30,000	0 - \$60,000
	rm of remuneration (i.e., car a this position. In none, please s	Illowance, cell phone, memberships, mayel or housing allowance, etc) state N/A.
ne		
prosed Location (City a	nd County): San Antonio, B	levar County
chosen merenner (en) a	ind country), pearsoner of o	County
		In year five: 993
umber of Students antici	pated in year one: 601	
umber of Students antici linimum Qualifications	pated in year one: 601	
Rumber of Students antici Inimum Qualifications ducation Required:	pated in year one: 601	In year five: 993
lumber of Students antici linimum Qualifications	pated in year one: 601	In year five: 993
umber of Students antici inimum Qualifications ducation Required:	pated in year one: 601 Required: Bachelor's Required, Ac	In year five: 993
lumber of Students antici linimum Qualifications ducation Required:	pated in year one: 601 Required: Bachelor's Required, Ac	In year five: 993

the Texas Education Directory found at http://masticid.ica.state.ty.us/H.A.Ask/11D Westforms Home depy. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Studen	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$40,000 - \$60,000
Northside ISD	015915	San Antonio	95,581	\$42,000 - \$62,000
North East ISD	015910	San Antonio	66,604	\$42,000 - \$62.000

Page 1 of 2



# APPROVED DURING CONTINGENCY PROCESS

## pen-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

Enter the name o	f the sponsoring entity: Grea	t Hearts America - Texas
Enter the name o	f the proposed charter school:	Great Hearts Academies - San Antonio
osition: College Counse	elor	Reports to: Headmaster
	Salary Range: \$35,000-	\$50,000
	orm of remuneration (i.e., car a this position. In none, please s	llowance, cell phone, memberships, travel or housing allowance, etc) to state N/A.
none		
roposed Location (City a	nd County): Dallas, Dallas Co	
	pated in year one: 610	Dunty In year five: 993
roposed Location (City a Jumber of Students antici	pated in year one: 610 s Required:	
roposed Location (City a Jumber of Students antici Ainimum Qualifications	pated in year one: 610 s Required: Bachelor's degree require	In year five: 993

Name of District	CDN	Located in (City)	# of Student: Served	Salary Range
Dallas ISD	057905	Dallas	157,575	\$48,441-\$78,661
Fort Worth ISD	220905	Fort Worth	83,109	\$62,400-\$97,382
Arlington ISD	220901	Arlington	64,703	\$51,000-\$74,111

### APPROVED DURING CONTINGENCY PROCESS -Enrollment Charter Application esources Information Form (MUST be typed)

4

Enter the name of the sponsoring entity: Grea	t Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
osition: College Counselor	Reports to: Headmaster
b Duties: List up to 10 key duties this individe	ual will perform.
Developing college workshops for parents	
Providing individual parent counseling to answer	questions about high school curriculum, college acceptance, the application
One-on-one advising on college choices and optic	ons, students evaluate their interests for an initial selection of college major
One-on-one advising on college choices and optic Educating upperclassmen on application process	
Educating upperclassmen on application process	
Educating upperclassmen on application process Processing college application paperwork and wr	through required group workshops
Educating upperclassmen on application process Processing college application paperwork and wr	through required group workshops iting letters of recommendation for admissions or scholarships tools and hosting admissions reps; activity in NACAC
Educating upperclassmen on application process Processing college application paperwork and wr Networking with colleges, including travel to sch	through required group workshops iting letters of recommendation for admissions or scholarships cools and hosting admissions reps; activity in NACAC nships, and scholarship opportunities

10. Maintaining school-wide college test stats, college acceptance data, scholarship tracking, etc

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

# APPROVED DURING CONTINGENCY PROCESS pen-Enrollment Charter Application in Resources Information Form

1

Enter the name of	f the sponsoring entity: Grea	nt Hearts America - Texas
Enter the name of	f the proposed charter school:	Great Hearts Academies - San Antonio
osition: Special Education	on Teacher	Reports to: Headmaster/Head of Lower School
	Salary Range: \$30,000	\$60,000
	rm of remuneration (i.e., car a this position. In none, please	llowance, cell phone, memberships, travel or housing allowance, etc) to state N/A.
none		
Proposed Location (City a Number of Students antici Minimum Qualifications		In year five: 993
Number of Students antici	pated in year one: 601	
Number of Students antici Ainimum Qualifications	pated in year one: 601	In year five: 993 ed, advanced degree preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <a href="http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx">http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</a>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$40,000-\$60,000
Northside ISD	015915	San Antonio	95,581	\$42,000-\$62,000
North East ISD	015910	San Antonio	66,604	\$42,000-\$62,000

### APPROVED DURING CONTINGENCY PROCESS n Open-Enrollment Charter Application uman Resources Information Form (MUST be typed)

Enter the name of the sponsoring entry.	Great Hearts America - Texas
Enter the name of the proposed charter s	chool: Great Hearts Academies - San Antonio
sition: Special Education Teacher	Reports to: Headmaster/Head of Lower School
b Duties: List up to 10 key duties this in	ndividual will perform.
Provide educational services to special edu	ucation students
Prepare student education plans in consult	ation with parents and IEP guidelines
Develop schemes of work and lesson plan	s aligned with special education needs and the philosophy of Great Hearts
Design instruction, both individual and gro	oup, which parallels the general education curriculum
Participate in school and faculty meetings,	, including professional development activities
Monitor student progress, particpate in rev	view and revision of IEP, as appropriate
Assist other professional staff in diagnosis	of learning disorders, development of planned remediation, and student evaluation
	of learning disorders, development of planned remediation, and student evaluation

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

А	D DURING CONTINGENCY PROCESS	
APPROVE	D DURING CONTROL Supplemental Human Resources Information Form (MUST be typed)	
ANY areas left l	lank will result in the application being deemed "INCOMPLETE" during the review pro	
Enter the	name of the sponsoring entity: Great Hearts America - Texas	
Enter the	name of the proposed charter school: Great Hearts Academies - San Antonio	
Position: Registe	red Nurse Reports to: Director of Operations	
	Salary Range: \$20,000-\$35,000	
	ential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc) to be dual in this position. In none, please state N/A.	
none		
	(City and County): San Antonio, Bexar County ts anticipated in year one: 601 In year five: 993	
Minimum Qualit	ications Required:	
Education Require	d: Bachelor's degree required, advanced degree preferred	
Experience Requi	ed: 2-3 years clinical or school health services experience preferred	
Certification Requ	Registered Nurse In the state of Texas	
location. A tradition the Texas Education	wing using information gathered from three different traditional districts comparable in size, student make-up, and nal district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line throug n Directory found at <u>http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</u> . Additionally, tradition we an eight as the fourth digit in the county district number (CDN).	
	# of Students	

Name of District	CDN	Located in (City)	# of Student Served	s Salary Range
San Antonio ISD	015907	San Antonio	\$5,116	\$42,000-\$56,000
Northside iSD	015915	San Antonio	95,581	\$42,000-\$62,000
North East ISD	015910	San Antonio	66,604	\$42,000-\$62,000

# APPROVED DURING CONTINGENCY PROCESS Enrollment Charter Application esources Information Form

Enter the name of the sponsoring entity: Great	t Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
osition: Registered Nurse	Reports to: Director of Operations
ob Duties: List up to 10 key duties this individ	ual will perform.
. Addresses health needs of students, assisting in in	nplementing the school health program and providing appropriate care
Administers first aid and medications to students	according to district pollcy and procedures
. Assists and participates in the implementation of	the communicable disease program and mandates screenings
	the communicable disease program and mandates screenings garding health care needs and concerns of students
. Communicates with faculty, staff, and parents rep	
. Communicates with faculty, staff, and parents rep	garding health care needs and concerns of students
<ul> <li>Communicates with faculty, staff, and parents reported in the staff.</li> <li>Maintains and updates medical emergency cards</li> <li>Maintains health room and work areas for the the</li> </ul>	garding health care needs and concerns of students and health records as required for legal and professional standards
<ul> <li>Communicates with faculty, staff, and parents reported in the staff.</li> <li>Maintains and updates medical emergency cards</li> <li>Maintains health room and work areas for the the</li> <li>Records and reports incidents (e.g. fights, suspection)</li> </ul>	garding health care needs and concerns of students and health records as required for legal and professional standards purpose of providing adequate supplies and a safe, sanitary environment

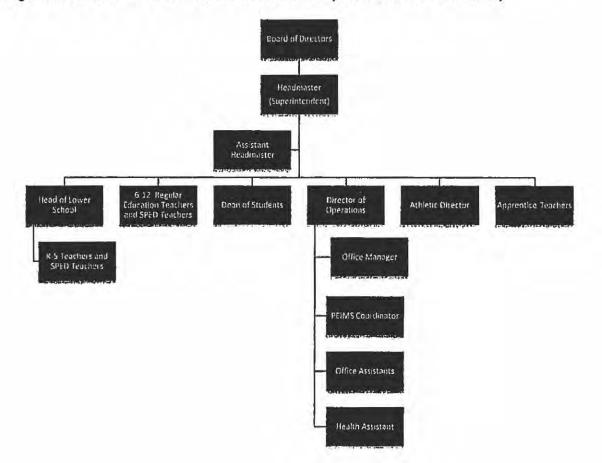
If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Human Resources Information (p. 145) – The Supplemental Human Resource Information Form submitted for the position of special education teacher notes "Cross Cat Sped" as the certification required. Confirm that any individual assigned to teach special education will be properly certified as required by state law."

Great hearts understands any individual assigned to teach special education will be properly certified as required by state law

APPROVED DURING CONTINGENCY PROCESS wide a Supplemental Human Resource Information which are listed on the organizational chart.

Organization Chart for To Scale K-12 in San Antonio (addition of SPED teachers)



Seventeen	th Generation Open-Enrollment Charter Application
Sup	plemental Human Resources Information Form
	(MUST he typed)

ter the name of the sponsoring entity:	Great Hearts America - Texas
Enter the name of the proposed charter so	hool: Great Hearts Academies - San Antonio

Reports to: Headmaster/Head of Lower School

Job Duties: List up to 10 key duties this individual will perform.

I. Provide educational services to special education students

2. Prepare student education plans in consultation with parents and IEP guidelines

3. Develop schemes of work and lesson plans aligned with special education needs and the philosophy of Great Hearts

4. Participate in school and faculty meetings, including professional development activities

5. Design instruction, both individual and group, which parallels the general education curriculum

6. Monitor student progress, participate in review and revision of IEP, as appropriate

7. Assist other professional staff in diagnosis of learning disorders, development of planned remediation, and student evaluation

8. Maintain appropriate student data and other records and submit reports as required

9. Communicate necessary information to parents and students regarding student progress and student needs

10. Articulate curriculum between and among student levels

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



Human Resources Information (p. 146) – Confirm your understanding that the Admission Review and Dismissal (ARD) committee is the entity that develops and implements the Individualized Education Plan (IEP) to meet the needs of each student.

Great Hearts understands that the Admission Review and Dismissal (ARD) committee is the entity that develops and implements the Individualized Education Plan (IEP) to meet the needs of each student.

APPROVED DURING CONTINGENCY PROCESS

# REVISED DURING CONTINGENCY PROCESS. SEE INSERT.

Seventeenth Generation Open-Enrollment Charter Ap	plication
Supplemental Human Resources Information Fo	rm
(MUST be typed)	

Enter the name of	Tthe sponsoring entity: Grea	at Hearts America - Texas
Enter the name of	the proposed charter school:	Great Hearts Academies - San Antonio
osition: Dean of Stude	nts	Reports to: Headmaster
	Salary Range: \$50,000	0 - \$80,000
	rm of remuneration (i.e., car a this position. In none, please :	state N/A.
none		
	nd County): San Antonio, B	lexar County
Proposed Location (City a	nd County): San Antonio, B	
		lexar County
Proposed Location (City a	pated in year one: 601	in year five: 993
Proposed Location (City a	pated in year one: 601	
Proposed Location (City a Number of Students antici Ainimum Qualifications	pated in year one: 601	in year five: 993
Proposed Location (City a Number of Students antici Ainimum Qualifications Education Required:	pated in year one: 601	uired, Advanced Degree Preferred
Proposed Location (City a Number of Students antici Ainimum Qualifications	pated in year one: 601 s Required: Bachelor's Degree Req	uired, Advanced Degree Preferred
Proposed Location (City a Number of Students antici Ainimum Qualifications Education Required:	pated in year one: 601 s Required: Bachelor's Degree Req	uired, Advanced Degree Preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://mansfield.tea.state.tv.us/U/ $\chi$ /sk1110/Web1orms/Home aspy. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District San Antonio ISD	CDN 015907	Located in (City) San Antonio	# of Studen Served 55,116	Salary Range \$55,000 - \$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000 - \$78,000
North East ISD	015910	San Antonio	66,604	\$62,000 - 82,000

Page 1 of 2



MUQUINIBIR I	
APPROVED DURING	CONTINGENCY PROCESS i Resources Information Form JST be typed)
NY areas left blank	will result in the application being deemed "INCOMPLETE" during the review proc
Enter the name of	of the sponsoring entity: Great Hearts America - Texas
Enter the name of	of the proposed charter school: Great Hearts Academies - San Antonio
Position: Dean of Stude	ents Reports to: Headmaster
	Salary Range: \$50,000-\$80,000
	form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc) to be a this position. In none, please state N/A.
Proposed Location (City	and County): San Antonio, Bexar County
Number of Students antic	cipated in year one: 601 In year five: 993
Minimum Qualification	1s Required:
Education Required:	Bachelor's degree required, advanced degree preferred
Experience Required:	teaching experience preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <u>http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</u>. Additionally, traditional districts wlll not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000-\$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000-\$78,000
North East ISD	015910	San Antonio	66,604	\$62,000-\$82,000

ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process.

Enter the name of the sponsoring entity: Great	at Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
Position: Dean of Students	Reports to: Headmaster
ob Duties: List up to 10 key duties this individual v	vill perform.
Manages student supervision issues and enforces scho	ol behavioral expectations
Counsels students and parents about all school, distric	1, and state policies
Works with staff and parents to develop student behav	ioral expectations
. Facilitates annual student satisfaction surveys and com	municates results to Headmaster and Board of Directors
Serves as a resource to faculty in dealing with classroo	om management issues regarding student behavior
Assists in the planning, developing, and implementing	of individual student behavior plans
Develops programs to promote positive student behav	ior as well as intervention strategies
Maintains records and provides required campus level	reports to Headmaster
Confers appropriate consequences for behavior include	ing detention, in school suspension, and out-of-school suspension
0. Provides or designates providers for oversight of extra	ra-curricular and athletic events

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



REVISED DURING CONTINGENCY PROCESS.

	of the sponsoring entity: Great Hearts America - Texas
Enter the name of	of the proposed charter school: Great Hearts Academies - San Antonio
Position: Director of Op	Perations Reports to: Headmaster
	Salary Range: \$50,000 - \$80,000
	form of remuteration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc) to have this position. In none, please state $N/\Lambda$ .
none	
·	
Proposed Location (City	and County): San Antonio, Bexar County
Number of Students antic	tipated in year one: 601 In year five: 993
Minimum Qualification	ns Required:
Education Required:	Bachelor's Degree Required, Advanced Degree Preferred
Experience Required:	Teaching experience preterred
Experience Required:	Teaching experience preferred

location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://mansfield.tea.state.tx/us/11:A/Ask11.D/Web Forms Home.aspx, Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Studen Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000 - \$75,000
Nonthside ISD	015915	San Antonio	95,581	\$60,000 - \$78,000
North East ISD	015910	San Antonio	66,604	\$62,000 - 82,000

Page 1 of 2



### APPROVED DURING CONTINGENCY PROCESS Man Resources Information Form (MUST be typed)

Enter the name of	the sponsoring entity: Grea	t Hearts America - Texas
Enter the name of	the proposed charter school:	Great Hearts Academies - San Antonio
Position: Director of Ope	rations	Reports to: Headmaster
	Salary Range: \$50,000-	\$80,000
	rm of remuneration (i.e., car a this position. In none, please s	llowance, cell phone, memberships, travel or housing allowance, etc) to be state N/A.
none		
Proposed Location (City a	nd County): San Antonio, Be	xar County
		In year five: 993
Number of Students antici	pated in year one: 601	
Proposed Location (City a Number of Students antici Minimum Qualifications Education Required:	pated in year one: 601	
Number of Students antici	pated in year one: 601	In year five: 993

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <a href="http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx">http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</a>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000-\$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000-\$78,000
North East ISD	015910	San Antonio	66,604	\$62,000-\$82,000

Enter the name of the sponsoring entity: Great	at Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
Position: Director of Operations	Reports to: Headmaster
ob Duties: List up to 10 key duties this individual w	vill perform.
I. Manage maimenance, custodial, grounds, food service	, supply and transportation activities for efficiency and compliance
2. Ensure all activities conform to district, state, and fede	ral guidelines where applicable
3. Prepare and submit accurate attendance data and repor	t results bi-annually to the Headmaster
A. Communicate effectively with all members of the sche	sol district and community
5. Assist in budget development and budget monitoring a	und control procedures
5. Utilize, maintain, and prepare financial documents acc	arately and ethically
7. Assume responsibility for all charter school reports and	l external audits
3.	
9, ]	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



Enter the name of	of the sponsoring entity: Great Hearts America - Texas	
Enter the name of	of the proposed charter school: Great Hearts Academies - San Antonio	
Position; K-5 Teacher	Reports to: Head of Lower School	
	Salary Range: \$30,000 - \$60,000	
	orm of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, el this position. In none, please state N/A.	lc) to t
	i den posticit. Il fond production and	
		- 44
		- 41
none		
Proposed Location (City a	and County): San Antonio, Bexar County	- 31
Proposed Location (City a	and County): San Antonio, Bexar County	
none	and County): San Antonio, Bexar County ipated in year one: 601 In year five: 993	- 41
Proposed Location (City an Number of Students anticip	and County): San Antonio, Bexar County ipated in year one: 601 In year five: 993	
Proposed Location (City an Number of Students anticip Minimum Qualifications	and County): San Antonio, Bexar County ipated in year one: 601 In year five: 993 In Required:	- 41
Proposed Location (City an Number of Students anticip Minimum Qualifications	and County): San Antonio, Bexar County ipated in year one: 601 In year five: 993 In Sequired: Bacehleor's required, Advanced Degree Preferred	
Proposed Location (City an Number of Students anticip Minimum Qualifications Education Required:	and County): San Antonio, Bexar County ipated in year one: 601 In year five: 993 In Required:	
Proposed Location (City an Number of Students anticip Minimum Qualifications	and County): San Antonio, Bexar County ipated in year one: 601 In year five: 993 In Sequired: Bacehleor's required, Advanced Degree Preferred	
Proposed Location (City an Number of Students anticip Minimum Qualifications Education Required:	and County): San Antonio, Bexar County ipated in year one: 601 In year five: 993 In Sequired: Bacehleor's required, Advanced Degree Preferred	

different traditional districts comparable in size, student make-up, and ng mg 19 location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://anastickl.tea.state.ty.ps/11/A/Ast/TFD/Web Forms Home aspy, Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Studen Served	s Salary Range
San Antonio ISD	015901	San Antonio	55,116	\$40,000 - \$60,000
Northside ISD	015915	San Antonio	95,581	\$42,000 - 62,000
North East ISD	015910	San Antonio	66,604	\$42,000 - 62,000

Page 1 of 2



ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process,

Enter the name of the sponsoring entity:	Great Hearts America - Texas
Enter the name of the proposed charter s	choot: Great Hearts Academies - San Antonio
Position: K-5 Teacher	Reports to: Head of Lower School
ob Duties: List up to 10 key duties this indiv	idual will perform.
Plan, prepare, and deliver instructional activitie	es that facilitate active learning experiences
2. Develop schemes of work and lesson plans alig	gned with philosphy of Great Hearts Academics
B. Establish and communicate clear objectives for	r all learning activities
Establishes and maintains standards of student	behavior needed to achieve a functional learning atmosphere
. Communicates with parents through conference	es and other means to discuss students' progress and interpret school program
. Participate in school and faculty meetings, incl	luding professional development opportunities
Creates an effective environment for learning t	brough functional and attractive displays, bulletin boards, and interest centers
Enhance classroom learning by closely followi	ing developments in subject areas, teaching resources, and methods
E	h, keeps appropriate records, and prepares progress reports

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



# REVISED DURING CONTINGENCY PROCESS. SEE INSERT.

		(MUST be typed)	1
Y areas left blank wil	l result in the applicat	tion being deemed "INCOMPLETE" during the review pro-	cess.
Enter the name of th	te sponsoring entity: Great	it Hearts America - Texas	
Enter the name of the	ne proposed charter school:	Great Hearts Academies - San Antonio	
osition: Athletic Director		Reports to: Headmaster	
	Salary Range: \$50,000	- \$80,000	/
List any other potential form given to the individual in thi		llowance, cell plione, memberships, travel or housing allowance, etc) to be tate N/A.	/
none			10
troposed Location (City and	County): San Antonio, Be	exar County	ļ
		exar County	
lumber of Students anticipat	ted in year one: 601	In year five: 993	
Proposed Location (City and Number of Students anticipat Ainimum Qualifications R Education Required:	ted in year one: 601		
Number of Students anticipat Ainimum Qualifications R	ted in year one: 601	In year five: 993	
Number of Students anticipat Ainimum Qualifications R	ted in year one: 601	In year five: 093	
Yumber of Students anticipat Ainimum Qualifications R Education Required:	ted in year one: 601 (equired: Bachelor's Degree Requ	In year five: 093	
Yumber of Students anticipat Ainimum Qualifications R Education Required: Experience Required:	ted in year one: 601 (equired: Bachelor's Degree Requ	In year five: 093	
Yumber of Students anticipat Ainimum Qualifications R Education Required:	ted in year one: 601 Required: Bachelor's Degree Requ Teaching experience pro	In year five: 093	

Name of District	CDN	Located in (City)	# of Studen Served	Is Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000 - \$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000 - \$78,000
North East ISD	015910	San Antonio	66,604	\$62,000 - 62,000

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MILOUI	inen i				
PROVED	DURING CONT	INGENCY PROCESS		rollment Charter Application urces Information Form typed)	
NY area	s left blank w	ill result in the applica	tion being o	deemed "INCOMPLETE" during the review p	ro
F	Inter the name of	the sponsoring entity: Gre	at Hearts Ame	rica - Texas	
E	Inter the name of	the proposed charter school	Great Heart	s Academies - San Antonio	
Position:	Athletic Director		Reports to:	Headmaster	
		Salary Range: \$50,000	)-\$80,000		
given to t none Proposed	he individual in the individual in the individual in the second s	m of remuneration (i.e., car his position. In none, please d County): San Antonio, B ated in year one: 601	exar County	phone, memberships, travel or housing allowance, etc) t year five: 993	
Minimun	o Qualifications	Required:			
Education	Required:	Bachelor's degree requi	red, advanced	degree preferred	
Experience	e Required:	teaching experience pro	eferred		
Certificat	ion Required:	none			
location. A	A traditional distri Education Direct	ict is identified by the abbrev	vlation ISD or (	nt traditional districts comparable in size, student make-up, CISD. County district numbors may be accessed on line th /TEA.AskTED.Web/Forms/Home.aspx. Additionally, tradi	roug

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$55,000-\$75,000
Northside ISD	015915	San Antonio	95,581	\$60,000-\$78,000
North East ISD	015910	San Antonio	66,604	\$62,000-\$82,000

	Great Hearts America - Texas
Enter the name of the proposed charter	school: Great Hearts Academies - San Antonio
osition: Athletic Director	Reports to: Headmaster
ob Duties: List up to 10 key duties this indi	vidual will perform.
Provide management and oversight of all scho	onl-related athletic programs
Hire, supervise, and coordinate coaches and a	thletic staff
Schedule all competition for intervarsity team	s with consideration given to travel time, academic calendar, and competition
Verify that all athletes are medically cleared, I	nave insurance, have been released by parents, and have signed conduct form
. Communicate with Headmaster regarding tea	n needs, team funding, and related concerns
	le to compete and annuide remediation where appropriate
5. Verify that all athletes are academically eligib	a a compre and provide remediation where appropriate
	ed to athletics. Respond promptly to staff concerns and e-mails
7. Respond to all parent concerns and calls relate	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

Page 2 of 2



# REVISED DURING CONTINGENCY PROCESS SEE INSERT

### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process.

Enter the name of	f the proposed charter school: Great Hearts Academies - San Antonio
Position: Assistant Teac	ther/Teacher Apprentice Reports to: Headmaster
	Salary Range: \$20,000 - \$30,000
	orm of remuncration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc) to be this position. In nonc, please state N/A.
V	and periods and a second se
none	
	and County): San Antonio, Bexar County
Proposed Location (City a	
Proposed Location (City a Number of Students antici	ipated in year one: 601 In year five: 993
Proposed Location (City a Number of Students antici Minimum Qualifications	ipated in year one: 601 In year five: 993
none Proposed Location (City a Number of Students antici Minimum Qualifications Education Required:	s Required:
Proposed Location (City a Number of Students antici Minimum Qualifications	s Required:
Proposed Location (City a Number of Students antici Minimum Qualifications Education Required:	pated in year one: 601 In year five: 993 s Required: Bachelor's Degree Required, Advanced Degree Preferred

location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://manstield/teastate.tx/us/11/A\_Ask(11) Web Lorms Home aspx. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Student Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$15,000 - \$25,000
Northside ISD	015915	San Antonio	95,581	\$15,000 - \$25,000
North East ISD	015910	San Antonio	66,604	\$15,000 - \$25,000

Page 1 of 2



# APPROVED DURING CONTINGENCY PROCESS Resources Information Form (WUST be typed)

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ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process. Enter the name of the sponsoring entity: Great Hearts America - Texas Enter the name of the proposed charter school: Great Hearts Academies - San Antonio Position: Assistant Teacher Reports to: Headmaster Salary Range: \$20,000-\$30,000 List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc ... ) to be given to the individual in this position. In none, please state N/A. none Proposed Location (City and County): San Antonio, Bexar County In year five: 993 Number of Students anticipated in year one: 601 Minimum Qualifications Required: Bachelor's degree required, advanced degree preferred **Education Required: Experience** Required: none Certification Required: none

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <a href="http://mansfield.tca.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx">http://mansfield.tca.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</a>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$15,000-\$25,000
Northside ISD	015915	San Antonio	95,581	\$15,000-\$25,000
North East ISD	015910	San Antonio	66,604	\$15,000-\$25,000

ANY areas left blank will result in the	application being deemed	"INCOMPLETE"	during the revie	w process
---	--------------------------	--------------	------------------	-----------

Enter the name of the sponsoring entity: Great	at Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
Position: Assistant Teacher/Teacher Apprentice	Reports to: Headmaster
lob Duties: List up to 10 key duties this individual w	vill perform.
I. Assists the teacher in all classroom and student-related	activities to enhance learning and developmental growth
2. Plans with and assists the teacher in preparing material	is and supplies in advance for activities
3. Shares in the development and implementation of lesse	on plans with the teacher
4. Attends all training opportunities and staff meetings	
5. Observes children to detect signs of illness, injury, emo	otional distress, learning disorder, or other needs and reports to teacher
5. Assists teacher in maintaining classroom order and stru	ucture
7. Assists in classroom management and organization through	ough record keeping, file maintenance, and parental communications
8. Assumes the teacher's role, when teacher's absence is r	equired, assisting substitute or temporary personnell as needed
9.	
10	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

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		ation being deemed "INCOMPLETE" during the review pr
Enter the name	of the sponsoring entity: Gre	eat Hearts America - Texas
Enter the name	of the proposed charter school	: Great Hearts Academies - San Antonio
osition: Office Manag	ger	Reports to: Director of Operations
	Salary Range: \$30,00	00 - \$50,000
ione		
roposed Location (City	and County): San Antonio, I	Bexar County
		Bexar County In year live: 993
lumber of Students anti	cipated in year one: 601	
Proposed Location (City Aumber of Students anti Ainimum Qualificatio Aucation Required:	cipated in year one: 601	
umber of Students anti linimum Qualificatio	cipated in year one: 601	in year live: 993

location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://paasticld/tea.state.tv/us/11/4/jsk11/D/web4ords/thome.aspx. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$35,000 - \$55,000
Northside ISD	015915	San Antonio	95,581	\$35,000 - \$55,000
North East ISD	015910	San Antonio	66,604	\$35,000 - \$55,000

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SAS 536-12 RFA 701-11-108 REVISED DURING CONTINGENCY PROCESS



### APPROVED DURING CONTINGENCY PROCESS en-Enrollment Charter Application Suppremental ruman Resources Information Form (MUST be typed)

ų,

En	ter the name of	the sponsoring entity: Gre	eat Hearts America - Texas
En	ter the name of	the proposed charter school	: Great Hearts Academies - San Antonio
osition:	Office Manager		Reports to: Director of Operations
		Salary Range: \$30,00	0-\$50,000
		nn of remuneration (l.e., car his position. In none, please	allowance, cell phone, memberships, travel or housing allowance, etc. e state N/A.
			and the second
one			
one			
	ocation (City ar	nd County): San Antonio, E	lexar County
roposed L		nd County): San Antonio, E pated in year one: 601	lexar County
roposed L lumber of		pated in year one: 601	
roposed L lumber of linimum	Students anticip Qualifications	pated in year one: 601	In year five: 993
lumber of	Students anticip Qualifications	nated in year one: 601 Required:	In year five: 993
roposed L lumber of linimum ducation l	Students anticip Qualifications	nated in year one: 601 Required:	In year five: 993

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Toxas Education Directory found at <a href="http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx">http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</a>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$35,000-\$55,000
Northside ISD	015915	San Antonio	95,581	\$35,000-\$55,000
North East ISD	015910	San Antonio	66,604	\$35,000-\$55,000

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Enter the name of the sponsoring entity: Gre	sat Hearts America - Texas
Enter the name of the proposed charter school	Great Hearts Academies - San Antonio
Position: Office Manager	Reports to: Director of Operations
ob Duties: List up to 10 key duties this individual	will perform.
Manages the operation of the school office. Greets p	arents, students, and visitors entering the office and provides assistanc
Maintains professional office standards while answer	ing phones, screening calls, and handling mail
Provides secretarial assistance to the Headmaster and	other administrators, as assigned
Maintains records and files for staff and student infor	mation
Arranges for assignment and release of substitute per-	sonnel: greets and directs substitutes as required
Requisitions, receives, accounts for, and distributes so	chool supplies and materials
Maintains school office files in an organized and cont	îldential manner
Acts us first contact point for visitors, phone contacts	and the general public, serving as liaison to necessary contact person

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

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I.D.L.L.

REVISED DURING CONTINGENCY PROCESS. SEE INSERT.

Seventeenth Generation Open-En.

Supplemental Human Resources Information .... (MUST be typed) ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process. Enter the name of the sponsoring entity: Great Hearts America - Texas Great Hearts Academies - San Antonio Enter the name of the proposed charter school: Position: PEIMS Coordinator Reports to: Director of Operations \$25,000 - \$40,000 Salary Range: List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. In none, please state N/A. none Proposed Location (City and County): San Antonio, Bexar County Number of Students anticipated in year one: 601 In year five: 993 Minimum Qualifications Required: **Bachelor's Preferred** Education Required: none Experience Required: none Certification Required: Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://mansfield.tea.state.ty.os/11/0.Ask/11.D.Web/Founty-Home aspy, Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN). # of Students

Name of District	CDN	Located in (City)	Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$22,000 - \$38,000
Northside ISD	015915	San Antonio	95,581	\$19,000 - \$38,000
North East ISD	015910	San Antonio	66,604	\$21,000 - \$37,000

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ROVED DURING CONTINGENCY PROCESS	n Open-Enrollment Charter Application aman Resources Information Form (MUST be typed)
WY areas left blank will result in the applic	ation being deemed "INCOMPLETE" during the review pr
Enter the name of the sponsoring entity: Greater the sponsoring entity of the sponsoring entity	eat Hearts America - Texas
Enter the name of the proposed charter school	: Great Hearts Academies - San Antonio
Position: PEIMS Coordinator	Reports to: Director of Operations
Salary Range: \$25,00	0-\$40,000
ist any other potential form of remuneration (i.e., car given to the individual in this position. In none, please	allowance, cell phone, memberships, travel or housing allowance, etc) to e state N/A.
none	
roposed Location (City and County): San Antonio, I	Bexar County
Number of Students anticipated in year one: 601	In year five: 993
Ainimum Qualifications Required:	

Experience Required:	teaching experience preferred
Certification Required:	none

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <u>http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</u>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Studen Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$22,000-\$38,000
Northside ISD	015915	San Antonio	95,581	\$19,000-\$38,000
North East ISD	015910	San Antonio	66,604	\$21,000-\$37,000

### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

	Enter the name of the sponsoring entity: Great	Hearts America - Texas
	Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
osition	PEIMS Coordinator	Reports to: Director of Operations
ob Duti	es: List up to 10 key duties this individual wil	ll perform.
. Mana	ge the collection, incorporation, and formation of a	Il data required for PEIMS submission
. Collat	wrate with school, office manager, and others to co	ollect, organize and format date required for timely PEIMS reports
. Provid	le accurate information through editing, reports, an	nd verification of data
. Prepa	e and submit by computer complete PEIMS data i	n TEA prescribed format to education service center for processing
. Valida	te date submitted to TEA and submit corrections in	n a timely manner
i. Ensur	e charter staff training and support for processing F	PEIMS data
	e and distribute PEIMS-related information for ES	SC and TEA, including updates to PEIMS Data Standards
Receiv		and a second
_	te and record results according to charter guideline	15

10. Ensure appropriate staff receives edits and reports for analysis, verification, and corrections

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

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### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process.

Enter the name o	f the proposed charter school:	Great Hearts Academies - San Anton	Ю
Position: Office Assistar	t	Reports to: Director of Operations	
	Salary Range: \$20,00	0 - \$30,000	
	rm of remuneration (i.e., car a this position. In none, please	allowance, cell phone, memberships, travel state N/A.	or housing allowance, etc ) t
none			
Proposed Location (City a	nd County); San Antonio, E	Bexar County	
Proposed Location (City a Number of Students antici Minimum Qualifications	Required:	In year five: 993	
Number of Students antici	pated in year one: 601	In year five: 993	DNTINGENCY PROC
Number of Students antici Minimum Qualifications	pated in year one: 601 Required:		DNTINGENCY PROC

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at http://manstield.tea.state.tx.us/IEAAskIED/WebFormts/Home/aspx, Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$20,000 - \$32,000
Northside ISD	015915	San Antonio	95,581	\$19,000 - \$30,000
North East ISD	015910	San Antonio	66,604	\$20,000 - \$32,000

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## APPROVED DURING CONTINGENCY PROCESS Open-Enrollment Charter Application man Resources Information Form (MUST be typed)

Enter the name o	of the sponsoring entity: Great Hearts America - Texas
Enter the name o	of the proposed charter school: Great Hearts Academies - San Antonio
osition: Office Assistant	Reports to: Director of Operations
	Salary Range: \$20,000-\$30,000
	form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc a this position. In none, please state N/A.
one	
roposed Location (City a	and County): San Antonio, Bexar County
Number of Students antici Ainimum Qualifications Education Required:	
finimum Qualification	ns Required:

Complete the following using Information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <u>http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx</u>. Additionally, traditional districts will not have an eight as the fourth digit in the county district number (CDN).

Name of District	CDN	Located in (City)	# of Student	s Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$20,000-\$32,000
Northside ISD	015915	San Antonio	95,581	\$19,000-\$30,000
North East ISD	015910	San Antonio	66,604	\$20,000-\$32,000

### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review process.

Enter the name of the sponsoring entity: Great	at Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
Position: Office Assistant	Reports to: Director of Operations
nb Duties: List up to 10 key duties this individual w	ill perform.
I. Supports full range of office activities as directed by of	Mice manager
2. Distributes mail, checks, supplies, messages, etc. for th	e purpose of disseminating materials to appropriate parties
. Coordinates the maintenance and/or repair of office equ	uipment for the purpose of ensuring good working order
. Monitors students referred to office for illness, disciplin	ne. etc. for the purpose of ensuring their safety and welfare
Orients new personnel, students, and substitutes to effe	ctively assimilate them into site operations
. Performs record keeping and clerical functions for the p	purpose of supporting office manager and other designated personnel
Responds to inquiries of students, stuff, other education	nal institutions and/or the public, providing information and direction
Maintains a variety of files, documents, and records to	document and provide reliable information relative to student records
Attends meetings, as requested, to receive and/or conve	ey information
0.	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

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### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

	of the sponsoring entity: Great Hearts America - Texas
Enter the name of	of the proposed charter school: Great Hearts Academies - San Antonio
Position: Health Assistan	Int Reports to: Director of Operations
List any other potential fo	Salary Range: \$20,000 - \$35,000
given to the individual in t	this position. In none, please state N/A.
none	
Number of Students antici Minimum Qualifications Education Required:	
,	Previous experience preferred
Experience Required.	
xperience Required:	
Experience Required: Certification Required:	none

Name of District	CDN	Located in (City)	Served	Salacy Range
San Antonio ISD	015907	San Antonio	55,116	\$42,080 - \$56,000
Northside 190	015915	San Antonio	95,581	\$40,000 - \$55,000
North East ISD	015910	San Antonio	66,604	\$44,000 - \$60,000

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REVISED DURING CONTINGENCY PROCESS. SEE INSERT.



## Attachment I

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### Eighteenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

Enter the name o	f the sponsoring entity: Grea	t Hearts America - Texas
Enter the name o	f the proposed charter school:	Great Hearts Academies - San Antonio
osition: Health Assistan	it	Reports to: Director of Operations
	Salary Range: \$20,000-	\$35,000
	orm of remuneration (i.e., car al this position. In none, please s	llowance, cell phone, memberships, travel or housing allowance, etc) t state N/A.
none		
	nd County): San Antonio, Be	xar county
Number of Students antici	pated in year one: 601	In year five: 993
Number of Students antici Minimum Qualifications Education Required:	pated in year one: 601	
Number of Students antici Minimum Qualifications	pated in year one: 601 s Required: Bachelor's degree require	In year five: 993

Name of District	CDN	Located In (City)	# of Students Served	Salary Range
San Antonio ISD	015907	San Antonio	55,116	\$42,000-\$56,000
Northside (SD	015915	San Antonio	95,581	\$40,000-\$55,000
North East ISD	015910	San Antonio	66,604	\$44,000-\$60,000

### Seventeenth Generation Open-Enrollment Charter Application Supplemental Human Resources Information Form (MUST be typed)

ANY areas left blank will result in the application being deemed "INCOMPLETE" during the review p
---

Enter the name of the sponsoring entity: Great	at Hearts America - Texas
Enter the name of the proposed charter school:	Great Hearts Academies - San Antonio
Position: Health Assistant	Reports to: Director of Operations
ob Duties: List up to 10 key duties this individual v	vill perform.
. Addresses health needs of students, assisting in impler	menting the school health program and providing appropriate care
2. Adminsters first aid and medications to students accor	ding to district policy and procedures
. Assists and participates in the implementation of the c	ommunicable disease program and mandated screenings
Communicates with faculty, staff, and parents regarding	ng health care needs and concerns of students
Maintains and updates medical emergency cards and h	aealth records as required for legal and professional standards
Maintains health room and work areas for the purpose	of prodiving adequate supplies and a safe, sanitary environment
Records and reports incidents (e.g. fights, suspected ch	nild abuse, etc.) for the purpose of maintaing the safety of students
Provides care and reports incidents while adhering to a	applicable laws, school policies, and professional procedures
Supervises students referred for illness and/or injury a	nd communicates with parents, guardians, and school leaders as needed
0.	

If a charter is awarded, this document becomes part of the original application. Changes to this information must be documented in the minutes of an open meeting of the charter holder board.

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# ATTACHMENT J GREAT HEARTS AMERICA – TEXAS

AUDIT REPORT



### ATTACHMENT J – GREAT HEARTS ACADEMIES – SAN ANTONIO

February 19, 2012

Ward Huseth Great Hearts America Texas c/o Great Hearts Academies, Inc. 3102 N. 56<sup>th</sup> Street Suite 300 Phoenix, AZ 85018

To Whom It May Concern:

This statement serves to acknowledge that no documents are being provided by Great Hearts America – Texas because the sponsoring entity was incorporated after January 1, 2010, in February of 2012, and has less than \$5,000 in receipts.

Sincerely, 2h 5

Ward Huseth Chief Financial Officer Great Hearts America - Texas



# ATTACHMENT K GREAT HEARTS AMERICA – TEXAS

# CREDIT REPORT



### ATTACHMENT K - GREAT HEARTS ACADEMIES - SAN ANTONIO

February 19, 2012

Ward Huseth Great Hearts America Texas c/o Great Hearts Academies, Inc. 3102 N. 56<sup>th</sup> Street Suite 300 Phoenix, AZ 85018

To Whom It May Concern:

This statement serves to acknowledge that no credit report is being provided because the sponsoring entity, Great Hearts America – Texas, was incorporated after January 1, 2010, in February of 2012, and has less than \$5,000 in receipts.

Sincerely, A pr

Ward Huseth Chief Financial Officer Great Hearts America - Texas



# ATTACHMENT L GREAT HEARTS AMERICA – TEXAS

**IRS 990 FILING** 



### ATTACHMENT L - GREAT HEARTS ACADEMIES - SAN ANTONIO

February 19, 2012

Ward Huseth Great Hearts America Texas c/o Great Hearts Academies, Inc. 3102 N. 56<sup>th</sup> Street Suite 300 Phoenix, AZ 85018

To Whom It May Concern:

This statement serves to acknowledge that no (IRS) Form 990 is being provided because the sponsoring entity, Great Hearts America – Texas, was incorporated after January 1, 2010, in February of 2012, and as such has not filed any 990 forms to date.

Sincerely,

Ward Huseth Chief Financial Officer Great Hearts America - Texas



# ATTACHMENT M GREAT HEARTS AMERICA – TEXAS

DOCUMENTATION VERIFYING ALL SOURCES OF FUNDING



### THE EWING HALSELL FOUNDATION 711 Navarro - Suite 737 San Antonio, Texas 78205-1735 (210) 223-2640 (210) 271-9089 Fax

February 20, 2012

Dr. Daniel Scoggin, Chief Executive Officer Dr. Peter Bezanson, Chief Academic Officer Great Hearts Academies 3102 N 56th Street, Suite 300 Phoenix, AZ 85018

Dear Dan and Peter:

1

This letter serves as evidence that the Ewing Halsell Foundation's Board of Directors ("the Board") visited two (2) Great Hearts schools on February 13, 2012 and is considering a grant toward Great Hearts Academies proposed expansion of its public charter school model in San Antonio, Texas. The Board will continue to follow Great Hearts' status in obtaining a Texas charter and in reviewing your business plan to expand and grow in San Antonio, Texas.

Please let me know if you have any questions. Thank you!

Best regards,

Foundation Manager



GEORGE W. BRACKENRIDGE FOUNDATION 119 Taylor Street San Antonio, Texas 78205

> TEL (210) 223-6075 · FAX (210) 226-1715 WWW.BRACKENRIDGEFOUNDATION.ORG

> > TRUSTEES VICTORIA B. RICO - CHAIRMAN RANDY J. BOATRIGHT STEPHANIE SHEARER

February 20, 2011

Dr. Peter Bezanson, President Great Hearts America—Texas 3102 N. 56<sup>th</sup> Street, Suite 300 Phoenix, AZ 85018

Dear Dr. Bezanson:

173 GreatHearts

On behalf of the George W. Brackenridge Foundation, I am delighted to offer Great Hearts America—Texas a conditional multi-year grant commitment of \$1,000,000 over the next eight years. This grant is conditioned initially upon Great Hearts America— Texas obtaining a Texas charter and committing to open a charter school campus in San Antonio by Fall 2013. Distribution of grant funds would begin with \$125,000 in January of 2013 with subsequent distributions to be set by mutual consent but in no case less that \$100,000 per year until the total of \$1,000,000 is reached, so long as performance and growth metrics are met, grant restrictions are observed, and the asset value of the foundation does not drop by more than 30%.

The boards of Great Hearts America—Texas and the George W. Brackenridge Foundation will determine appropriate performance and growth metrics by mutual consent, possibly referencing the metrics established by the Charter School Growth Fund, if any, for Great Hearts America—Texas's San Antonio expansion.

The relevant grant restrictions are (1) Great Hearts America—Texas must maintain its 501c3 status and (2) funds may not be used for any political campaign purposes, to carry on propaganda or otherwise attempt to influence in any manner legislation of any governmental body, to influence the outcome of any public election, to carry on directly or indirectly, any voter registration drive, or to make any payment or use of Grant funds for any purpose other than charitable purposes described in Code section 170 (c)(2)(B).

It would be hard to overstate our excitement about the potential for Great Hearts America—Texas to build classical education schools in San Antonio. Since your parent information meeting, the Brackenridge trustees have been overwhelmed with emails and phone calls from parents and even a few other potential funders asking whether you are really coming. We have our fingers crossed that you are and stand ready to assist in any way we can.

Sincerely,

lin FLI.

Victoria B. Rico Chairman & Trustee

VBR/km

cc: Randy J. Boatright, Trustee Stephanie Shearer, Trustee Emily Thuss, Grant Consultant



ATTACHMENT N GREAT HEARTS AMERICA – TEXAS

START UP BUDGET

REVISED DURING CONTINGENCY PROCESS. SEE INSERT.

PAGES 176 - 186 REMOVED + REPLACED WITH WHAT FOLLOWS PAGE 186



Application for an Open-Enrollment Charter School - Seventeenth Generation Start-Up Budget Template Instructions Instructions to complete Start-up budget template.

1. Enter the name of the sponsoring entity.	Great Hearts Ame	rica Texas	/	
2. Enter the name of the proposed charter school:	Great Hearts Academies San Antonio			
3. Enter the date range for the proposed charter school's start-up budget:	03/01/2012	to 08/31/2013		

- 4. Enter data in cells requiring a number or indicating that a description needs to be entered. Totals and subtotals will automatically calculate.
- 5. To complete the budget template, use the Special Supplement to Financial Accounting and Reporting. Nonprofit Charter School Chart of Accounts to ensure that the account codes are used appropriately. The special supplement can be found in the School Finance Section of the TEA website.
- 6. The Summary of Estimated Revenues and Expenses reports the totals entered into the revenue and expenditure by object code classification. Data does not need to be entered into the summary page.
- 7. Enter information regarding beginning net assets to be made available to the charter school in the *Schedule of Net Assets at Beginning of Year*. Include a description and a dollar amount for each source of funds identified as a net asset. The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 8. Enter information regarding revenues in the Schedule of Estimated Revenues. Include a description and a dollar amount for each source of funds identified as revenues. The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 9. Enter information regarding expenditures in the Schedule of Estimated Expenses.
- 10. The start-up budget must identify all sources of funding and anticipated expenses. The revenues and expenses for each entry in the budget template must be supported with written calculations indicating how the amounts were derived. (For example, 3 teachers @ \$30,000 annual salary = \$90,000 salaries or wages entered to line 6119). These written calculations should be attached following the printout of the completed start-up budget template.
- 11. Forward a copy of the completed template including the supporting written calculations with the charter application.

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Page 1 of 10

## Application for an Open-Enrollment Charter School - Seventeenth Generation Summary of Estimated Revenues and Expenses

#### Great Hearts America - Texas Great Hearts Academies -- San Antonio Budget for the period 03/01/2012 to 08/31/2013 Temporarily Permanently **Unrestricted Net** Restricted Net **Restricted Net Total Net Assets** Assets Assets Assets Net Assets at Beginning of Year 0 \$ 0 \$ S \$ 0 **Total Estimated Revenues** 1,900,000 \$ \$ 1,100,000 \$ \$ 3,000,000 Estimated Expenses: 6100 Payroll Costs 610,504 610,504 6200 Professional and Contracted Services 278,550 278,550 6300 Supplies and Materials 194,600 194,600 6400 Other Operating Costs 16,340 16,340 6500 Debt Expenses Other Expenses 1,099,994 1,099,994 S \$ S **Total Estimated Expenses** 1,900,008 6 \$ 1,900,000 \$ Change in Net Assets \$ s 1.900,006 1.900.000 \$ Net Assets at End of Year \$ \$ 6 0 Great 17 SAS 536-12 RFA 701-11-108 Page 2 of 10

## Application for an Open-Enrollment Charter School - Seventeenth Generation Schedule of Net Assets at Beginning of Year

Great Hearts America -- Texas

Great Hearts Academies -- San Antonio

Budget for the period 08/31/2013 to 03/01/2012 Permanently Temporarily Unrestricted Net Description of Net Assets Restricted Net **Restricted Net Total Net Assets** Assets Assets Assets [Enter description here.] 0 0 0 n [Enter description here.] es l 0 Net Assets at Beginning of Year 0 \$ 0 \$ GreatHeal 178 SAS 536-12 RFA 701-11-108 Page 3 of 10

# Great Hearts America -- Texas Great Hearts Academies -- San Antonio

Page 4 of 10

Budget for the period	03/01/20	)12 to	08/31/2	2013
Description of Estimated Revenues	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
The Brackenridge Foundation grant	600,000	400.000		1.000.000
The Ewing Halsell Foundation anticipated grant	500.000	1.500.000		2.000.000
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]	$\times$			
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
Total Estimated Revenues	<u>\$ 1,100,000</u>	\$ 1.900,000	\$	\$ 3.000,000
				GreatHea
				Gres

SAS 536-12 RFA 701-11-108

## Great Hearts America -- Texas Great Hearts Academies -- San Antonio

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Budget for the period	03/01/20	)12 1	0 08/31/20	013
	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
Estimated Expenses:		/		
6100 Payroll Costs				
6112 Salaries or Wages for Substitute Teachers	0			0
6119 Salaries or Wages Teacher and Other Professional Personnel	520.524			520 521
6121 Extra Duty Pay/Overtime - Support Personnel				0
6129 Salaries or Wages for Support Personnel	0			0
6139 Employee Allowances				0
6141 Social Security/Medicare	39.820			39 820
6142 Group Health and Life Insurance	22,500			22,500
6143 Workers' Compensation	4.685			4 685
6145 Unemployment Compensation	10410			10 410
6146 Teacher Retirement/TRS Care	5 789			5 789
6149 Employee Benefits	6.779			6 779
Total Payroll Costs	\$ 610,504	\$	\$	\$ 610,504

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Page 5 of 10

#### Great Hearts America -- Texas Great Hearts Academies -- San Antonio Budget for the period 08/31/2013 03/01/2012 to Temporarily Permanently Unrestricted Net **Restricted Net Restricted Net Total Net Assets** Assets Assets Assets **Estimated Expenses:** 6200 Professional and Contracted Servises 6211 Legal Services 15 000 15 000 6212 Audit Services 0 0 6219 Professional Services 100 000 100.000 6221 Staff Tuition and Related Fees--Higher Education 6222 Student Tuition--Public Schools 6223 Student Tuition-Other than Public Schools 6229 Tuition and Transfer Payments 6239 Education Service Center Services 6249 Contracted Maintenance and Repair 100 001 100,000 6259 Utilities 5 758 5 750 6269 Rentals--Operating Leases 33 800 33 800 6299 Miscellaneous Contracted Services 24 000 24.000 278,550 Total Professional and Contracted Services 278,550 \$ Greath

SAS 536-12 RFA 701-11-108

### Great Hearts America -- Texas Great Hearts Academies -- San Antonio

Budget for the period	03/01/20	12 t	0 08/31/2	2013
	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
Estimated Expenses:				
6300 Supplies and Materials		/		
6311 Gasoline and Other Fuels for Vehicles (Including Buses)				
6319 Supplies for Maintenance and/or Operations				
6321 Textbooks	139 250			139.250
6329 Reading Materials	5 570			5 570
6339 Testing Materials	X			
6341 Food				
6342 Non-Food				
6343 Items for Sale				
6344 USDA Donated Commodities				
6349 Food Services Supplies				
6399 General Supplies	49 780			49 780
Total Payroll Costs	\$ 194,600	\$	S	\$ 194,600
				-
				SAS 53
Page 7 of 10				RFA 701-11

# Great Hearts America -- Texas Great Hearts Academies -- San Antonio

Page 8 of 10

Budget for the period 08/34/2013 03/01/2012 to Temporarily Permanently Unrestricted Net **Restricted Net Restricted Net Total Net Assets** Assets Assets Assets Estimated Expenses: 6400 Other Operating Costs 6411 Travel and Subsistence--Employee Only 3 700 3 700 6412 Travel and Subsistence--Students 6413 Stipends--Non-Employees 6419 Travel and Subsistence--Non-Employees 6429 Insurance and Bonding Costs 12 640 12 640 6449 Depreciation Expense 6494 Reclassified Transportation Expenses 6499 Miscellaneous Operating Costs 16,340 **Total Other Operating Costs** 16,340

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SAS 536-12 RFA 701-11-108

Great Hearts America -- Texas Great Hearts Academies -- San Antonio

Budget for the period	03/01/20	12	to 08/31/2	2013
	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
Estimated Expenses:		/		
6500 Debt Expense				
6521 Interest on Bonds				
6522 Capital Lease Interest				
6523 Interest on Debt				
6529 Interest Expenses				
6599 Other Debt Fees				
Total Estimated Exprenses	S	\$	\$	\$
	/			
				SAS 53

# Great Hearts America -- Texas Great Hearts Academies -- San Antonio

Budget for the period

Budget for the period	03/01/20	12	to 08/31/2	2013
	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
Other Expenses				
nter description here.]				
Inter description here.]				
Enter description here.]			t	
Enter description here.] Enter description here.]				
fotal Other Expenses	\$	8	\$	\$
		<u></u>	<u> </u>	<u></u>
otal Estimated Expenses	1.099.994	\$	\$	<u>\$ 1.099,994</u>
				GreatHearts
				185
				SAS 536-12
age 10 of 10				RFA 701-11-108

## Supporting Calculations for the Start Up Year Budget

Enrollment	Attendance	FSP	FSP	-
Year one Max.	80%		Total \$	
			\$1,100,000	All Private/Foundation Grants
100 - Salaries:				FTEs Notes
	ddle/High Prep Headmaster/P	Principal (14 monthe)	\$ 122,500	
	ary (Archways) Headmaster/F	the second se	\$ 75,000	
Hat-time K-5 Elementary (Arc	and the second se	and the second se	\$ 8,125	
		erations (14 months)	\$ 87,500	1 Start 7/1/12
	Office A	ssistants (3 months)	\$ 22,500	1.5 Start 6/1/13
	Ath'etic	Director (5 months)	\$ 23,333	1 Staft 4/1/13
eachers & other Professional Personnel	ers (12.5FTE) @ \$ 42,000 (av	ornac) (1 E monthe)	\$ 65,625	12.5 Start 7/15/13
	Teachers (17) @ \$ 37,500 (a)			
	Teachers (8) @ \$ 25,000 (av		\$ 25,000	
	2 Teachers (Special Ed.) @ \$		\$ 11,250	
upport Personnel			1	1
			\$ /	]
112 - Substitutes-\$80/day,			\$ /-	
Total Sala	riles		\$ \$20,521	45.5 Total FTEs
			/	
	1			
141 - Medicare - 1.45% of total salaries			\$ 7,548	
141 - Social Security - 6.2% of total salaries	polouno (45 months in Pratin	Vel	\$ 32,272 \$ 22,500	\$ 39,820 6141 Total
142 - Insurance Benefits - \$500/mo *12mos, per F-T en 143 - Worker's Compensation Insurance - 0.90% of tota		11 /	\$ 4,685	1
145 - Unemployment Compensation Insurance - 0.50% of the	the second s		\$ 10,410	-
146 - TRS - Reporting Entity 0.55% of total salaries			\$ 2,863	
146 - TRS - New Member match 6.446% for 25% of tot	al teacher salaries for up to 90	) days	\$ 2,926	
149 - Employee Benefits - Employer 403(b) match at 29	6 of total non-teacher salaries	1	\$ 6,779	
	Tòţal	Payroll Cost (6100)	\$ 610,504	
Professional & Contracted Services (6200):	X			]
211 - Legal Services			\$ 15,000	
212 - Audit Services		1	5 -	4
219 - Professional Svs.	CMO Services (Charter		\$ 100,000	4
249 - Contracted Maintenance & Repair		enant Improvements	and the second se	4
259 - Utilities	\$125/mo. Phone	14	\$ 1.750	1
	\$2,000/mo. Electricity	2	\$ 4,000	\$ 5,750 6259 Total
269 - Rentals	\$400/mo. Copier	12		
	\$19,000/mo. Rent -	1		1
	new facility	1.5	\$ 15,000	
	\$1,000/mo. Rent -		1	a contraction
	temp office	14	and the second s	\$ 33,800 6269 Total
299 - Misc. Svshousekeep & supplies	Stal Professional & Contract	12		
		Ind Services (0200)	3 210,000	4
upplies (6300):	\$250/student		1	1
321 - Textbooks	enroliment	557	\$ 139,250	
329 - Books -library	\$10 each	557	\$ 5,570	k -
339 - Testing mat.	\$20/student	0	\$ -	
399 - Other mat.	\$10/student	557	\$ 5,570	
399 - Class supplies	\$30/student	557	\$ 16,710	
399 - Computer hardware	\$2,500 each	11	\$ 27,500	1 40 TO 6200 Total
399 - Band/drama	\$30/student	0	\$ -	\$ 49,750 6399 Total
	T_	tal Supplies (6300)	\$ 194,600	
isa Operating Casta (6400).	1 1	m orthugs (0200)	0 104,000	
lisc. Operating Costs (6400):	\$2,500 + \$200/ admin			
	\$2,500 + \$200/ admin staff	6	\$ 3,700	X
411 - Travel and SubstitenceEmployee Only				
411 - Travel and SubstitenceEmployee Only 429 - Insurance and Bonding Costs	\$1,500 + \$20/student	557	D 12.040	
411 - Travel and SubstitenceEmployee Only 429 - Insurance and Bonding Costs 499 - Misc. Operating Costs /	\$1,500 + \$20/student	557	\$ 12,640 \$ -	
129 - Insurance and Bonding Costs	\$1,500 + \$20/student	55/		

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Application for an Open-Enroliment Charter School - Seventeenth Generation

Start-Up Budget Template Instructions

Instructions to complete Start-up budget template.

1.	Enter	the	name	of	the	sponsoring	entity.
----	-------	-----	------	----	-----	------------	---------

2. Enter the name of the proposed charter school:

Great Hearts Academies - San Antonio

Great Hearts America - Texas

to

08/31/2013

- 3. Enter the date range for the proposed charter school's start-up budget: 9783/01/2012
- 4. Enter data In cells regulring a number or indicating that a description needs to be entered. Totals and subtotals will automatically calculate.
- 5. To complete the budget template, use the <u>Special Supplement to Financial Accounting and Reporting</u>, <u>Nonprofit Charter School Chart of Accounts</u> to ensure that the account codes are used appropriately. The special supplement can be found in the School Finance Section of the TEA website.
- 6. The Summary of Estimated Revenues and Expenses reports the totals entered into the revenue and expenditure by object code classification. Data does not need to be entered into the summary page.
- 7. Enter Information regarding beginning net assets to be made available to the charter school in the Schedule of Net Assets at Beginning of Year. Include a description and a dollar amount for each source of funds identified as a net asset. The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 8. Enter Information regarding revenues In the Schedule of Estimated Revenues. Include a description and a dollar amount for each source of funds identified as revenues. The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 9. Enter information regarding expenditures in the Schedule of Estimated Expenses.
- 10. The start-up budget must identify all sources of funding and anticipated expenses. The revenues and expenses for each entry in the budget template must be supported with written calculations indicating how the amounts were derived. (For example, 3 teachers @ \$30,000 annual salary = \$90,000 salaries or wages entered to line 6119). These written calculations should be attached following the printout of the completed start-up budget template.
- 11. Forward a copy of the completed template including the supporting written calculations with the charter application.

Application for an Open-Enrollment Charter School - Seventeenth Generation Summary of Estimated Revenues and Expenses

Great Hearts America - Texas

Great Hearts Academies - San Antonio

Budget for the period	0 05/01/2012 to 08/31/2013
	Discrete         to         08/31/2013           Unrestricted Net         Temporarily Restricted Net         Permanently Restricted Net         Total Net Assets           \$         0 \$         0 \$         0 \$         0 3,250,000         0 3,250,000           \$         1,375,000         1,375,000         1,375,000         3,250,000         3,000,000           \$         1,100,000         1,900,000         \$         3,000,000         3,000,000
Net Assets at Beginning of Year	\$ 0\$ 0\$ 0\$ 0 1,375,000 1,875,000 3,250,000 E
Total Estimated Revenues	\$ 1,375,000 1,875,000 3,250,000 2 \$ 1,100,000 \$ 1,900,000 \$ \$ 3,000,000 22
Estimated Expenses:	ROCE
6100 Payroll Costs	611,446 610,504 610,504 63
6200 Professional and Contracted Services	288,300 278,550 282,300 278,550
5300 Supplies and Materials	194,600 - 194,600 -
6400 Other Operating Costs	16,340 v 16,340 v
3500 Debt Expenses	
Other Expenses	
Total Estimated Expenses	\$ 1,099,994 \$ Ø \$ \$ 1,099,994 1,110,626 1,110,686 1,875,000
Change in Net Assets	\$ 264,314 - \$ 1900;000 \$ \$ 1,900;000 \$ \$ 1,900;000 \$
Net Assets at End of Year	\$ 264,314 5 \$ 1,909.000 \$ 0 \$ 1,900.006 D
	1, 87-5,000 \$ 2,139,314

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RFA 701-11-108

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Application for an Open-Enrollment Charter School - Seventeenth Generation Schedule of Net Assets at Beginning of Year

Great Hearts America - Texas

Great Hearts Academies - San Antonio

Budget for the period	CR 03/61/20	12 to	08/31/2	013
Description of Net Assets	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
[Enter description here.]	0	0	0	0
[Enter description here.]	Ť			
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				· · · · · ·
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
[Enter description here.]				
Net Assets at Beginning of Year	<u>\$</u>	<u>\$0</u>	<u>\$0</u>	s 6
				0
				1 T
[Enter description here.] [Enter description here.] [Enter description here.] [Enter description here.] [Enter description here.] [Enter description here.] [Enter description here.] Net Assets at Beginning of Year	й ОСЕ	0		GrastHag Pc
	SS		2	
-				SAS 536-

Great Hearts America - Texas Great Hearts Academies - San Antonio 9) Budget for the period 03/01/2012 08/31/2013 to Temporarily Permanently **Unrestricted Net Description of Estimated Revenues Restricted Net Restricted Net** Total Net Assets Assets Assets Assets The Brackenridge Foundation grant 87500 400.000 125.000 600.000 1.000,000 The Ewing Halsell Foundation anticipated grant 1,00000 508.000 2,0000 1,500.000 2,000,000 [Enter description here.] San Autonia Area Foundation grant 250,000 250,000 [Enter description here.] **Total Estimated Revenues** 1,198.000 1,900.000 3.000.000 Greathear Greathear 1,375,000 1, 275,000 SSECORD DURING CONTINGENCY PROCESS SAS 536-12 Page 4 of 10 RFA 701-11-108

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Great Hearts America - Texas Great Hearts Academies - San Antonio

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Great Hearts Academies - San Antonio Budget for the period		() 23/01/20	112 1	to 08/31/2013		
	0	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets	
Estimated Expenses:						
6100 Payroll Costs						
6112 Salarles or Wages for Substitute Teachers	Second Second	0			n0	
6119 Salaries or Wages - Teacher and Other Profe		528521			520 521	521,354
6121 Extra Duty Pay/Overtime - Support Personne					l0	
6129 Salaries or Wages for Support Personnel						
6139 Employee Allowances		0				1
6141 Social Security/Medicare	39,884	39-820		L	39.820	39,884
6142 Group Health and Life Insurance	ш.	× 22.500			22 500	
6143 Workers' Compensation	4,692	4-885			4 685	4,692
6145 Unemployment Compensation	10,427	104101			10,410	10,427
6146 Teacher Retirement/TRS Care	. 5,793	5780			5 789	5,793
6149 Employee Benefits	6,796	6779			6 779	6,796
Total Payroll Costs	R 611, 446	\$ 610.504	\$	\$	\$ 610.504	D 611,446
	4	-				611,446
						180
Page 5 of 10		NING	VED DURING CC	ОЯЧЧА	SAS 536 RFA 701-11-1	
	AR YONED DURING CONTINGENCY PR					

#### Great Hearts America - Texas Orest Hands Bandandan Dan Anto

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Great Hearts Academies - San Antonio	)			
Budget for the period	_95/01/2012	to	08/31/	2013
8	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Tob
Estimated Expenses:				
6200 Professional and Contracted Services				
6211 Legal Services	A 15 000			
5212 Audit Services	PR 12,000 AT		1	
19 Professional Services	0 100.000			
Staff Tuition and Related Fees-Higher Education				
Student Tultion-Public Schools				
Student Tuition-Other than Public Schools				
29 Tuition and Transfer Payments				
39 Education Service Center Services				
49 Contracted Maintenance and Repair				
259 Utilities	5.500 5750	1		5
9 Rentals-Operating Leases	31,820 32-800	ir		31.
299 Miscellaneous Contracted Services	24.000			
Total Professional and Contracted Services	APPROVED DURING CONTINUED DURING CONTINU	3		5
SS	288300			专

15,000	15 000
12,000 AT	12,000 A
100.000	100.000
100.000	100.000
5500 5750	 5,500 5750
31,800 32-800	31.800 33-800
24 000	24 000
<u>278-550 \$</u>	\$ <u>\$ 278,550</u>
288,300	* 288,300
	er.

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**Total Net Assets** 

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Great Hearts America – Texas Great Hearts Academies – San Antonio

Budget for the period 03/01/2012 to 08/31/2013 Permanently Temporarily **Unrestricted Net Restricted Net Restricted Net Total Net Assets** Assets Assets Assets **Estimated Expenses:** 6300 Supplies and Materials 6311 Gasoline and Other Fuels for Vehicles (Including Buses) 6319 Supplies for Maintenance and/or Operations 6321 Textbooks 139 250 139 250 6329 Reading Materials 5.570 5 570 6339 Testing Materials 6341 Food 6342 Non-Food 6343 Items for Sale 6344 USDA Donated Commodities 6349 Food Services Supplies 6399 General Supplies 49 780 49.780 Greathean annual transmission **Total Payroll Costs** 194.600 \$

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SAS 536-12

RFA 701-11-108

Application for an Open-Enrollment Charter School - Seventeenth Generation

Schedule of Estimated Expenses

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Great Hearts America – Texas Great Hearts Academies – San Antonio

Budget for the period	23/01/20	12	to 08/31/2	2013
	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net	Total Net Assets
Estimated Expenses:				
6400 Other Operating Costs				
6411 Travel and Subsistence-Employee Only	3.700	-		3,700
6412 Travel and Subsistence-Students				
6413 Stipends-Non-Employees			1	
6419 Travel and Subsistence-Non-Employees				
6429 Insurance and Bonding Costs	12.640			12 640
6449 Depreciation Expense				
6494 Reclassified Transportation Expenses				
6499 Miscellaneous Operating Costs		-		
Total Other Operating Costs	<u>\$ 16.340</u>	\$	\$	\$ 16.340

SAS 536-12 RFA 701-11-108

Page 8 of 10

Great Hearts America - Texas Great Hearts Academies - San Antonio

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Great Hearts Academies - San Antonio	a	
Budget for the period		to 08/31/2013
	Accets Restri	porarily Permanently Icted Net Restricted Net Total Net Assets Seets Assets
Estimated Expenses:		
6500 Debt Expense		
6521 Interest on Bonds		
6522 Capital Lease Interest		
6523 Interest on Debt		
6529 Interest Expenses		
6599 Other Debt Fees		
Total Estimated Exprenses	<u>s</u> s	<u> </u>
		ABONUNOS ONNANG OBVORGO DURANG CONTINUE EN 200 110 110 100 100 100 100 100 100 100
		Great Hearts APPROVED DURING CONTINUED
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Page 9 of 10		SAS 536-12 RFA 701-11-108

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Great Hearts America - Texas

Great Hearts Academies -- San Antonio

	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
	prime and a second seco			
	.\$	\$	<u>\$</u>	\$
AP	<u>\$ 1,099,994</u>	\$	\$	\$ 1.099,994
PRO	1,110,680			1,110,686
VED				
DUR				2
ING				GreatHearts
CON				H.
TING				63
ENC				
Y PF				185
ROC				
ESS	2			SAS 536-12 RFA 701-11-108
	APPROVED DURING CONTINGENCY PROCESS		APPROVED DURING CONTINGENCY PROCESS	APPROVED DURING CONTINGENCY PROCESS

		A,	PRO	ED	110		VCY PROCES
upporting Calculations for the Start	Up Year Budget				URING	CONTIN	
						WGE	VCYDDA
Enrolimont	Attendance	FSP	FSP				PROCES
Year one Max.	80%		Total				
			ASTROOP			oundation Grants	
		1.1.1	The second second	1.1.1			
IOO - Salaries:					FTEs	Notes	
6-12 M	Iddle/High Prep Headmaster/F	Principal (14 months)	\$ 122,1	500	1	Start 7/1/12	
	tary (Archways) Headmaster/F		\$ 75,	000	1	Start 9/1/12	
Half-time K-6 Elementary (Arch				125		Start 8/1/13	
		erations (14 months)				Start 7/1/12	
		salstanta (3 months)		and the second se		Start 6/1/13	
	Anieta	Director (6 months)	\$ 23,	333	1	Start 4/1/13	
analoga & albas Durfagalanal Domanant							
eachers & other Professional Personnal 6-9th Prep Teach	ers (12.5FTE) @ \$ 42,000 (a)	verage) (1.5 months)	\$ 66,	825	12.5	Slart 7/15/13	
	Teachers (17) @ \$ 37,600 (at		\$ 79,		17	Start 7/15/13	
K-5 Apprentice	e Teachers (8) @ \$ 25,000 (a	verage) (1.5 months)	\$ 25,	the second se	8	Start 7/16/13	
	2 Teachers (Special Ed.) @ 1		\$ 11.	250	2	Start 7/16/13	
upport Personnel							τ
				-			
112 - Substitutes-\$80/day,			\$	•			
Total Sala	ineg		\$ 520,	021	45.5	Total FTEs	
				-			
141 - Medicare - 1.45% of lotal salaries			\$ 7.	548			
141 - Social Security - 6.2% of total salaries				272 \$	30.000	6141 Total	
142 - Insurance Benefita - \$500/mo *12mos, per F-T en	noloves (45 months in Startur	Yrl	the second se	600	00,000	UT41 I Didi	
143 - Worker's Compensation Insurance - 0.90% of tota				685			
146 - Unemployment Compensation Insurance - 2.00%				410			
	the second se						
146 - TRS - Reporting Entity 0.55% of total salaries			And and a second se	883			
146 - TRS - Reporting Entity 0.55% of total selaries 146 - TRS - New Member match 6.446% for 25% of tot	al toacher salaries for up to 9	0 days	\$ 2,		5,789	6146 Total	
	% of total non-teacher salaries	9	\$ 2, \$ 2, \$ 8, \$ 8,	863 926 \$ 779	5,789	6146 Total	
146 - TRS - New Member match 6,446% for 25% of tol. 149 - Employee Benefits - Employer 403(b) match at 29	% of total non-teacher salaries	No. of Concession, Name of Street, or other Designation, or other	\$ 2, \$ 2, \$ 8, \$ 8,	863 926 \$ 779	5,789	6146 Total	
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200):	% of total non-teacher salaries	9	\$ 2, \$ 2, \$ 8, \$ 8, \$ 8,	883 926 \$ 779 5065	5,789	6146 Total	
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services	% of total non-teacher salaries	9	\$ 2, \$ 2, \$ 8, \$ 8, \$ 8, \$ 15,	863 926 \$ 779	5,789	6146 Total	
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services	% of total non-teacher salarier Total	s Payroll Cost (6100)	\$ 2, \$ 2, \$ 8, \$ 6, \$ 6, \$ 15, \$	863 926 779 508 508 508	5,789	6146 Total	
146 - TRS - New Member match 6,446% for 25% of tol 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs.	% of total non-teacher salarier Total CMO Services (Charte	e Payroll Cost (6190) or app, mrktg, payroll	\$ 2, \$ 2, \$ 8, \$ 6, \$ 100, \$ 100,	863 926 \$779 \$000 - 000	5,789	6146 Total	
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofeesional & Contracted Bervices (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair	% of total non-teacher salarier Total CMO Services (Charte	s Payroll Cost (6100) or app, mrktg, payroll) Fenant Improvements	\$ 2, \$ 2, \$ 8, \$ 6, \$ 100, \$ 100, \$ 100,	863 926 \$779 508 508 508 508 508 508 508 508 508 508	5,789		
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services	% of total non-teacher salarier Total CMO Services (Charte	s Payroll Cost (6100) or app, mrktg, payroll) Fenant Improvements	\$ 2, \$ 2, \$ 6, \$ 6, \$ 100, \$ 100, \$ 100,	863 926 \$779 \$000 - 000	5,789		
146 - TRS - New Member match 6,446% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair	% of total non-teacher salarier Total CMO Services (Charte \$125/mo. Phone	s Payroll Cost (6100) or app, mrktg, payroll) Fanant Improvements 14	\$ 2, \$ 2, \$ 6, \$ 6, \$ 15, \$ 100, \$ 100, \$ 100, \$ 1,	883 926 779 5055 5055 - 000 - 000 000 750			
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofeesional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity	9 Payroll Cost (6100) or app, mrktg, payroll Fenant Improvements 14	\$ 2, \$ 2, \$ 8, \$ 100, \$	883 926 779 5025 5025 - 000 - 000 7,750 000 \$			
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier	9 Payroll Cost (6100) or app, mrktg, payroll Fenant Improvements 14	\$ 2, \$ 2, \$ 8, \$ 100, \$	883 926 779 5055 5055 - 000 - 000 000 750			
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofeesional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity	9 Payroll Cost (6100) or app, mrktg, payroll Fenant Improvements 14	\$ 2, \$ 2, \$ 6, \$ 6, \$ 15, \$ 15, \$ 100, \$ 100, \$ 1, \$ 1, \$ 1, \$ 4, \$ 4, \$ 4,	883 926 779 5025 5025 - 000 - 000 7,750 000 \$			
146 - TRS - New Member match 6,446% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofeesional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent -	s Payroll Cost (6100) or app, mrktg, payroll fenant Improvements 14 2 12	\$ 2, \$ 2, \$ 8, \$ 8, \$ 100, \$ 100,	883 826 779 800 - 000 - 000 000 800 800 80	5,750	6259 Total	
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities 269 - Rentals	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - temp office	s Payroll Cost (6100) or app, mrktg, payroll fenant improvements 14 2 12 12 1.6	\$ 2, \$ 2, \$ 8, \$ 8, \$ 100, \$ 100,	883           826           779           800           -           000           -           000           -           000           -           000           5           0000           \$           0000           \$           0000           \$           0000           \$           0000	5,750		
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofeestional & Contracted Bervices (6200): 211 - Legal Services 212 - Audit Services 219 - Profeesional 8vs. 249 - Contracted Maintenance & Repair 259 - Utilities 269 - Rentals 269 - Rentals	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - temp office \$2,000/mo.	s Payroll Cost (6100) or app, mrktg, payroll fenant improvements 14 2 12 12 14 14	\$ 2, \$ 2, \$ 8, \$ 8, \$ 15, \$ 100, \$ 100,	883         826           926         \$           779         5000           -         0000           -         0000           -         0000           0000         \$           0000         \$           0000         \$           0000         \$           0000         \$	5,750	6259 Total	
146 - TRS - New Member match 6,446% for 25% of tob 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Bervices (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities 269 - Rentals 269 - Rentals	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - temp office	s Payroll Cost (6100) or app, mrktg, payroll fenant improvements 14 2 12 12 14 14	\$ 2, \$ 2, \$ 8, \$ 8, \$ 15, \$ 100, \$ 100,	883         826           926         \$           779         5000           -         0000           -         0000           -         0000           0000         \$           0000         \$           0000         \$           0000         \$           0000         \$	5,750	6259 Total	
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146 - TRS - New Member match 6,446% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Bervices (6200): 211 - Legal Services 212 - Audit Services 219 - Professional 8vs. 249 - Contracted Maintenance & Repair 259 - Utilities 269 - Rentals 269 - Rentals 269 - Misc. Svshousekeep & supplies Tupplies (6300): 321 - Textbooks 329 - Books -Ilbrary	% of total non-teacher satarier Total CMO Services (Charte \$125/mo. Phone) \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - temp office \$2,000/mo. fotal Professional & Contrac \$250/student enroliment \$10 each	s Payroll Cost (6100) or app, mrktg, payroll fenant improvements 14 2 12 12 14 12 14 12 14 12 14 12 14 15 14 14 12 14 15 14 14 15 14 14 12 14 15 14 14 15 14 14 15 14 14 14 14 14 14 14 14 14 14 14 14 14	\$ 2, \$ 2, \$ 2, \$ 6, \$ 15, \$ 100, \$ 100,	883         8           926         \$           779         9           000         -           000         -           000         -           000         -           000         -           000         5           0000         \$           0000         \$	5,750	6259 Total	
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46 - TRS - New Member match 6,446% for 25% of tot         149 - Employee Benefits - Employer 403(b) match at 29         rofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         259 - Other test         269 - Rentals         289 - Misc. Svshousekeep & supplies         211 - Textbooks         329 - Books -ilbrary         339 - Testing mat.         389 - Other mal.         389 - Computer hardware	% of total non-teacher sataries Total CIMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - new facility \$1,000/mo. Rent - temp office \$2,000/mo. fotal Professional & Contrac \$250/student esroilment \$10 each \$20/student \$30/student \$30/student \$30/student	s Payroll Cost (6100) or app, mrktg, payroll fenant improvements 14 2 12 12 12 12 12 12 12 12 12 12 12 12 1	\$ 2, \$ 2, \$ 2, \$ 4, \$ 100, \$ 100,	883         8           826         \$           779         8           000         -           000         -           000         5           0000         \$	5,750 33,800	6259 Total	
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146 - TRS - New Member match 6,446% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Bervices (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities 269 - Rentals 269 - Rentals 269 - Misc. Svshousekeep & supplies 209 - Misc. Svshousekeep & supplies 211 - Textbooks 329 - Books -Ilbrary 339 - Testing mat. 399 - Other mal. 399 - Computer hardware 399 - Band/drame	% of total non-teacher satarie Total Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - temp office \$2,000/mo. Rent - temp office \$2,000/mo. \$2,000/mo. Stotal Professional & Contract \$250/student \$20/student \$10/student \$30/student \$30/student \$30/student	s Payroll Cost (6100) or app, mrktg, payroll fenant improvements 14 2 12 12 12 12 12 12 12 12 12 12 12 12 1	\$ 2, \$ 2, \$ 2, \$ 3, \$ 4, \$ 100, \$ 5, \$ 5, \$ 5,	883       826       779       000       -       000       -       000       -       000       -       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       0000       \$       .0000 <tr< td=""><td>5,750 33,800</td><td>6259 Total</td><td></td></tr<>	5,750 33,800	6259 Total	
146 - TRS - New Member match 6,446% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Bervices (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities 269 - Rentals 269 - Rentals 269 - Misc. Svshousekeep & supplies 209 - Misc. Svshousekeep & supplies 211 - Textbooks 329 - Books -Ilbrary 339 - Testing mat. 399 - Other mal. 399 - Computer hardware 399 - Band/drame	% of total non-teacher sataries Total CMO Services (Chartes \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - new facility \$1,000/mo. Rent - temp office \$2,000/mo. fotal Professional & Contract \$250/student esrroliment \$10 each \$20/student \$30/student \$30/student	8 Payroll Cost (6100) or app, mrktg, payroll fenant improvements 14 2 12 12 14 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 14 12 14 14 12 14 14 12 14 14 14 14 14 14 14 14 14 14 14 14 14	\$ 2, \$ 2, \$ 2, \$ 3, \$ 4, \$ 100, \$ 5, \$ 5, \$ 5,	883       826       779       000       -       000       -       000       -       000       -       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       0000       \$       .0000 <tr< td=""><td>5,750 33,800</td><td>6259 Total</td><td></td></tr<>	5,750 33,800	6259 Total	
146 - TRS - New Member match 6,446% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Bervices (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 269 - Utilities 269 - Rentals 269 - Rentals 289 - Misc. Svshousekeep & supplies Tupplies (6300): 321 - Textbooks 328 - Books -Ilbrary 339 - Testing mat. 399 - Other mat. 399 - Other mat. 399 - Class supplies 399 - Computer hardware 399 - Band/drama	% of total non-teacher satarie Total Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - temp office \$2,000/mo. Rent - \$2,000/mo. Rent - \$2,00	s Payroll Cost (6100) or app, mrktg, payroll fanant improvements 14 2 12 12 14 14 12 14 14 12 12 14 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 14 12 14 14 12 14 14 14 14 14 14 14 14 14 14 14 14 14	\$ 2, \$ 2, \$ 2, \$ 3, \$ 4, \$ 100, \$ 5, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5,	883       826       779       000       -       000       -       000       -       000       -       000       -       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       000       0000       570       -       570       -       570       -       570       -       570       -       570       -       500       -       4000	5,750 33,800	6259 Total	
146 - TRS - New Member match 6,446% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 269 - Contracted Maintenance & Repair 269 - Rentals 269 - Rentals 269 - Rentals 289 - Misc. Svshousekeep & supplies 321 - Textbooks 329 - Books -Ilbrary 339 - Testing mat. 399 - Other mal. 399 - Other mal. 399 - Other mal. 399 - Computer hardware 399 - Band/drams 411 - Travel and SubstitenceEmployee Only	% of total non-teacher satarier Total CMO Services (Charte \$125/mo, Phone) \$2,000/mo, Electricity \$400/mo, Copier \$10,000/mo, Rent - new facility \$1,000/mo, Rent - temp office \$2,000/mo fotal Professional & Contract \$250/student enroliment \$10 each \$20/student \$20/student \$30/student \$30/student \$30/student \$30/student	s Payroll Cost (6100) or app, mrktg, payroll fanant improvements 14 2 12 12 14 14 12 14 12 14 12 14 12 16 14 12 12 12 12 12 12 12 12 12 12 12 12 12	\$ 2, \$ 2, \$ 2, \$ 6, \$ 100, \$ 5, \$ 5, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5,	883       826       779       000       -       000       -       000       -       000       -       000       -       0000       570       -       570       -       570       -       570       -       500       -       3000       -       3000       -       500       -       3000       -       3000       -       500       -       3000       -       -       3000       -       -       -       -       -       - <tr< td=""><td>5,750 33,800</td><td>6259 Total</td><td></td></tr<>	5,750 33,800	6259 Total	
146 - TRS - New Member match 6,448% for 25% of tot 149 - Employee Benefits - Employer 403(b) match at 29 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 269 - Utilities 269 - Rentals 269 - Rentals 289 - Misc. Svshousekeep & supplies Tupplies (6300): 321 - Textbooks 329 - Books -Ilbrary 339 - Testing mat. 399 - Other mal. 399 - Class supplies 399 - Computer hardware 399 - Band/drama Iliac. Operating Costs (6400):	% of total non-teacher satarie Total Total CMO Services (Charte \$125/mo. Phone \$2,000/mo. Electricity \$400/mo. Copier \$10,000/mo. Rent - new facility \$1,000/mo. Rent - temp office \$2,000/mo. Rent - \$2,000/mo. Rent - \$2,00	s Payroll Cost (6100) or app, mrktg, payroll fanant improvements 14 2 12 12 14 14 12 14 14 12 12 14 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 12 14 14 12 14 14 14 14 14 14 14 14 14 14 14 14 14	\$ 2, \$ 2, \$ 2, \$ 6, \$ 100, \$ 5, \$ 5, \$ 5, \$ 5, \$ 100, \$ 5, \$ 5,	883       826       779       000       -       000       -       000       -       000       -       0000       0000    <	5,750 33,800	6259 Total	

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Total Estimated Expenses >>>> \$ 1,099,994

#### Supporting Calculations for the Start Up Year Budget

APPROVED DURING CONTINGENCY PROCESS Enrollment Attendance FSP Year one Max. 80% Total \$ All Private/Foundation Grants \$1,375,000 6100 - Salaries: FTES Notes Budgeted Start 11/1/12 Headmaster (10 months) \$ 87.500 1 Head of Lower School (6 months) \$ Budgeted Start 3/1/13 37,500 1 Start 6/1/13 Assistant Headmaster (3 months) \$ 8,125 0.5 Budgeted Start 3/1/13 Director of Operations (6 months) 37,500 1 \$ Office Assistants (5 months) 5 25,000 1.5 Start 4/1/13 23,333 Start 4/1/13 Athlatic Director (5 months) \$ 1 CEO/Superintendent (10 months) \$ 120,833 1 Budgeted Start 11/1/12 Teachers & other Professional Personnel 12.5 Start 7/15/13 85,625 6-9th Prep Teachers (12.5FTE) @ \$ 42,000 (average) (1.5 months) \$ K-5 Lead Teachers (17) @ \$ 37,500 (average) (1.5 months) \$ 79,688 17 Start 7/15/13 K-5 Apprentice Teachers (6) @ \$ 25,000 (average) (1.5 months) \$ 25,000 8 Start 7/15/13 2 Teachers (Special Ed.) @ \$45,000 (1.5 months) \$ 11,250 2 Start 7/15/13 Support Personnel \$ . 6112 - Substitutes-\$80/day, \$ 46.5 Total Salaries \$ 521,354 **Total FTEs** 6141 - Medicare - 1.45% of total salaries \$ 7,560 39,884 6141 Total 32,324 6141 - Social Security - 6.2% of total selaries 5 s 6142 - Insurance Benefits - \$500/mo "12mcs, per F-T employee (45 months in Startup Yr) 5 22,500 6143 - Worker's Compensation Insurance - 0.90% of total salaries \$ 4,692 6145 - Unemployment Compensation Insurance - 2.00% of total salaries 10,427 \$ 8146 - TRS - Reporting Entity 0.55% of total salaries \$ 2,887 6146 - TRS - New Member match 6.446% for 25% of total loacher salaries for up to 90 days s 2,926 \$ 5,793 8148 Total 6,796 8149 - Employee Bonafils - Employer 403(b) match at 2% of total non-teacher salaries \$ Total Payroll Cost (6100) 法武司法保持 Professional & Contracted Services (6200): 15,000 6211 - Legal Services \$ 8212 - Audit Services 5 12,000 Estimate per engagement letter (Attach P) CMO Services (Charter app, mrkig, payroli) 6219 - Professional Svs. \$ 100,000 For Painting and minor bidg maintenance, since rented school facility will likely need to be updated 6249 - Contracted Maintenance & Repair with minor improvements. Tenant Improvementa \$ 100,000 6259 - Utilities \$125/mo. Phone 12 5 1,500 4,000 \$ 5,500 8259 Total \$2,000/mo. Electricity 2 6269 - Rentals \$400/mo. Copler 12 4,800 5 Begin School Lease on 7/15/13. Typical operating ases include rent ebatement prior to school eginning operations, thus don't expect to be \$10,000/mo, Rent charged full \$40k monthly rate. 15.000 new facility 1.5 \$1,000/mo. Rent temp office 12 12,000 \$ 31,800 6269 Total 12 \$ 24,000 6299 - Misc. Svs.-housekeep & supplies \$2,000/mo Total Professional & Contracted Services (6200) 33 2288/3001 Supplies (6300): \$250/student 557 139,250 8321 - Textbooks tremitorne 557 6329 - Books -library \$10 each S 6,570 6339 - Testing mat. \$20/student 0 5 6399 - Other mat. \$10/student 557 5,570 8399 - Class supplies \$30/student 557 16,710 S 6399 - Computer hardware \$2,500 each 11 \$ 27,500 49,780 6399 Total \$30/student 6399 - Band/drama 0 s s Total Supplies (6300) 15 1981600 Misc. Operating Costs (6400): \$2,500 + \$200/ admin 6411 - Travel and Substitunco-Employee Only 3,700 staft 6 6429 - Insurance and Bonding Costs \$1,500 + \$20/student 557 \$ 12,840 6499 - Misc. Operating Costs s .

Misc. Operating Costs (6400) 118,340

Total Estimated Expanses >>>> \$1,110,686

# ATTACHMENT O GREAT HEARTS AMERICA – TEXAS

BUDGET FOR YEAR ONE OF OPERATION

Pages 188 - 200 Rémovers + Replaces WITH WHAT Follows PAGE 200



Application for an Open-Enrollment Charter School - Seventeenth Generation

**Budget Template Instructions** 

Instructions to complete first year (and subsequent years, if required) budget template.

1. Enter the name of the sponsoring entity.	Great Hearts America - Texas

2. Enter the name of the proposed charter school:

Great Hearts Academies - San Antonio

3. Enter the date of the fiscal year end:

4. Enter data in cells requiring a number or indicating that a description needs to be entered. Totals and subtotals will automatically calculate.

5. To complete the budget template, use the Special Supplement to Financial Accounting and Reporting Nonprofit Charter School Chart of Accounts to ensure that the account codes are used appropriately. The special supplement can be found in the School Finance Section of the TEA website.

08/31/2014

- 6. The Summary of Estimated Revenues and Expenses reports the totals entered into the revenue and expenditure by object code classification. Data does not need to be entered into the summary page.
- 7. Enter information regarding beginning net assets to be made available to the charter school in the Schedule of Estimated Net Assets at Beginning of Year. Include a description and a dollar amount for each net asset. The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 8. Enter information regarding local revenues in the Schedule of Estimated Local Revenues (object code 5700). The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 9. Enter information regarding state revenues in the Schedule of Estimated State Revenues (object code 5800)
- 10. Enter information regarding federal revenues in the Schedule of Estimated Federal Revenues (object code 5900)
- 11. Enter information regarding expenditures in the Schedule of Estimated Expenses (object code 6000)
- 12. The budget must identify all sources of funding and anticipated expenses. The revenues and expenses for each entry in the budget template must be supported with written calculations indicating how the amounts were derived. For example, 3 teachers @ \$30,000 annual salary = \$90,000 salaries or wages entered to line 6119). In addition, a reasonable planning estimate for average daily attendance (ADA) is \$6,000 per student. These written calculations should be attached following the printout of the completed budget template. 188 GreatHear
- 13. Forward a copy of the completed template including the supporting written calculations with the charter application.

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### Application for an Open-Enrollment Charter School - Seventeenth Generation Summary of Estimated Revenues and Expenses

Great Hearts America - Texas Great Hearts Academies - San Antonio

Budget for the Fiscal Year Ended		08/31/2014					
		stricted Net Assets		emporarily stricted Net Assets	Permanently Restricted Net Assets	Total N	let Assets
Net Assets at Beginning of Year	\$	6	\$	1,900,000	\$	\$	1,900,006
stimated Revenue					/		
5700 Local Sources		90,000					90,000
5800 State Sources		3,186,787		/			3,186,787
5900 Federal Sources		10,000		/			10,000
Other Sources	1	600,000	/	-600,000			0
Total Estimated Revenues	\$	3,886,787	\$	-600,000	\$	\$	3,286,787
timated Expenses:		/					
00 Payroll Costs	X	2,540,951					2,540,951
00 Professional and Contracted Services		957,179					957,179
000 Supplies and Materials	/	142,855					142,255
400 Other Operating Costs		49,740	1				49,740
500 Debt Expenses							
Other Expenses		65,000					65,000
Total Estimated Expenses	\$	3,755,125	\$		\$	\$	3,755,125
Change in Net Assets	\$	131,662	\$	-600,000	\$	\$	-468,338
et Assets at End of Year	_\$	131,668	\$	1,300,000	\$	\$	1,431,668
						/	

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### Application for an Open-Enrollment Charter School - Seventeenth Generation Schedule of Estimated Net Assets at Beginning of Year

Great Hearts America - Texas Great Hearts Academies - San Antonio

Budget for the Fiscal Year Ended		08/31/2014					
Description of Net Assets	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets			
Net Assets Carried Forward from Start-Up Phase	6	1,900,000	/	1,900,006			
Enter description here.]							
Enter description here.]							
Enter description here.]							
Enter description here.]							
Enter description here.]							
Enter description here.]							
Enter description here.]							
Enter description here.]							
Enter description here.]							
Enter description here.]							
Net Assets at Beginning of Year	<u>\$ 6</u>	\$ 1,900,000	\$	<u>\$ 1,900,006</u>			
				S			
age 3 of 12				S			

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Great Hearts America - Texas Great Hearts Academies - San Antonio

Budget for the Fiscal Year Ended

suger for the rised real Ended		08/31/2	014	
Revenue Description of Net Assets	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
5719 Local Property Taxes Passed Through By School Districts				
5729 Local Revenues Resulting from Services Rendered to Other Schools				
5741 Earnings from Permanently Restricted Net Assets and Endowments				
5742 Earnings from Temporary Deposits and Investments				
5743 Rent				
5744 Gifts and Bequests				
5749 Other Revenues from Local Sources				
[Enter description here.] [Enter description here.] [Enter description here.]				
5751 Food Service Activity				
5752 Athletic Activities	60.000			60.000
5753 Extracurricular/Cocurricular Activities Other than Attlettics	30.000			30.000
5759 Cocurricular, Enterprising Services of Activites				
[Enter description here.] [Enter description here.] [Enter description here.]				
5769 Miscellaneous Revenues from Intermediate Sources				
[Enter description here.] [Enter description here.]				
[Enter description here.]				
Total Local Revenues	\$ 90,000	\$	\$	\$ 90,000
Page 4 of 12		4		SA

09/21/2014

# Great Hearts America - Texas

Great Hearts Academies - San Antonio Budget for the Fiscal Year Ended 08/31/2014 Temporarily Permaneptly Unrestricted Net Revenue **Restricted Net Restricted Net Description of Net Assets Total Net Assets** Code Assets Assets Assets Per Capita Apportionment 5811 Foundation School Program Act Entitlements 5812 Foundation School Program Act Incentive Aid. 5813 Other Foundation School Program Act Revenues 5819 State Program Revenues Distributed by Texas Education Agency 5829 3,186,787 3,186,787 5899 State Revenues from State of Texas Government Agencies [Enter description here.] [Enter description here.] [Enter description here.] **Total State Revenues** 3,186,787 \$ 3,186,787

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### Great Hearts America - Texas Great Hearts Academies - San Antonio

Budget for the Fiscal Year Ended

Budget fo	or the Fiscal Year Ended		08/31/20	014	
Revenue Code	Description of Net Assets	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Totel Net Assets
	Federal Revenues Distributed Through Government Entities Other than State or Federal Agencie				
	[Enter description here.] [Enter description here.] [Enter description here.]				
	School Breakfast Program				
5922	National School Lunch Program	10.000			10.000
5923 1	United States Department of Agriculture (USDA) Donated Commodites				
5929 F	Federal Revenues Distributed by Texas Education Agency [Enter description here.] [Enter description here.] [Enter description here.]				
5931 \$	School Health and Related Services				
5932	Medicaid Administrative Claiming Program				
	Federal Revenues Distributed by Other State of Texas Government Agencies				]
	Federal Revenues Distributed Directly from the Federal Government [Enter description here.] [Enter description here.] [Enter description here.] otal Federal Revenues				
		<u>\$ 10,000</u>	<u>\$</u>	<u> </u>	\$ 10,000

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### Application for an Open-Enrollment Charter School - Seventeenth Generation Schedule of Net Assets at Beginning of Year

Great Hearts America - Texas Great Hearts Academies - San Antonio

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#### Budget for the Fiscal Year Ended 08/31/2014 Temporarily Permanently Unrestricted Net Description of Other Sources of Revenue **Restricted Net Restricted Net Total Net Assets** Assets Assets Assets Satisfaction of Temporary Restrictions (Timing of foundation grants) 600.000 -600.000 [Enter description here.] 600,000 \$ -600.000 \$ 22 **Total Other Sources** GreatHear

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### Great Hearts America - Texas

Great Hearts Academies - San Antonio

Budget for the Fiscal Year Ended

Budget	or the Fiscal Year Ended		08/31	/2014	/
		Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
Estimate	ed Expenses:		/		
6100	Payroll Costs				
6112	Salaries or Wages for Substitute Teachers	5,200		2	5.200
6119	Salaries or Wages Teacher and Other Professional Personnel	1,957,508			1,957,500
6121	Extra Duty Pay/Overtime - Support Personnel				
6129	Salaries or Wages for Support Personnel	35,000			35,000
6139	Employee Allowances				
6141	Social Security/Medicare	152.824			152.824
6142	Group Health and Life Insurance	288,000			288,000
6143	Workers' Compensation	17.979			17.979
6145	Unemployment Compensation	39,954			39,954
6146	Teacher Retirement/TRS Care	34,394			34.394
6149	Employee Benefits	10,100			10,100
	Total Payroll Costs	\$ 2.540.951	s	\$	\$ 2.540.951
				-	

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Great Hearts America - Texas

Great Hearts Academies - San Antonio

Budget	or the Fiscal Year Ended		08/31/2014					
		Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets			
Estimate	ed Expenses:				/			
6200	Professional and Contracted Services							
6211	Legal Services	12,000			12,000			
6212	Audit Services	5,000			5,000			
6219	Professional Services	318,679			318,679			
6221	Staff Tuition and Related Fees-Higher Education		/					
6222	Student Tuition-Public Schools							
6223	Student TuitionOther than Public Schools							
6229	Tuition and Transfer Payments	X						
6239	Education Service Center Services							
6249	Contracted Maintenance and Repair	100,000			100,000			
6259	Utilities	5,500			5.500			
6269	RentalsOperating Leases	492,000			492,000			
6299	Miscellaneous Contracted Services	24,000			24,000			
	Total Professional and Contracted Services	\$ 957,179	\$	5	<u>\$ 957.179</u>			
					GreatH			

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### Great Hearts America - Texas Great Hearts Academies - San Antonio

Budget f	or the Fiscal Year Ended		08/31/20	014	
		Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
Estimate	ed Expenses:				
6300	Supplies and Materials				
6311	Gasoline and Other Fuels for Vehicles (Including Buses)				
6319	Supplies for Maintenance and/or Operations				
6321	Textbooks	33,420			33,420
6329	Reading Materials	5,570			5,570
6339	Testing Materials	16,710			16,710
6341	Food	8,000			8,000
6342	Non-Food				
6343	Items for Sale				
6344	USDA Donated Commodities				
6349	Food Services Supplies	2,000			2,000
6399	General Supplies	76,555			76,555
	Total Supplies and Materials	\$ 142.255	\$	s	\$ 142.255
					/ .

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### Great Hearts America - Texas

Great Hearts Academies - San Antonio

Budget f	or the Fiscal Year Ended		08/31/2014					
		Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets			
Estimate	d Expenses:							
6400	Other Operating Costs							
6411	Travel and SubsistenceEmployee Only	4,100			4,100			
6412	Travel and SubsistenceStudents							
6413	StipendsNon-Employees	25,000			25,000			
6419	Travel and SubsistenceNon-Employees							
6429	Insurance and Bonding Costs	12,640			12,640			
6449	Depreciation Expense							
6494	Reclassified Transportation Expenses	X						
6499	Miscellaneous Operating Costs	8,000			8,000			
	Total Other Operating Costs	\$ 49.748	\$	\$	\$ 49,740			
6500	Debt Expense							
6521	Interest on Bonds							
6522	Capital Lease Interest							
6523	Interest on Debt							
6523	Interest Exprenses							
6529	Interest Expenses				V			
6599	Other Debt Fees							
/	Total Other Operating Costs	\$	\$	\$	5			
Page 11 c	f 12				SA			
					DEA 7			

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# Great Hearts America - Texas Great Hearts Academies - San Antonio

### Budget for the Fiscal Year Ended

Budget for the Fiscal Year Ended	08/31/2014						
	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets			
stimated Expenses:			/				
Other Expenses			/				
Extracurricular/Cocurricular Activities Other than Athletics	30,000			30,000			
Athletic Activies	35,000			35,000			
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
Total Other Expenses	\$ 65,000	\$	\$	\$ 65,000			
Total Estimated Expenses	\$ 3,690,125	\$	\$	\$ 3,690,125			



#### Supporting Calculations for the Year One Budget

Enrollment	Attendanc	-	FSP	-	FSP	1	
Year one Max.	-	80%		-	Total \$		
557	501	90%	\$6,357	5			s avg >95% ADA
Private & Foundation Grants	-			\$	600,000	All Private/F	oundation Grants
				5	3,786,787		
	-			1			1
100 - Salarles:					100.000	FTES	Notes
			Principal (12 months)	-	105,000	1	1
			Principal (12 months)		75,000	1	
Half-time K-5 Elementary (Archwa					32,500	0.5	Also teaches
			erations (12 months)	-	75,000	1	/
			ssistant (12 months)	-	37,500	0.5	/
			sistants (12 months)	-	90,000	2	/
	Anni	and the second se	Director (12 months)	-	60,000	1	/
eachers & other Professional Personnel	ASSI	stant Athletic	Director (12 months)	\$	30,000		/
	m (12 SETE) (	E 42 000 /a	verseel /1 5 menths	\$	525,000	12.5	·
			verage) (1.5 months)		637,500	17	
			verage) (1.5 months)		-		
			verage) (1.5 months)		200,000 90,000	8	
upport Personnel	Leachers (op	eeral Earl fill a	45,000 (1.5 months)	\$	50,000	V	
upport resource	1	Numa	\$35,000 (12 months)	s	25.000	1	
112 - Substitutes \$80/dex 5 developments (12)	1	Muise @	200,000 ( 12 MONINS)		35,000		
112 - Substitutes-\$80/day, 5 days/teacher (13) Total Salari				\$	1,907,700	48.5	Total CTC-
Total Salari	es			3	1,907,700	48.5	Total FTEs
	1						
At Madiana d 400 standards	-	-		1	00.007		
141 - Medicare - 1.45% of total salaries		1		1	28,967		Co 44 7-1-1
141 - Social Security - 6.2% of total salaries		1	/	S	123,857	\$ 152,824	6141 Total
142 - Insurance Benefits - \$500/mo *12mos. per F-T emp		1	-	5	288,000		
143 - Worker's Compensation Insurance - 0 90% of total :		1		\$	17,979		
145 - Unemployment Compensation Insurance - 2.00% of	total salaries			\$	39,954		
146 - TRS - Reporting Entity 0.55% of total salaries			- /	\$	10,987		
146 - TRS - New Member match 6.446% for 25% of total			days	\$	23,407	\$ 34,394	6146 Total
149 - Employee Benefits - Employer 403(b) match at 2%	of total non-tea	cher salaries		\$			
					10,100		and the second second second
			Parroll Cost (6100)		2,540,952	67%	of Total Revenue
	1	Total	Δ.	\$	2,540,952	67%	of Total Revenue
rofessional & Contracted Services (6200): 211 - Legal Services		Total Estimated p	etaine and reserve	\$ \$	2,540,952	67%	of Total Revenue
rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services		Total Estimated p First ye	etaine, and reserve ar aud to 990	\$ \$ \$	2,540,952 12,000 5,000		
rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs.		Total Estimated p First/ye CMO Service	etaine) and reserve ar aud & 990 as (10% of State Aid)	\$ \$ \$	2,540,952 12,000 5,000 318,679		of Total Revenue of State Aid
rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair		Total Estimated p Firstyre CMO Solvice	etainer and reserve ar audita 990 es (10% of State Aid) enant Improvements	\$ \$ \$ \$	2,540,952 12,000 5,000 318,679 100,000		
rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair		Total Estimated p First/ye CMO Service	etainer and reserve ar audita 990 es (10% of State Aid) enant Improvements	\$ \$ \$	2,540,952 12,000 5,000 318,679		
rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair	\$125/	Estimated p Firstyre CMO Service Tr mo. Phone	etaine) and reserve ar audits 990 es (10% of State Aid) enant Improvements 12	\$ \$ \$ \$ \$	2,540,952 12,000 5,000 318,679 100,000 1,500	10%	of State Ald
rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities	\$125/ \$2,000/mg	Total Estimated p First vice CMO Service Tri mo. Phone	etainen and reserve ear auch & 990 es (10% of State Aid) enant Improvements 12 2	\$ \$ \$ \$ \$ \$	2,540,952 12,000 5,000 318,679 100,000 1,500 4,000	10%	
rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 259 - Utilities	\$125/ \$2,000/mg	Total Estimated p First ve CMO Service Tri- mo. Phone Electricity Copier x 2	etainen and reserve ear auch & 990 es (10% of State Aid) enant Improvements 12 2	\$ \$ \$ \$ \$	2,540,952 12,000 5,000 318,679 100,000 1,500	10%	of State Ald
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Application for an Open-Enrollment Charter School - Seventeenth Generation **Budget Template Instructions** 

Instructions to complete first year (and subsequent years, if required) budget template.

1. Enter the name of the sponsoring entity.

2. Enter the name of the proposed charter school:

Great Hearts America - Texas

Great Hearts Academies - San Anlonio

#### 3. Enter the date of the fiscal year end:

- 4. Enter data in cells requiring a number or indicating that a description needs to be entered. Totals and subtotals will automatically calculate.
- 5. To complete the budget template, use the Special Supplement to Financial Accounting and Reporting Nonprofit Charter School Chart of Accounts to ensure that the account codes are used appropriately. The special supplement can be found in the School Finance Section of the TEA website.

08/31/2014

- 6. The Summary of Estimated Revenues and Expenses reports the totals entered into the revenue and expenditure by object code classification. Data does not need to be entered into the summary page.
- 7. Enter Information regarding beginning net assets to be made available to the charter school in the Schedule of Estimated Net Assets at Beginning of Year. Include a description and a dollar amount for each net asset. The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 8. Enter Information regarding local revenues in the Schedule of Estimated Local Revenues (object code 5700). The sources of all nongovernmental grants, funding and gifts must be supported by the documentation included in Attachment H.
- 9. Enter information regarding state revenues In the Schedule of Estimated State Revenues (object code 5800)
- 10. Enter information regarding federal revenues in the Schedule of Estimated Federal Revenues (object code 5900)
- 11. Enter information regarding expenditures in the Schedule of Estimated Expenses (object code 6000)
- 12. The budget must identify all sources of funding and anticipated expenses. The revenues and expenses for each entry in the budget template must be supported with written calculations indicating how the amounts were derived. For example, 3 teachers @ \$30,000 annual salary = \$90,000 salaries or wages entered to line 6119). In addition, a reasonable planning estimate for average daily attendance (ADA) is \$6,000 per student. These written calculations should be attached following the printout of the completed budget template. GreatHeart
- 13. Forward a copy of the completed template including the supporting written calculations with the charter application.

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Application for an Open-Enrollment Charter School - Seventeenth Generation Summary of Estimated Revenues and Expenses

Great Hearts America - Texas Great Hearts Academies - San Antonio

Budget for the Fiscal Year Ended

APPROVED DURING CONTINGENCY PROCESS

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		Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	t Total Net A	ssets
Net Assets at Beginning of Year	3	\$ 264,314 8	\$ 1,875,000	\$		39,314 80,006
Estimated Revenue						0.5
5700 Local Sources		Ø - <del>00,000</del> -			ý.	90,000
5800 State Sources		3,186,787			1.1 Co	86,787
5900 Federal Sources		ø -10,000-	< 434,000	7		10,000
Other Sources	+43	4,000 _690,000	_600;000		'	0
Total Estimated Revenues		\$_3,886,787	\$	\$	\$ ,3,28	36,787 3,186,787
Estimated Expenses:		3,620,787	-434,000			
6100 Payroll Costs	2,628,9	49 2,540,957			2,628,949 2,54	10.951
6200 Professional and Contracted Services	987,1	the second se		1.1	987,179 95	
6300 Supplies and Materials	132,2	A CONTRACTOR OF THE PARTY OF TH			132,255 14	
6400 Other Operating Costs	47,	10 10 10				9,740
6500 Debt Expenses	( 1)				11/-1	a la
Other Expenses	. 2	65,000			\$ -6	5,000
Total Estimated Expenses	3,796,223	\$ 3,755,125	\$ 1424100	;		5,125 3,746,223
Change in Net Assets	T1,75,4367	\$ 131,662	< 434,0207 5 -600,000 \$		\$ _46	8,338 5 (109,436)
Net Assets at End of Year	\$ 88,878	\$ 131.668	<u>\$ 1.300.000 s</u>		\$ 143	1.668
			\$ 1,441,000		\$ 1,52	9,878.
Page 2 of 12					-	SAS 536-12

RFA 701-11-108

### Application for an Open-Enrollment Charter School - Seventeenth Generation Schedule of Estimated Net Assets at Beginning of Year

Great Hearts America - Texas Great Hearts Academies - San Antonio

### Budget for the Fiscal Year Ended

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budget for the Fiscal feat Ended		08/31/2014					
Description of Net Assets	Unrestricted Net Assets	Temporarily Restricted Net	Permanently Restricted Net Assets	Total Net Assets			
Net Assets Carried Forward from Start-Up Phase	264,314 8	19,5000		1,980,006	2,139,314		
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
[Enter description here.] [Enter description here.] [Enter description here.] [Enter description here.] [Enter description here.] [Enter description here.] Net Assets at Beginning of Year	\$ 8	s 1.900,000	\$	\$ 1,900,006	-		
	264,314	1,875,000		2,139,314			
	5				ureatheans		
	< PR				He		
	OCE				B		
	SS						
Page 3 of 12				SA	S 26-12		
				RFA 70	1-11-108		

Great Hearts America - Texas Great Hearts Academies - San Antonio

**Budget for the Fiscal Year Ended** 08/31/2014 Temporarily Permanently Revenue **Unrestricted Net Description of Net Assets Total Net Assets Restricted Net Restricted Net** Code Assets Assats Assets 5719 Local Property Taxes Passed Through By School Districts Local Revenues Resulting from Services Rendered to Other Schools 5729 Earnings from Permanently Restricted Net Assets and Endowments 5741 5742 Earnings from Temporary Deposits and Investments 5743 Rent 5744 Gifts and Bequests 5749 Other Revenues from Local Sources [Enter description here.] [Enter description here.] [Enter description here.] 5751 Food Service Activity 5752 Athletic Activities 69.000 Ó 5753 Extracurricular/Cocurricular Activities Other than Attlettics ø 30.000 5759 Cocurricular, Enterprising Services or Activites [Enter description here.] [Enter description here.] [Enter description here.] 5769 Miscelianeous Revenues from Intermediate Sources [Enter description here.] [Enter description here.] [Enter description here.] \$ \$ 90,000 \$ **Total Local Revenues** ŝ

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SAS 536-12 RFA 701-11-108

\$ 90,000

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60.000

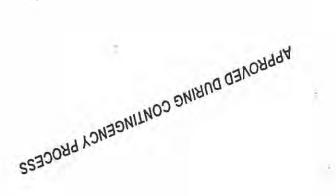
30.000

APPROVED DURING CONTINGENCY PROCESS

### Great Hearts America - Texas Great Hearts Academies - San Antonio

### Budget for the Fiscal Year Ended

Revenu Code	L'escription of Net Assets	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
5811	Per Capita Apportionment				
5812	Foundation School Program Act Entitlements				
5813	Foundation School Program Act Incentive Ald				
5819	Other Foundation School Program Act Revenues			1	
5829	State Program Revenues Distributed by Texas Education Agency	2 3,186,787			3,186,787
5899	State Revenues from State of Texas Government Agencies				
	[Enter description here.]				1
	[Enter description here.]				
	[Enter description here.]				
	Total State Revenues	<u>\$ ~ 3,186,787</u>	\$	\$	\$ 3,186,787



08/31/2014

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APPROVED DURING CONTINGENCY PROCESS

Great Hearts America - Texas

Great Hearts Academies - San Antonio

Budget	for the Fiscal Year Ended	08/31/2014					
Revenue Code	e Description of Net Assets	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets		
	Federal Revenues Distributed Through Government Entities Other than State or Federal Agencie						
	[Enter description here.] [Enter description here.] [Enter description here.]						
	School Breakfast Program						
5922 N	National School Lunch Program	\$ 19.000			\$ 10.00		
5923 L	United States Department of Agriculture (USDA) Donated Commodites				10.001		
	Federal Revenues Distributed by Texas Education Agency						
	[Enter description here.] [Enter description here.] [Enter description here.]						
	School Health and Related Services						
5939 F	Medicaid Administrative Claiming Program Federal Revenues Distributed by Other State of Texas Government Agencies						
5949 F	Federal Revenues Distributed Directly from the Federal Government						
	[Enter description here.] [Enter description here.] [Enter description here.] Datal Federal Revenues	\$ 10,000 S					

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Application for an Open-Enroliment Charter School - Seventeenth Generation Schedule of Net Assets at Beginning of Year

Great Hearts America - Texas Great Hearts Academies - San Antonio

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Budget for the Fiscal Year Ended	08/31/2014			
Description of Other Sources of Revenue	Unrestricted Net Assets	Temporarity Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
Satisfaction of Temporary Restrictions (Timing of foundation grants)	698,000	690,000		
[Enter description here.] Brackensidge Foundation [Enter description here.] Ewing Halsell Foundation	100,000	<100,000	>	Ø
[Enter description here.] Ewing Halsell Foundation	334.000	(334,000)		*
Enter description here.]				
Enter description here.]				
Enter description here.]				
Enter description here.]				
Enter description here.]				
Enter description here.}				
Enter description here.]				
Enter description here.]				
Enter description here.]			77. <b>1990</b>	1
otal Other Sources	\$ 600.000	<u> </u>	\$	\$ v . 0
[Enter description here.]         Total Other Sources         age 7 of 12	434,000	< <u>434,0007</u>		<u>\$. \. 0</u>
age 7 of 12		0		

SAS 535-12 RFA 701-11-108

APPROVED DURING CONTINGENCY PROCESS

08/31/2014

### Great Hearts America - Texas Great Hearts Academies - San Antonio

### Budget for the Fiscal Year Ended

			Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets	
stimate	ed Expenses:						
6100	Payroli Costs '						
6112	Salaries or Wages for Substitute Teachers		- 5,200			5,200	5030 00
5119	Salaries or Wages Teacher and Other Professiona	al Personnel	>1,957,500			1,957,500	-2,070,200
6121	Extra Duty Pay/Overtime - Support Personnel	2,070,200				4	
6129	Salaries or Wages for Support Personnel	78.101.	/ 35,000			35,000	
139	Employee Allowances						
141	Social Security/Medicare	158,370	152,824			152,824	158,370
142	Group Health and Life Insurance	294,000				288,000	294,000
143	Workers' Compensation	18,632				17,979	18,632
145	Unemployment Compensation	41,404				39,954	41,404
146	Teacher Retirement/TRS Care	34,793	34,394			34,394	34,793
6149	Employee Benefits	11,550	10,100			10,100	11,550
	Total Payroll Costs	2,628,949		\$	\$	\$ 2.540.951	2,628,94
	*					-	

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Great Hearts America - Texas Great Hearts Academies - San Antonio

#### Budget for the Fiscal Year Ended

08/31/2014

APPROVED DURING CONTINGENCY PROCESS

		Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Totai Net Assets
stimated	d Expenses:				
200	Professional and Contracted Services				
211	Legal Services	12,000			12,000
212	Audit Services	15,000 5,000			15,000-5,000
219	Professional Services	318,679			318,679
221	Staff Tuition and Related Fees-Higher Education				
222	Student TuitionPublic Schools				
223	Student Tuition-Other than Public Schools				
229	Tuition and Transfer Payments				1.000.000.000
239	Education Service Center Services				
249	Contracted Maintenance and Repair	100,000			100,000
259	Utilities	25,500 5,500	-		25,500 5,500
269	Rentals-Operating Leases	492,000			492,000
299	Miscellaneous Contracted Services	24,000			24,000
	Total Professional and Contracted Services	\$ 957.179	s	\$	\$ 957.179
		987,179			987,179

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Great Hearts America - Texas Great Hearts Academies - San Antonio

# Budget for the Fiend Veer Ended

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Budget fo	or the Fiscal Year Ended		08/31/2	014	
	131	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets
stimated	d Expenses:				
5300	Supplies and Materials				
5311	Gasoline and Other Fuels for Vehicles (Including Buses)				
319	Supplies for Maintenance and/or Operations				
321	Textbooks	33,420			33,420
329	Reading Materials	5,570			5,570
339	Testing Materials	16,710			16,710
341	Food 4P	\$ 8,000			2 8,000
342	Non-Food				
343	Items for Sale				
344	USDA Donated Commodities				
349	Food Services Supplies	Ø 2,000			1 2,000
399	Food Non-Food Items for Sale USDA Donated Commodities Food Services Supplies General Supplies Total Supplies and Materials	76,555			76,555
	Total Supplies and Materials	\$ 142.255	S	\$	\$ 142.255
	VTIA	132,255			132,255
	IGE				7
	NC				
	YP				2
	Ro				
÷	DES				
10 of					

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Great Hearts America - Texas Great Hearts Academies - San Antonio

Budget	for the Fiscal Year Ended		08/31/2014					
		Unrestricted Net Assets	Temporarity Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets			
Estimat	ed Expenses:							
6400	Other Operating Costs							
6411	Travel and Subsistence-Employee Only	4,200 4,100			4,200 4,100			
6412	Travel and Subsistence-Students	23.000			23,000			
6413	Stipends-Non-Employees	\$ 25,000			0 25,000			
6419	Travel and Subsistence-Non-Employees							
6429	Insurance and Bonding Costs	12,640			12,640			
6449	Depreciation Expense							
6494	Reclassified Transportation Expenses							
6499	Miscellaneous Operating Costs	8,000			8,000			
	Total Other Operating Costs	- FIELD .	\$	5	\$ 49.740			
6500	Debt Expense	47,840			47,840			
6521	Interest on Bonds							
6522	Capital Lease Interest							
6523	Interest on Debt	<u> </u>						
6523	Interest Exprenses							
6529	Interest Expenses							
6599	Other Debt Fees							
	Total Other Operating Costs	\$	\$	s	\$			

APPROVED DURING CONTINGENCY PROCESS

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### Great Hearts America - Texas Great Hearts Academies - San Antonio

### Budget for the Fiscal Year Ended

Budget for the Fiscal Year Ended	08/31/2014						
	Unrestricted Net Assets	Temporarily Restricted Net Assets	Permanently Restricted Net Assets	Total Net Assets			
Estimated Expenses:	7						
Other Expenses							
Extracurricular/Cocurricular Activities Other than Athletics	\$ 30,000			0 30,000			
Athletic Activies	0 35,000			\$ 35,000			
[Enter description here.]							
[Enter description here.]							
[Enter description here.]							
Total Other Expenses	\$ 0 .65:000	\$	\$	\$ 0 .65,000			
Total Estimated Expenses	\$ 3,690,125	\$	\$	\$ 3,690,125			
	3,796,223			3,796,223			



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### APPROVED DURING CONTINGENCY PROCESS

#### Supporting Calculations for the Year One Budget

Enrollment	Attendance		FSP	-	FBP		
Year one Max.		80%			Total \$		
557	501	90%	\$8,357	\$	3,186,787		ols avg >96% AD/
Private & Foundation Grants				\$	800,000	All Private	Foundation Gran
				L.	S. ( ) (		
	_			1			
100 - Salaries:	1			-		FTEs	Notes
			rincipal (12 months)		105,000	1	
			rincipal (12 months)		75,000	1	a farmer a
Half-time K-5 Elementary (Arct	Contraction of the local division of the loc	and the second se	No. of Concession, name of		32,500	0.5	Also teaches
		the second s	erations (12 months)	the second second	75,000	1	
		and the second s	salstant (12 months)	-	37,500	0.6	
		and the second se	alatants (12 months)	-	90,000	2	
		the second s	Director (12 months)	_	80,000	1	
*	Asal	stant Athletic	Director (12 months)	\$	30,000	1	
achers & other Professional Personnel				1			+:
			verage) (1.6 months)	\$	525,000	12.5	
			verage) (1.5 months)		637,500	17	
K-8 Apprentik			(arage) (1.5 months)		200,000	8	
	2 Teachers (Sp	ecial Ed.) @ \$	45,000 (1.5 months)	\$	90,000	2	
upport Personnel	1997 - Series - Serie	-		_			
		Nurse @	\$35,000 (12 months)	-	35,000	1	
112 - Substitutes-\$80/day, 5 days/teacher (13)				\$	6,200		_
Total Sal	arias		1999 - A.	\$	1,997,700	48.5	Total FTES
	in the second						
141 - Medicare - 1.45% of total salaries				5	28,967	1.1.1	
141 - Social Security - 6.2% of total salaries				\$	123,857	\$ 152,82	24 8141 Total
142 - Insurance Benefits - \$600/mo *12mos. per F-T e	mployee x 48	- 1. m - 2. m		\$	288,000		
143 - Worker's Compensation Insurance - 0.90% of tot	tal salarles			\$	17,979		
				-			
145 - Unemployment Compensation Insurance - 2.00%	of total salaries	1		15	39,954		
145 - Unemployment Compensation Insurance - 2.00% 148 - TRS - Roporting Entity 0.65% of total salaries	of total salaries			\$ 5	39,954 10,987		
the second se		es for up to 90	daya	_	10,987	\$ 34,31	94 6146 Total
146 - TRS - Reporting Entity 0.65% of total salaries 146 - TRS - New Member match 6.446% for 25% of to	tal teacher salade	acher salaries		5 5	10,987 23,407 10,100	\$ 34,31	94 6146 Total
148 - TRS - Roporting Entity 0.55% of total salaries	tal teacher salade	acher salaries		5 5	10,987 23,407 10,100	1	94 6146 Total 7% of Total Reven
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 6.446% for 25% of to 149 - Employee Benefits - Employer 403(b) match at 2	tal teacher salade	acher salaries	the second se	5 5	10,987 23,407 10,100	1	
148 - TRS - Roporting Entity 0.65% of total salaries 145 - TRS - New Member match 5.446% for 25% of to 149 - Employee Banefits - Employer 403(b) match at 2 rofessional & Contracted Services (6200):	tal teacher salade	acher salarles Total	Payroll Cost (6100)	5 5 5	10,987 23,407 10,100 245(0023	1	
148 - TRS - Roporting Entity 0.65% of total salaries 145 - TRS - New Member match 8.446% for 25% of to 149 - Employee Banefits - Employer 403(b) match at 2 rofessional & Contracted Services (6200): 211 - Legal Services	tal teacher salade	Total Estimated 1	Payroll Cost (6100) stainer and reserve	5 5 5 5	10,987 23,407 10,100 12,5(0,0)20 12,000	1	
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services	tal teacher salade	Total Total Estimated r	Payroll Cost (6100) etainer and reserve ear audit & 990	8 8 8	10,987 23,407 10,100 12,540,053 12,000 12,000 5,000	67	7% of Total Raven
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 trofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs.	tal teacher salade	Total Total Estimated r First ye CMO Service	Payroll Cost (6100) stainer and reserve ser audit & 990 as (10% of State Ald)	5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,670,989 12,000 5,000 318,679	67	
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 trofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair	tal teacher satarte % of total non-tea	Acher salaries Total Estimated r First ye CMO Service T	Payroll Cost (6100) etainer and reserve ear audit & 990 as (10% of State Ald) enant Improvementa	5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,640,953 12,000 5,000 318,679 100,000	67	7% of Total Raven
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 trofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair	tal teacher satarte % of total non-tea	Total Total Estimated r First ye CMO Service	Payroll Cost (6100) etainer and reserve ear audit & 990 as (10% of State Ald) enant Improvementa	5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,670,989 12,000 5,000 318,679	67	7% of Total Raven
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services	tal teacher satarte % of total non-tea 5128	Total Total Estimated r First yr CMO Service T Vimo. Phone	Payroll Cost (6100) etainer and raserve ear audit & 990 as (10% of State Ald) enant Improvements 12	5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,640,653 12,000 5,000 318,679 100,000 1,500	67	7% of Total Reven 0% of State Ald
148 - TRS - Roporting Entity 0.65% of total sataries 148 - TRS - New Member match 6.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities	tal teacher satarte % of total non-tea 5125 \$2,000/m	Total Total Estimated r First yr CMO Service T Vimo. Phone o. Electricity	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Ald) enant improvements 12	5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,600,621 12,000 5,000 318,679 100,000 1,500 4,000	67	7% of Total Raven
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 trofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair	tal teacher satarte % of total non-tea \$125 \$2,000/m \$500/mo	Total Total Estimated r First yr CMO Service T Vimo. Phone o. Electricity o. Copier x 2	Payroll Cost (6100) etainer and raserve ear audit & 990 as (10% of State Ald) enant Improvements 12	5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,640,653 12,000 5,000 318,679 100,000 1,500	67	7% of Total Reven 0% of State Ald
148 - TRS - Roporting Entity 0.65% of total sataries 148 - TRS - New Member match 6.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities	tal teacher salarte % of total non-tea \$125 \$2,000/m \$500/mo \$40,000/	Acher salaries Total Estimated i First yr CMO Service TWMO. Phone O. Electricity Copier x 2 mo. Rent -	Payroll Cost (6100) etainer and reserve ser audit & 990 ss (10% of State Ald) enant Improvementa 12 2 12	8 3 3 3 3 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,640,662 12,000 318,679 100,000 1,500 4,000 12,000	67 10 \$ 5,5	7% of Total Raveni 0% of State Ald 00 8259 Total
148 - TRS - Roporting Entity 0.65% of total sataries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 trofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 209 - Rentals	tal teacher satarte % of total non-tea \$125 \$2,000/mi \$500/mo \$40,000// Itaav	acher salaries Total Estimated r First yr CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent - facility	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Ald) enant improvements 12	8 3 3 3 3 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,600,621 12,000 5,000 318,679 100,000 1,500 4,000	67 10 \$ 5,5	7% of Total Reven 0% of State Ald
148 - TRS - Roporting Entity 0.65% of total sataries 148 - TRS - New Member match 6.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities	tal teacher satarte % of total non-tea \$128 \$2,000/mi \$500/mo \$40,000/ naw \$1,000/n	Acher salaries Total Estimated i First yr CMO Service TWMO. Phone O. Electricity Copier x 2 mo. Rent -	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Ald) enant Improvements 12 2 12 12	8 3 3 3 3 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,640,662 12,000 318,679 100,000 1,500 4,000 12,000	5 5 5 1:	7% of Total Raveni 0% of State Ald 00 8259 Total
148 - TRS - Roporting Entity 0.65% of total sataries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 trofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 209 - Rentals	tal teacher satarte % of total non-tea \$128 \$2,000/mi \$500/mo \$40,000/ naw \$1,000/n	Acher salaries Total Estimated r First yr CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent - facility nc. Rent -	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Aid) enant Improvements 12 2 12 12	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000	5 5 5 1:	7% of Total Ravens 0% of Stata Akd 00 6259 Total 5% of Stata Akd
148 - TRS - Roporting Entity 0.65% of total salaries 145 - TRS - New Member match 6.446% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 269 - Utilities 269 - Rentals 209 - Misc. Svshousekcep & supplies	tal teacher satarte % of total non-tea \$125 \$2,000/m \$500/mo \$40,000/ new \$1,000/n temp	Acher salaries Total Estimated r First y CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent- facility o. Rent- o. Rent- o. Rice \$2,000/mo.	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Aid) enant Improvements 12 2 12 12		10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000	67 1( \$ 5,5 1) \$ 492,0	7% of Total Ravens 0% of Stata Akd 00 6259 Total 5% of Stata Akd
148 - TRS - Roporting Entity 0.65% of total salaries 145 - TRS - New Member match 6.446% for 25% of to 149 - Employee Banefits - Employer 403(b) match at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 269 - Rentals 209 - Masc. Svshousekcep & supplies	tal teacher satarte % of total non-tea \$125 \$2,000/m \$500/mo \$40,000/ new \$1,000/n temp	Acher salaries Total Estimated r First y CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent- facility o. Rent- o. Rent- o. Rice \$2,000/mo.	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Ald) enant Improvementa 12 2 12 12 12 0 12		10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000	67 1( \$ 5,5 1) \$ 492,0	7% of Total Ravens 0% of Stata Akd 00 6259 Total 5% of Stata Akd
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.448% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 trofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 209 - Rentals 209 - Mitsc. Svshousekcep & supplies	tal teacher satarte % of total non-tea \$128 \$2,000/mi \$500/mo \$40,000/ naw \$1,000/n tamp Total Profession	Acher salaries Total Estimated r First y CMO Service T Vmo. Phone o. Electricity o. Copier x 2 mo. Rent- facility nc. Rent- o office \$2,000/mo. nal & Contrac	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Ald) enant Improvementa 12 2 12 12 12 0 12		10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000	67 1( \$ 5,5 1) \$ 492,0	7% of Total Ravens 0% of Stata Akd 00 6259 Total 5% of Stata Akd
148 - TRS - Roporting Entity 0.65% of total salaries 145 - TRS - New Member match 6.446% for 25% of to 149 - Employee Banefits - Employer 403(b) match at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 269 - Rentals 209 - Masc. Svshousekcep & supplies	tal teacher satarte % of total non-tes \$125 \$2,000/m \$500/m \$40,000/ naw \$1,000/n tamp Total Profession \$80/s	Acher salaries Total Estimated r First y CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent- facility o. Rent- o. Rent- o. Rice \$2,000/mo.	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Ald) enant Improvementa 12 2 12 12 12 0 12		10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000	67 1( \$ 5,5) 1) \$ 492,0	7% of Total Ravens 0% of Stata Akd 00 6259 Total 5% of Stata Akd
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 8.446% for 25% of to 149 - Employee Benefits - Employer 403(b) match at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 209 - Rentals 209 - Mac. Svshousekcep & supplies upplies (6300):	tal teacher salarte % of total non-tea \$125 \$2,000/m \$500/mo \$40,000/ naw \$1,000/n tamp Total Profession \$80/s enro	Acher salaries Total Estimated r First y CMO Service Trivino. Phone o. Electricity o. Copier x 2 mo. Rent- facility no. Rent- facility no. Rent- sofice \$2,000/mo. nal & Contra	Payroll Cost (6100) etainer and reserve eer audit & 990 as (10% of State Ald) enant Improvementa 12 2 12 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,640,954 12,000 318,679 100,000 1,500 4,000 12,000 480,000 - 24,000	67 1( \$ 5,5) 1) \$ 492,0	7% of Total Reven 0% of State Ald 00 6259 Total 5% of State Ald 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 6.446% for 25% of to 149 - Employee Benefits - Employer 403(b) metch at 2 tofesational & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 269 - Rentals 299 - Misc. Svshousekcep & supplies upplies (6300): 321 - Textbooks	tal teacher salade % of total non-tes \$125 \$2,000/m \$500/mo \$40,000/ naw \$1,000/n temp Total Profession \$80/s enro \$10	Acher salaries Total Estimated r First y CMO Service Trivino. Phone o. Electricity o. Copier x 2 mo. Rent- facility no. Rent- facility no. Rent- office \$2,000/mo. nal & Contra	Paynoll Cost (6100) etainer and reserve ser audit & 990 ss (10% of State Ald) enant Improvements 12 2 12 12 12 12 12 12 12 12 12 12 12 1		10,987 23,407 10,100 12,000 318,679 100,000 1,500 4,000 12,000 480,000 - 24,000 33,420	67 1( \$ 5,5) 1: \$ 492,0 Most texts	7% of Total Reven 0% of State Ald 00 6259 Total 5% of State Ald 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries 145 - TRS - New Member match 6.446% for 25% of to 149 - Employee Benefits - Employer 403(b) match at 2 tofesational & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 209 - Nitsc. Svshousekeep & supplies 400 - Mitsc. Svshousekeep & supplies 400 - Mitsc. Svshousekeep & supplies 401 - Textbooks 329 - Books -library	tal teacher salade % of total non-tes \$125 \$2,000/m \$500/mo \$40,000/ naw \$1,000/n temp Total Profession \$80/s enro \$10	acher salaries Total Estimated r First yr CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent - facility no. Rent - facility no. Rent - office office student ilment each \$30/student	Payroll Cost (6100) etainer and reserve per audit & 990 as (10% of State Ald) enant Improvements 12 12 12 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,640,982 12,000 318,679 100,000 1,500 4,000 12,000 480,000 - 24,000 33,420 5,570	67 1( \$ 5,5) 1: \$ 492,0 Most texts	7% of Total Reven 0% of State Ald 00 6259 Total 5% of State Ald 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Banefits - Employer 403(b) match at 2         trofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         209 - Rentals         209 - Mac. Svshousekcep & supplies         320 - Mac. Svshousekcep & supplies         321 - Textbooks         329 - Books -library         339 - Testing mat.         399 - Other mat.	tal teacher salade % of total non-tes \$125 \$2,000/m \$500/mo \$40,000/ naw \$1,000/n temp Total Profession \$80/s enro \$10	Acher salaries Total Estimated r First yr CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent - facility no. Rent - facility no. Rent - facility no. Rent - office (\$2,000/mo. nal & Contra student ilment eech \$30/student	Payroll Cost (6100) etainer and reserve per audit & 990 as (10% of State Aid) enant Improvements 12 12 12 12 12 12 12 12 12 12 12 12 12	8 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,640,982 12,000 318,679 100,000 1,500 4,000 12,000 480,000 - 24,000 33,420 5,570	67 10 \$ 5,50 11 \$ 492,0 Most texts	7% of Total Reven 0% of State Ald 00 6259 Total 5% of State Ald 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 8.446% for 25% of to         149 - Employee Banefits - Employer 403(b) match at 2         trofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         209 - Rentals         209 - Rentals         211 - Textbooks         320 - Books -library         339 - Testing mail.         399 - Other mat.         399 - Class supplies	tal teacher satarte % of total non-tea \$125 \$2,000/mi \$500/mo \$40,000/ navi \$1,000/n tamp Total Profession \$860/s enro \$10	Acher salaries Total Estimated r First y CMO Service T CMO Service T Second Sec	Payroll Cost (6100) etainer and reserve per audit & 990 as (10% of State Ald) enant Improvements 12 12 12 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000 24,000 24,000 33,420 6,570 16,710	67 10 \$ 5,5 1: \$ 492,0 Most texts	7% of Total Reven 0% of State Ald 00 6259 Total 5% of State Ald 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Banefits - Employer 403(b) match at 2         trofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         209 - Rentals         209 - Mac. Svshousekcep & supplies         320 - Mac. Svshousekcep & supplies         321 - Textbooks         329 - Books -library         339 - Testing mat.         399 - Other mat.	tal teacher satarte % of total non-tea \$125 \$2,000/mi \$500/mo \$40,000/ navi \$1,000/n tamp Total Profession \$860/s enro \$10	Acher salaries Total Estimated r First yr CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent - facility no. Rent - facility no. Rent - facility no. Rent - office (\$2,000/mo. nal & Contra student ilment eech \$30/student	Payroll Cost (6100) etainer and reserve per audit & 990 as (10% of State Aid) enant Improvements 12 12 12 12 12 12 12 12 12 12 12 12 12	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000 24,000 24,000 5,570 16,710 13,926	67 10 \$ 5,5 11 \$ 492,0 Most texts	7% of Total Reven 0% of State Ald 00 6259 Total 5% of State Ald 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Banefits - Employer 403(b) match at 2         rofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         269 - Rentals         209 - Masc. Svshousekcep & supplies         upplies (6300):         321 - Textbooks         329 - Books -library         339 - Testing mail.         399 - Other mat.         399 - Class alupplies	tal teacher satarte % of total non-tea \$125 \$2,000/mi \$500/mo \$40,000/ navi \$1,000/n tamp Total Profession \$860/s enro \$10	Acher salaries Total Estimated r First y CMO Service T CMO Service T Second Sec	Payroll Cost (6100) etainer and reserve per audit & 990 as (10% of State Aid) enant Improvements 12 12 12 12 12 12 12 12 12 12 12 12 12	5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000 24,000 24,000 5,570 16,710 13,926 33,420	67 10 \$ 5,5 1: \$ 492,0 Most texts	7% of Total Reven 0% of State Ald 00 6259 Total 5% of State Ald 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Banefits - Employer 403(b) match at 2         rofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         209 - Rentals         209 - Rentals         211 - Textbooks         329 - Books -library         339 - Testing mail.         399 - Other mat.         399 - Computer hard/ware	tal teacher satarte % of total non-tea \$125 \$2,000/mi \$500/mo \$40,000/ navi \$1,000/n tamp Total Profession \$860/s enro \$10	Acher salaries Total Estimated r First y CMO Service T Wmo. Phone o. Electricity o. Copier x 2 mo. Rent- facility no. Rent- facility no. Rent- office \$2,000/mo. nal & Contrac \$2,000/mo. nal & Contrac \$2,000/mo. student iliment sach \$30/student \$20/student \$2,000 each	Payroll Cost (6100) etainer and reserve per audit & 990 as (10% of State Aid) enant Improvements 12 12 12 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 5,000 318,679 100,000 1,500 4,000 12,000 480,000  24,000 33,420 6,570 16,710 13,926 33,420 12,500	67 10 \$ 5,5 1: \$ 492,0 Most texts	7% of Total Raven 0% of State Aki 00 6259 Total 5% of State Aki 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Banefits - Employer 403(b) match at 2         rofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         209 - Rentals         209 - Rentals         211 - Textbooks         329 - Books -library         339 - Testing mail.         399 - Other mat.         399 - Computer hard/ware	tal teacher satarte % of total non-tea \$125 \$2,000/mi \$500/mo \$40,000/ navi \$1,000/n tamp Total Profession \$860/s enro \$10	acher salarles Total Estimated i First yr CMO Service CMO Service To CMO Service To CMO Service To CMO Service To CMO Service To Service Service To Service To Service Se	Payroll Cost (6100) etainer and reserve ear audit & 990 as (10% of State Aid) enant Improvements 12 12 12 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 5,000 318,579 100,000 1,500 4,000 12,000 480,000 - 24,000 33,420 6,570 16,710 13,826 33,420 12,500 16,710	67 10 \$ 5,5 11 \$ 492,0 Most texts	7% of Total Raven 0% of State Aki 00 6259 Total 5% of State Aki 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Benefits - Employer 403(b) match at 2         rofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         269 - Willities         209 - Mitsc. Svshousekcep & supplies         upplies (6300):         321 - Textbooks         322 - Books -library         339 - Testing mst.         399 - Other mat.         399 - Computer hardware         399 - Band/drame	tal teacher satarte % of total non-tea \$125 \$2,000/mi \$500/mo \$40,000/ navi \$1,000/n tamp Total Profession \$860/s enro \$10	acher salarles Total Estimated i First yr CMO Service CMO Service To CMO Service To CMO Service To CMO Service To CMO Service To Service Service To Service To Service Se	Payroll Cost (6100) etainer and reserve ser audit & 990 to as (10% of State Ald) enant Improvements 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 5,000 318,579 100,000 1,500 4,000 12,000 480,000 - 24,000 33,420 6,570 16,710 13,826 33,420 12,500 16,710	67 10 \$ 5,5 11 \$ 492,0 Most texts	7% of Total Raven 0% of State Aki 00 6259 Total 5% of State Aki 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 8.446% for 25% of to         149 - Employee Banefits - Employer 403(b) match at 2         trofessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         269 - Rentals         209 - Masc. Svshousekcep & supplies         upplies (6300):         321 - Textbooks         329 - Books -library         339 - Testing mail.         399 - Other mat.         399 - Computer hardware	tal teacher salade % of total non-tea \$125 \$2,000/m \$500/mo \$40,000/ naw \$1,000/n tamp Total Profession \$80/s enro \$10	Acher salarles Total Estimated I First yr CMO Service Total CMO Service Total CMO Service Total CMO Service Total CMO Service Total CMO Service Total CMO Service Total CMO Service Total CMO Service Total CMO Service Total Service Total CMO Service Total Service Total CMO Service Total CMO Service Total CMO Service Total Service Total Service Total CMO Service Total CMO Service Total Service Total Service Total Service Total Service Total Service Total Total Service Total Service Total Service Total Service Servi	Payroll Cost (6100) etainer and reserve ser audit & 990 to as (10% of State Ald) enant Improvements 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 5,000 318,579 100,000 1,500 4,000 12,000 480,000 - 24,000 33,420 6,570 16,710 13,826 33,420 12,500 16,710	67 10 \$ 5,5 11 \$ 492,0 Most texts	7% of Total Raven 0% of State Aki 00 6259 Total 5% of State Aki 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries 148 - TRS - New Member match 6.446% for 25% of to 149 - Employee Benefits - Employer 403(b) match at 2 rofessional & Contracted Services (6200): 211 - Legal Services 212 - Audit Services 219 - Professional Svs. 249 - Contracted Maintenance & Repair 260 - Utilities 269 - Rentals 209 - Misc. Svshousekcep & supplies 321 - Textbooks 329 - Books -library 339 - Testing mat. 309 - Other mat. 309 - Other mat. 309 - Class supplies 309 - Computer hardware 309 - Band/drame Ilsc. Operating Costs (6400):	tal teacher salade % of total non-tea \$125 \$2,000/m \$500/mo \$40,000/ naw \$1,000/n tamp Total Profession \$80/s enro \$10	acher salarles Total Estimated i First yr CMO Service CMO Service Triffic yr CMO Service Triffic yr Copier x 2 mo. Rent - facility no. Rent - facility so office student illment sech s30/student \$20/student \$30/student	Payroll Cost (6100) etainer and raserve par sudit & 990 as (10% of State Ald) enant Improvements 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 318,679 100,000 1,500 4,000 12,000 480,000 24,000 33,420 5,570 16,710 13,926 33,420 12,500 16,710	67 1( \$ 5,5) 1) \$ 492,0 Most texts \$ 76,5	7% of Total Raven 0% of State Aki 00 6259 Total 5% of State Aki 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Benefits - Employer 403(b) match at 2         170fessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         209 - Misc. Svshousekcep & supplies         209 - Misc. Svshousekcep & supplies         209 - Misc. Svshousekcep & supplies         320 - Books -library         339 - Teating mail.         309 - Other mat.         309 - Class supplies         309 - Bondy Flore         309 - Bondy Flore         309 - Band/drame         Iisc. Operating Costs (8400):         411 - Travel and Substitence–Employee Only	tal teacher salade % of total non-tea \$128 \$2,000/m \$500/m \$40,000/ new \$1,000/n tamp Total Profession \$40,000/ new \$1,000/n tamp Total Profession \$10 \$10 \$10 \$10 \$10 \$10 \$10 \$10 \$10 \$10	acher salarles Total Estimated i First yr CMO Service CMO Service Tymo. Phone o. Electricity o. Copier x 2 mo. Rent- facility no. Rent- facility no. Rent- office \$2,000/mol nal & Contrai student liment each \$30/student \$25/student \$26/student \$26/student \$20/student \$20/student	Payroll Cost (6100) etainer and reserve per sudit & 990 as (10% of State Ald) enant Improvements 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 318,679 100,000 1,500 4,000 12,000 480,000 24,000 24,000 33,420 6,570 16,710 13,926 33,420 12,500 16,710	67 10 \$ 5,5 11 \$ 492,0 Most texts	7% of Total Raven 0% of State Aki 00 6259 Total 5% of State Aki 00 6269 Total
148 - TRS - Roporting Entity 0.65% of total salaries         148 - TRS - New Member match 6.446% for 25% of to         149 - Employee Benefits - Employer 403(b) metch at 2         170fessional & Contracted Services (6200):         211 - Legal Services         212 - Audit Services         219 - Professional Svs.         249 - Contracted Maintenance & Repair         260 - Utilities         209 - Misc. Svshousekcep & supplies         209 - Misc. Svshousekcep & supplies         321 - Textbooks         329 - Books -library         339 - Testing mat.         399 - Other mat.         399 - Other mat.         399 - Band/drame         199 - Band/drame         190 - Computer hardware         399 - Band/drame	tal teacher salade % of total non-tea \$128 \$2,000/m \$500/m \$40,000/ new \$1,000/n tamp Total Profession \$40,000/ new \$1,000/n tamp Total Profession \$10 \$10 \$10 \$10 \$10 \$10 \$10 \$10 \$10 \$10	acher salarles Total Estimated I First yr CMO Service CMO Service Trivino. Phone o. Electricity b. Copier x 2 mo. Rent- facility mo. Rent- facility mo. Rent- facility mo. Rent- facility mo. Rent- facility mo. Rent- facility mo. Rent- soffice (\$2,000/mo) mail & Contrat student liment sach \$30/student \$25/student \$20/student \$20/student	Payroll Cost (6100) etainer and reserve per sudit & 990 as (10% of State Ald) enant Improvements 12 12 12 12 12 12 12 12 12 12		10,987 23,407 10,100 12,000 318,679 100,000 1,500 4,000 12,000 480,000 24,000 33,420 5,570 16,710 13,926 33,420 12,500 16,710	67 10 \$ 5,50 11 \$ 492,0 Most texts	7% of Total Raven 0% of State Aki 00 6259 Total 5% of State Aki 00 6269 Total

Misc. Operating Costs (6400)



Total Estimated Expenses >>>> \$ 3,655,125 Excludes Extre-curriculars which net \$0

#### Supporting Calculations for the Year One Budget

Enroliment	Allendance	-	FSP	_	FSP fotal \$	-
Year one Mar. 567	501	80%	\$8,357			GHA schools avg >95% ADA
Surplus Carried over from Year O		190 74	10,001	13		See Startup Budget Surplus
Private & Foundation Granta				15	434,000	
					3,885,101	
				-		
100 - Salaries:						FTEs Notes
		Hei	admaster (12 months	15	105,000	] 1
			r School (12 months		75,000	] 1
			admaster (12 months		32,500	0.5 Also teaches
and the state of the	Din	a state of the local division of the local d	perations (12 months	6 J	75,000	
			Manager (12 months		30,000	
			Assistant (12 months Director (12 months	-	30,000	
			ordinalor (12 months		25,000	
the second se			Counselor (0 months	-		Position not filled until after Year 1
			Students (0 months		•	Position not filled until after Year 1
	C	EO/Super	intendent (12 months	5	145,000	] 1
						]
eachers & other Professional Personnel					- X -	
Regular Education Teach					525,000	12.5
			everage) (12 months		637,500	17
			average) (12 months		200.000	
	2 Feachers (Spec	abl Ed.) (A	\$45,000 (12 months	3	90,000	2 1129 1.18 62
upport Personnel	Declater	d News C	\$35,000 /47	ve	35,000	- ADIA N CHINA
112 - Substitutes-\$80/day, 5 days/teacher (13)	regeteres	a taniga @	\$35,000 (12 months	5	5,200	1-112 / 1119
Total Salar	ins	_			2,070,200	49 Total FTEs
10000 30000	ted.	_		-		$\frac{1}{2}$ $\frac{1}{\sqrt{1-1}} \int_{(1)^{2}} \int_{(1$
				1-		21 21
141 - Medicare - 1.45% of total salaries		-		18	30,016	7
3141 - Social Security - 6.2% of total salaries				1	128,352	
142 - Insurance Benefits - \$500/mo *12mos. per F-T em	cloyee x 48			5	294,000	
143 - Worker's Compensation Insurance - 0.00% of total	salaries			5	18,032	1 Č
3145 - Unemployment Compensation Insurance - 2.00% of	of total salartes			5	41,404	V
3148 - TRS - Reporting Entity 0.55% of total sataries				5	11,386	M
3146 - TRS - New Member match 6.446% for 25% of lots	the second se	the second se		\$	23,407	\$) 34,793 6145 Total
8149 - Employee Benefits - Employer 403(b) match at 2%	of total non-leac			\$	11,550	
		Tota				
and the second		100	Payroll Cost (6100	0 110/280	20200240	88% of Total Revenue
Professional & Contracted Services (8200):	T				-	58% of Total Revenue
1211 - Legal Services	1	Estimated	evices bas tenlater	\$	12,000	/
1211 - Legal Services 1212 - Audit Services		Estimated First y	relainer and reserve your oudit & 990	5	12,000	, Est.mala per engagement letter (Atlach P)
Professional & Contracted Services (6200): 3211 - Legal Services 3212 - Audt Services 3219 - Professional Sve.		Estimated First y	evices bas tenlater	5	12,000	/
3211 - Legal Services 3212 - Audit Services		Estimated First y MO Service	retainer and reserve year cudit & 990 se (10% of State Aid	\$ 5 1) \$	12,000 15,000 318,679	Est male per engagement letter (Atlach P) 10% of State Ald For Painting and minor bidg maintanance, since renied actropi (schwid litike) read to be updated with minor
1211 - Legal Services 1212 - Audt Services 1219 - Professional Svs. 1249 - Contracted Maintenance & Repair	c	Estimated First y MO Service	retelner and reserve your audit & 990 se (10% of State Aid Tenant Improvement	5 5 1) 5 8 5	12,000 15,000 318,679 100,000 <sup>5</sup>	Juint male per engagement letter (Atlach P) 10% of State Ald For Painting and mitror bidg maintanance, since rented
1211 - Legal Services 1212 - Audt Services 1219 - Professional Svs. 1249 - Contracted Maintenance & Repair	c	Estimated First y MO Service	retainer and reserve year cudit & 990 se (10% of State Aid	5 5 1) 5 8 5	12,000 15,000 318,679	Est male per engagement letter (Atlach P) 10% of State Ald For Painting and minor bidg maintanance, since renied actropi (schwid litike) read to be updated with minor
1211 - Legal Services 1212 - Audt Services 1219 - Professional Sve. 1249 - Contracted Maintenance & Repair	\$125/m	Estimated First y MO Servic	relainer and reserve veer audit & 990 ee (10% of State Aid Tenant Improvement 1	\$ 5 1) \$ 8 \$ 2 \$	12,000 15,000 318,679 100,000 <sup>4</sup> 1,500	Est male per engagement letter (Atlach P) 10% of State Ald For Painting and mitror bidg maintanance, since renied actuol facility will likely need to be updated with micro- improvements.
3211 - Legal Services 3212 - Audit Services 3219 - Professional Svs. 3249 - Contracted Maintenance & Repair 3259 - Utilities	\$125/m \$2,000/mo.	Estimated First y MO Servic no. Phone Electricity	retainer and reserve voor oudit & 990 as (10% of State Aid Tonant Improvement 1: 1:	\$ 5 1) \$ 8 \$ 2 \$ 2 \$	12,000 15,000 316,679 100,000 <sup>4</sup> 1,500 24,000	Est male per engagement letter (Atlach P) 10% of State Ald For Painting and mitror bidg maintanance, since renied actuol facility will likely need to be updated with micro- improvements.
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1211 - Legal Services 1212 - Aurit Services 1219 - Professional Sve. 1249 - Contracted Maintenance & Repair 1259 - Utilities 1259 - Utilities 1259 - Rentais 1259 - Ren	\$125/m \$2,000/mo. \$500/mo. C \$40,000/mo. \$500/mo. C \$1,000/mo. temp of \$1,000/mo. temp of \$1,000/mo. \$10 es \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$2,000/mo. \$3,000/mo. \$3,000/mo. \$40,000/	Estimated First 1 MO Servic Inc. Phone Electricity Copier 3, 2 S. Rent - dify . Rent - dify . Rent - dify . Rent - dify . Rent - Sch. 2,000/mo, I & Contra dent teats Contra dent dent dent dent dent dent dent dent	retainer and reserve your audit & 990 as (10% of State Aid Tonant Improvement 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	S         S           S         S	12,000 15,000 318,579 100,000 1,500 24,000 12,000 480,000 	Strate per engagement letter (Atlach P) 10% of State Ald For Painting and mitror tikly meintanuance, since renied actnool factiny will likely need to be updated with mitror improvements.  S 25,600 0259 Total  Rent estimated to be approximately \$40,000 per month or \$12,31/ft on a 39,000 ft bidg (701/student) based on exactionce with previous negotiated school leases. This also equates to about 15% of state aid which is a masonable approximation.  S 492,000 6269 Total  Most lexits purchased in Yr 0  S 78,6555 B399 Total  Estimate for transportation of students (Special Ed) based on history of operating schools in Artzone
3211 - Legal Services 3212 - Autit Services 3219 - Professional Sve. 3249 - Contracted Maintenance & Repair 3259 - Uddites 3200 - Rentala 3200 - Rentala 5299 - Misc. Svahousekeep & supplios Te	\$125/m \$2,000/mo. \$500/mo. C \$500/mo. C \$500	Estimated First 1 MO Servic Inc. Phone Electricity Copier 3, 2 S. Rent - dify . Rent - dify . Rent - dify . Rent - dify . Rent - Sch. 2,000/mo, I & Contra dent teats Contra dent dent dent dent dent dent dent dent	retainer and reserve voor oudit & 990 as (10% of State Aid Tonant Improvement 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	S         S           S         S	12,000 15,000 318,579 100,000 1,500 24,000 12,000 480,000 	Estimate per angagement letter (Attach P) 10% of State Ald For Painting and mitror tidg maintanance, since renied actionol factiny will likely need to be updated with mitror improvements. \$ 25,600 0259 Totel Rent estimated to be approximately \$40,000 per month or \$12.01/R on a 39,000 ft bidg (70/student) based on excertance with previous negotiated school faces. This also equates to about 15% of state aid which is a masonable approximation. \$ 492,000 6209 Total Most lexits purchased in Yr 0 \$ 78,555 8399 Total Estimate for transportation of students (Special Ed) based on history of operating schools in Artzone

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Total Estimated Expenses >>>> \$ 3,796,223 Excludes Extra-curriculars which net \$0

Total Estimated Surplus >>>> \$ 88,878

		APPROVED DURING CONTINGENCY PROCESS
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1	NEW TEXAS CHARTER SCHOOL	
2	000000 Utr	
	2011-2012 Estimate of State Ald Entitlement Template	
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5	ji i	TOTAL - All Grades
6	Total Number of Students Enrolled (Average Membership)	557
9		
7	Total Number of High School Students Enrolled	50
8	Total Number of Military Students Enrolled	9 is a stand of a thendance
9	Percentage Rate of Attendance	90% See attached history or a domies in Arizon
10		90% See attached history of attendance 90% See attached history of attendance rates at Greet Hearts academics in Arizon Heat show average at 96%.
12	SpecialEducation Data A State Number Enrolled in Homebound (Code 01)	that show and
13	Number Enrolled in Hospital Class (Code 01)	
14	Number Enrolled in Speech Therapy (Code 00)	0
15	Number Enrolled in Resource Room (Code 41 & 42)	0
16	Number Enrolled In Self-Contained Mild/Mod/Sev (Code 43 & 44)	0 Left blank for conservation
17	Number Enrolled in Full-Time Early Childhood (Code 45)	0 > Left blank for conservation
18 19	Number Enrolled in Off-Home Campus (Code 91-98) Number Enrolled in VAC (Code 08)	
20	Number Enrolled from State Schools (Code 30)	0
21	Number Enrolled in Residential Care & Treatment (Code 81-89)	0
22	Number Enrolled in Mainstream (Code 40)	0
	Caroly Anternology Data	
24 25	Number Enrolled in One-hour Class (Code V1) Number Enrolled in Two-hour Class (Code V2)	0
26	Number Enrolled in Three-hour Class (Code V3)	0
27	Number Enrolled in Four-hour Class (Code V4)	0
28	Number Enrolled in Five-hour Class (Code V5)	0
29 30	Number Enrolled in Six-hour Class (Code V6) Number Enrolled in Advanced Career and Tech	
-	Gifted & Talented Enrollment	0
	Number of Pregnancy Related Students	
33	Number Enrolled In Bilingual/ESL	0 & Left blank for conservation
34	hade shall be be been a standard and the standard	the state of the state of the
36	Compensatory Education Enrollment	and the second
	HS ADA from Last PEIMS submission	
	Did this Charter Holder Participate in TRS Active Care in 2005-08?	
20	the second s	a star
10	Full-time staff (do not include administrators, teachers, librarians, nurses or counselors)	
	Part-time staff (do not include administrators, teachers, librarians, nurses	
10	or counselors)	rel
	Regular Program Transportation Allotment	
	Special Education Program Transportation Allotment Career and Technology Program Transportation Allotment	
14	Transportation Total	
15	Transportation Total	Chick and the set of the second
		1
16 17 18 19		
18		10
19		
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Data Entry - page 1 of 2 Printed on 3/13/2013

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NEW TEXAS CHARTER SCHOOL 000000 2017 Estimate of State Ald Entitionent Templat		
Template Date 07/25/2012-PRELIMINARY	<b>a</b>	iithu - 1
lefined ADA	D. Stephenet	501.300
IS ADA	1 1	ALSE
IliRary ADA		0.000
Subschutz dates	24月	1.1
Homebound (Code 91)	Contraction of the	0.000
Hospital Class (Code 02)	1	0.000
Speech Therapy (Code 60)	1	0.000
Resource Room (Code 41& 42)		0.000
Self-contained Mild/Mod/Severs (Ceda 43 & 44)		0.000
Full Time Early Childhood (Code 45)	-	0.000
Off-home Campus (Codes 91-98)	-	0.000
VAC (Code 98) State School Students (Code 34)		0.000
Residential Care & Treatment (Code 81-89)	1	0.000
CENTRE LINE CONTRACTOR	Figure 1	100.000
Laborer Care a second of the		20.760
Career & Technology FTEs	10	0.000
dvanced Career & Technology FTES	1	0.000
	5 - C	合物加制
Aainstream ADA	1 1	0.000
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The state of the s	1	0.000
uljusted GYA	1 10 m	0.973
CUMPARING STATES TO A STATE OF A	<b>MRA</b>	(man hi
Id Charter Holder Perificipale in TRB Antive Care in 2005-087	11.	NO
Full-Time Staff (Does not include Administrators)	1	0.000
Part-Time Staff (Does not include Administrators)	-	0.000
State Average Basic Alfotment State Average Adjusted Basic Alfotment	5	4,825
State Average Adjusted Allotment	1	5,909
State Average DTR- Level II	15	0.04972
State Average DTR- Level III	18	0.03954
Mana Construction And And And And And And And And And An	-	1
Regular Program Block Grant	15	2,748,085
Special Education Block Grant (Reveal 52% of Amount as proposed)	15	
Mainstream Special Education(speed 52% of Amount as processed)	15	
Career & Technology Grant (Ippend 38% of Around as proposed) 31Red & Talented Op Grant (ppend 52% of Arount as proposed)	5	
Regular Compensatory Ed down szty of Amount on proposed	15	
Helitary Allotment	15	
Pregnancy Related Services Allocation panel 52% of Amount 46 proposed	15	
Billingual Education Block Grant places \$2% of Ameent as proposed	15	
and the dilles and a second		1
Regular Program	1\$	•
Special Education	15	
Career and Technology	15	
HS Allotment	15	3 740 605
State Share of Tter I	15	2,746,065 245,257
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Stalf Salary Altotment	1	
Additional State Aid for Tax Reduction (ASATR)	1	195,464
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State Aid calculator available at time of charter submission in 2012.



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APPROVED DURING CONTINGENCY PROCESS

Arizona Schools	Budgeted Enroliment	YTD ADM ("Average Dally Membership")	Percentage that ADM is of BE	YTD ADA ("Average Dally Attendance")	Percentage that ADA is of Budget	Percentage tha ADA is of ADN
Veritas Prep	620	616	99.3%	588.91	95.0%	95.7%
Chandler Prep	668	667	99.8%	636.49	95.3%	95.5%
Mesa Prep	372	406	109.2%	389.75	104.8%	95.9%
Teleos Prep	280	250	89.3%	239.32	85.5%	95.7%
Glendale Prep	340	341	100.3%	326.51	96.0%	95.8%
Scottsdale Prep	802	790	98.5%	753.31	93.9%	95.3%
Anthem Prep	484	500	103.3%	476.01	98.3%	95.2%
Trivium Prep	154	158	102.3%	150.88	98.0%	95.7%
Archway Chandler	498	504	101.2%	484.79	97.3%	96.2%
Archway Veritas	504	508	100.8%	486.98	96.6%	95.8%
Archway Scottsdale	393	391	99.5%	378.65	96.3%	96.8%
Archway Trivium	420	426	101.4%	408.23	97.2%	95.9%
North Phoenix Prep	100	102	102.3%	99.07	99.1%	96.9%
Archway North Phoenix	450	441	97.9%	424.27	94.3%	96.3%
Maryvale	140	140	99.9%	132.24	94.5%	94.6%
TOTAL	6225	6239	100.2%	5975.41	96.0%	95.8%

In Arizona, Charter schools receive payments from the state based upon ADM ("Average Daily Membership", which is the total of fractional students and full-time students, minus withdrawals, who are enrolled throughout the year. The ADM numbers may be verified from CHAR55 published reports by the Arizona Department of Education.

# ATTACHMENT P GREAT HEARTS AMERICA – TEXAS

NEGOTIATED SERVICE AGREEMENT(S)



# ATTACHMENT P - GREAT HEARTS ACADEMIES - SAN ANTONIO

February 19, 2012

Ward Huseth Great Hearts America Texas c/o Great Hearts Academies, Inc. 3102 N. 56<sup>th</sup> Street Suite 300 Phoenix, AZ 85018

To Whom It May Concern:

To date, Great Hearts Academies has not entered into any agreements or understandings with financial or accounting service vendors.

Most of the financial accounting, payroll, and tax accounting services for Great Hearts America—Texas will initially be provided through Great Hearts Academies, Inc., a non-profit charter management organization serving twelve schools in Arizona. No terms haves been negotiated to date between Great Hearts America – Texas and Great Hearts Academies, Inc. However if a negotiated service agreement is entered into, we would expect that the terms will be relatively consistent with past practices of Great Hearts Academies, Inc. whereby the charter school will pay for professional services associated with back office administrative services (e.g. accounting, payroll, etc.) as a percentage of the schools state aid received.

Additionally, Great Hearts Academies, Inc. has historically engaged Fester & Chapman, P.C. (Phoenix, AZ) to perform independent audits and assist in the preparation of IRS Form 990 filings. We would anticipate engaging Fester & Chapman for Great Hearts Academies—Texas or a similarly qualified tax and accounting firm through a competitive bid process.

Sincerely,

Ward Huseth Chief Financial Officer Great Hearts America - Texas



Attachment P



APPROVED DURING CONTINGENCY PROCESS

February 27, 2013

Dr. Peter Bezanson, President of the Board Great Hearts America - Texas 3102 North 56th Street, Sulte 300 Phoenix, AZ 85018

Dear Dr. Bezanson:

#### The Objective and Scope of the Audit of the Financial Statements

You have requested that Padgett, Stratemann & Co., L.L.P. ("PS&Co.") audit the first year financial statements of Great Hearts America - Texas (the "Company"), which comprise the statement of financial position as of the period ending December 31, 2012, and the related statements of activities and cash flows for the period then ended, and the related notes to the financial statements.

We are pleased to confirm our understanding of this audit engagement by means of this letter. Our acceptance of this engagement is subject to our satisfactorily completing our normal engagement acceptance due diligence procedures required for new clients. We will notify you promptly if we become aware of any matters noted during our acceptance procedures that results in our not being able to continue with final acceptance of this engagement.

Our audit will be conducted with the objective of our expressing an opinion on the financial statements.

#### The Responsibilities of the Auditor

We will conduct our audit in accordance with auditing standards generally accepted in the United States of America ("GAAS"). Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

Because of the inherent limitations of an audit, together with the inherent limitations of Internal control, an unavoidable risk that some material misstatements may not be detected exists, even

SAN ANTONIO 100 N.E. LOOP 410, SUITE 1100 SAN ANTONIO, TEXAS 78216 210 828 6281

AUSTIN 811 BARTON SPRINGS ROAD, SUITE 550 AUSTIN, TEXAS 78704 512 476 0717 250 of 267

TOLL FREE: 800 879 4966 WEBI PADGETT-CPA.COM

February 27, 2013 - page 2

APPROVED DURING CONTINGENCY PROCESS

though the audit is properly planned and performed in accordance with GAAS. Also, an auum ... .ot designed to detect fraud or errors that are immaterial to the financial statements.

in making our risk assessments, we will consider internal controls relevant to the Company's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Company's Internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.

We will also communicate to the Board of Directors (a) any fraud involving senior management and fraud (whether caused by senior management or other employees) that causes a material misstatement of the financial statements that becomes known to us during the audit, (b) any instances of noncompliance with laws and regulations that we become aware of during the audit (unless they are clearly inconsequential), (c) disagreements with management and other serious difficulties encountered in performing the audit, and (d) various matters related to the Company's accounting policies and financial statements.

We will maintain our independence in accordance with the standards of the American Institute of Certified Public Accountants ("AICPA"). Under certain circumstances, including but not limited to a public offering of securities, we are also required to be independent under the rules of the Securities Exchange Commission ("SEC") and the Public Company Accounting Oversight Board ("PCAOB"). The rules of the SEC and PCAOB are different from those of the AICPA. Examples of services allowed under the AICPA rules that would impair independence under the SEC and PCAOB rules include preparation of the financial statements, preparation of the tax provision, implementing financial information systems, internal audit outsourcing, and performance of tax services for a contingent fee. If our independence was determined to be impaired under the SEC and PCAOB rules for any periods where independence with such rules would be required, the Company would be required to have the Impacted periods re-audited, at the Company's expense, by another firm. Accordingly, you agree to notify us promptly if you determine you may require us to be independent under the rules of the SEC and PCAOB.

APPROVED DURING CONTINGENCY PROCESS

Dr. Peter Bezanson, President of the Board Great Hearts America – Texas Phoenix, AZ 85018

February 27, 2013 - page 3

The Responsibilities of Management and Identification of the Applicable Financial Reporting Framework

Dur audit will be conducted on the basis that management and when appropriate, those charged with governance, acknowledges and understands it has a responsibility (for a purposes of this letter, management of the Company is defined as yourself and Mr. Ward Huseth):

- For the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America.
- For the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of the financial statements that are free from material misstatement, whether due to fraud or error.
- To provide us with:
  - Access to all information of which management is aware that is relevant to the preparation and fair presentation of the financial statements such as records, documentation, and other matters.
  - Additional information that we may request from management for the purpose of the audit.
  - Unrestricted access to persons within the entity from whom we determine it necessary to
    obtain audit evidence.

As part of our audit process, we will request from management and when appropriate, those charged with governance, written confirmation concerning representations made to us in connection with the audit, including among other items:

- That management has fulfilled its responsibilities as set out in the terms of this letter.
- That management believes the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

Management is responsible for identifying and ensuring that the Company complies with laws and regulations applicable to its activities and for informing us about all known material violations of such laws or regulations. In addition, management is responsible for the design and implementation of programs and controls to prevent and detect fraud and for informing us about all known or suspected fraud affecting the entity involving management, employees who have significant roles in

February 27, 2013 - page 4

Internal control, and others where fraud could have a material effect on the financial statements. Management is also responsible for informing us of its knowledge of any allegations of fraud or suspected fraud affecting the Company received in communications from employees, former employees, analysts, regulators, short sellers, or others.

APPROVED DURING CONTINGENCY PROCESS

The Board of Directors is responsible for informing us of its views about the risks of fraud within the entity and its knowledge of any fraud or suspected fraud affecting the entity. For purposes of this letter as well as the audit engagement, in addition to you as president of the Board, the members of the governing body also include the following:

- Dr. Dan Scoggin, Vice President
- Mr. Ward Huseth, Board Member

The Company agrees it will not include our reports, or otherwise make reference to us, in any public or private securities offering without first obtaining our permission. Any such request is also a matter for which separate arrangements will be necessary. After obtaining our permission, the Company also agrees to provide us with printer's proofs or masters of such offering documents for our review and approval before printing and with a copy of the final reproduced material for our approval before it is distributed. In the event our auditor/client relationship has been terminated when the Company seaks our permission, we will be under no obligation to grant such permission or approval.

#### Company's Records and Assistance

If circumstances arise relating to the condition of the Company's records, the availability of appropriate audit evidence, or indications of a significant risk of material misstatement of the financial statements because of error, fraudulent financial reporting, or misappropriation of essets which, in our professional judgment, prevent us from completing the audit or forming an opinion, we retain the unilateral right to take any course of action permitted by professional standards, including declining to express an opinion, issuing a report, or withdrawing from the engagement. Time and effort through this stage of the audit will be billed and due accordingly.

During the course of our engagement, we may accumulate records containing data that should be reflected in the Company's books and records. The Company will determine that all such data, if necessary, will be so reflected. Accordingly, the Company will not expect us to maintain copies of such records in our possession.

APPROVED DURING CONTINGENCY PROCESS

February 27, 2013 - page 5

The assistance to be supplied by Company personnel, including the preparation of schedules and analyses of accounts, will be discussed and coordinated with Mr. Ward Huseth. The timely and accurate completion of this work is an essential condition to our completion of the audit and issuance of our audit report.

If, in connection with our audit, you request us to perform accounting services necessary for the preparation of the financial statements (such as maintaining depreciation schedules, computing the provision for income taxes, drafting the financial statements, etc.), you agree to designate Mr. Ward Huseth as the appropriate individual to oversee the services, make all management decisions involved in those services, evaluate the adequacy and results of the services, and accept responsibility for the results of the services.

#### Other Relevant Information

Unless instructed otherwise by the Company, we sometimes utilize third-party service providers to assist with data input or to provide assistance to us in meeting our service obligation to the Company. We remain solely responsible for the quality and accuracy of the services we are engaged to perform, regardless of any work assumed by third parties. We also hold the third parties to the same confidentiality standards and obligations to which we are subject regarding the Company's account and information.

#### Indemnification and Limitation of Liability

Because of the importance of oral and written management representations to an effective audit, the Company releases and indemnifies PS&Co. and its personnel from any and all claims, liabilities, costs, and expenses attributable to any knowing misrepresentation, willful misconduct, and/or fraudulent behavior by management. This indemnification will survive termination of this letter.

in the event PS&Co. Is found to be negligent in provision of any services covered by this agreement, which result in damage to the Company, PS&Co.'s liability to the Company will be limited to actual damages or losses incurred by the Company. PS&Co. will not be liable to the Company for any punitive damages.

The agreements and undertakings of the Company contained in this arrangement letter, such as those pertaining to restrictions on report use and distribution, limitation on liability, and indemnification, will survive the completion or termination of this engagement.

APPROVED DURING CONTINGENCY PROCESS

February 27, 2013 - page 6

#### Fees

Our fees are based on the time required by the individuals assigned to the engagement, plus direct expenses. Individual hourly rates vary according to the degree of responsibility involved and the skill required. Our fee for providing the above services should approximate \$9,000 to \$12,000 assuming the above schedules and other items are received by us on a timely basis. Interim billings will be submitted at periodic dates to cover charges and expenses incurred. Bills for services are due when provided, payable in San Antonio, Texas. If we discover any material changes in time requirements or nature and scope of services, we will discuss the situation with you before we proceed and issue a change order.

We reserve the right to suspend providing services if invoices remain unpaid for more than 45 days. Payment terms should be specifically stated.

Our professional standards require us to perform certain additional procedures, on current and previous years' engagements, whenever a partner or professional employee leaves the firm and is subsequently employed by or associated with a client. Accordingly, the Company agrees it will compensate PS&Co. for any additional costs incurred as a result of the Company's employment of a partner or professional employee of PS&Co.

in the event we are requested or authorized by the Company or are required by government regulation, subpoena, or other legal process to produce our documents or our personnel as witnesses with respect to our engagements for the Company, the Company will, so long as we are not a party to the proceeding in which the information is sought, reimburse us for our professional time and expenses, as well as the fees and expenses of our counsel, incurred in responding to such requests.

This engagement includes only the audit services specifically described in this letter. Consulting services will be billed separately. Appearances before judicial proceedings, governmental organizations, or regulatory bodies arising out of this engagement will be billed to you separately.

#### **Tax Services**

Our services under this arrangement letter do not include services for tax return preparation, tax advice, or representation in any tax matter. Nevertheless, we may discuss with you certain tax considerations or provide you with tax information that may be relevant to our services. Any such discussions or information would be based upon limited tax research, limited due diligence, and limited analysis regarding the underlying facts. Because additional research, or a more complete

APPROVED DURING CONTINGENCY PROCESS

February 27, 2013 - page 7

review of the facts, could affect our analysis and conclusions, the information provided during these discussions should not be used as the basis for proceeding with any transaction or any tax return reporting.

#### **Consulting Services**

At the request of the Company, PS&Co., as the Company's Independent auditors, may provide assistance during the year with consulting services or projects. Consulting services include, but are not fimited to:

- Assistance and consultation on interpretation of accounting standards applicable to the Company
- Assistance and consultation regarding accounting, operational, and/or financial matters
- Tax planning and transaction structuring

To maintain our independence required for the Company's attest services, it is important we define both our roles as to consulting services.

Our role as a consultant is to provide assistance and professional expertise in defining the questions, identifying options, and analyzing the effects of specific courses of action and decisions. Our role cannot include any functions or actions that would put us in a management role for the Company. Your role as management is to make the final decision as to all transactions and other actions for which we have provided the Company with consulting assistance.

Our professional standards require the Company to designate a qualified person(s) in the Company to make these final management decisions for general consulting services/projects. You designate Mr. Ward Huseth as this person.

#### Other Matters

in the unlikely event differences concerning our services or fees should arise that are not resolved by mutual agreement, to facilitate judicial resolution and save time and expense of both parties, the Company agrees to participate in mediation, under the Commercial Mediation Rules of the American Arbitration Association, before any claim is asserted.

February 27, 2013 - page 8

This letter shall serve as the Company's authorization for the use of e-mail and other electronic methods to transmit and receive information, including confidential information, between PS&Co. and the Company and between PS&Co. and outside specialists or other entities engaged by either PS&Co. or the Company. The Company acknowledges that e-mail travels over the public internet, which is not a secure means of communication and, thus, confidentiality of the transmitted information could be compromised through no fault of PS&Co. PS&Co. will employ commercially reasonable efforts and take appropriate precautions to protect the privacy and confidentiality of transmitted information.

APPROVED DURING CONTINGENCY PROCESS

#### Reporting

We will issue a written report upon completion of our audit of the Company's financial statements. Our report will be addressed to the Board of Directors of the Company. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph(s), or withdraw from the engagement.

This letter constitutes the complete and exclusive statement of agreement between Padgett, Stratemann & Co., L.L.P. and Great Hearts America – Texas, superseding ALL PROPOSALS ORAL OR WRITTEN AND all other communications, with respect to the terms of the engagement between the parties.

If the Company is in agreement with the terms of this letter, please sign one copy and return it for our files.

We look forward to establishing a long-term and excellent relationship with Great Hears America – Texas,

Sincerely,

Joel Perez, Jr. Partner

APPROVED DURING CONTINGENCY PROCESS

Dr. Peter Bezanson, President of the Board Great Hearts America - Texas Phoenix, AZ 85018

February 27, 2013 - page 9

Enclosure

The foregoing letter fully describes the Company's understanding and is accepted.

**GREAT HEARTS AMERICA - TEXAS** 

Dr. Peter Bezanson, President of the Board of Directors

2/27/13 Date

# APPROVED DURING CONTINGENCY PROCESS

# **Charter Schools**

Charter Schools are a vital part of the community. Therefore, it is important their operations run smoothly and efficiently. More and more, Charter Schools are facing additional requirements for transparency from the IRS, accountability to TEA and federal government, modification of financial statement reporting and funding changes.

Today's Charter Schools have to meet extensive filing requirements that are more complex than ever before. There is a need to determine and align compliance and accounting practices with governance, policy/procedure, disclosure questions, and TEA's changes in PEIMS reporting detail.

Our clients have found our experienced staff has the ability to recognize and deliver tailored services to meet these increasing needs of Charter Schools of all sizes.

Our Not-for-Profit/School Qualifications and Expertise

- Team of over 50 professionals, led by four partners and eight managers, focused on providing services to the public sector and specifically education organizations
- Diverse client base and relevant experience, including:
  - o Public charities
  - o Faith-based organizations
  - o Charter Public School Districts
  - o Independent School Districts
  - Private schools
  - Universities and colleges
  - Social service organizations
- Key understanding of Charter School's unique accounting, tax, and regulatory reporting requirements
- Experienced knowledge of TEA's audit and appeals procedures

#### **Our Specific Services**

- Set-up of tax-exempt organizations
- Annual audit services
- Unrelated business income tax consulting
- Sales tax compliance
- Responding to TEA audit reports
- Assistance in appealing TEA audit reports
- Functional expense allocation studies under TEA policies
- Tax review services
- Compliance audit services of internal controls and accounting procedure
- Human resource services
- Strategic planning
- Value-Added seminars for the tax exempt and education community

#### CURRENT & PAST CLIENTS

#### **Charter Schools**

- Brooks Academy of Science & Engineering Academica Management SW, LLC
- Casa Gracia dba Trinity Charter School
- East Austin Academica, inc.
- KIPP: San Antonio
- John H. Wood, Jr. Charter District
- New Frontiers Charter School
- San Antonio Preparatory Academy
- School of Excellence in Education

#### **Our Team**

Santos Fraga Audit Portner santos.fraga@padgett-cpa.com

Joel Perez, Jr. Audit Partner Joel.perez@padgett-cpa.com

Mike O'Brien Audit Portner mike.obrien@padgett-cpa.com

Josle Behrend Tax Partner josie.behrend@padgett-cpa.com

Gary Christensen Tax Manager gary.christensen@padgett-cpa.com

San Antonio 100 N.E. Loop 410, Suite 1100 San Antonio, Texas 78216

Austin 811 Barton Springs, Sulte 550 Austin, Texas 78704

Toll Free 800.879.4966



# ATTACHMENT Q GREAT HEARTS AMERICA – TEXAS

CERTIFICATE OF OCCUPANCY OR EQUIVALENT CERTIFICATE



# ATTACHMENT Q - TEA

February 17, 2012

Peter Bezanson Great Hearts America Texas c/o Great Hearts Academies, Inc. 3102 N. 56<sup>th</sup> Street Suite 300 Phoenix, AZ 85018

To Whom it May Concern:

As of the filing of this application, Great Hearts Academy – San Antonio, applicant, does not yet have a Certificate of Occupancy for a specific site(s).

Great Hearts Academy Texas plans to situate Great Hearts Academy – San Antonio in the Alamo Heights/Monte Vista, or Central San Antonio area. Currently suitable location(s) are being explored.

Great Hearts Academy – San Antonio understands that it *must* submit a valid Certificate of Occupancy before serving students, and it will comply with this TEA requirement once one is obtained.

Sincerely,

Peter Bezanson President, Board of Directors Great Hearts America Texas



ATTACHMENT R GREAT HEARTS AMERICA – TEXAS

LEASE AGREEMENT(S), ETC.



# ATTACHMENT R - TEA

February 17, 2012

Peter Bezanson Great Hearts America Texas c/o Great Hearts Academies, Inc. 3102 N. 56<sup>th</sup> Street Suite 300 Phoenix, AZ 85018

To Whom It May Concern:

As of the filing of this application, and as stated in Attachment Q, Great Hearts Academy – San Antonio, applicant, does not yet have a Certificate of Occupancy for a specific site(s). As such, no negotiated lease agreement, deed(s) to property, earnest money contract, or purchase agreement(s), exist at this time.

Great Hearts Academy Texas plans to situate Great Hearts Academy – San Antonio in the Alamo Heights/Monte Vista, or Central San Antonio, area. When the appropriate agreement(s), deed(s), or contract(s) are secured for suitable building(s), the TEA will be notified.

Sincerely,

Peter Bezanson

President, Board of Directors Great Hearts America Texas



ASSURANCES COVER SHEET GREAT HEARTS AMERICA – TEXAS

THIS SECTION CONTAINS ALL REQUIRED ASSURANCES:

- 1. SPECIAL EDUCATION ASSURANCES AND DEV. OF POLICIES AND PROCEDURES
- 2. BILINGUAL EDUCATION/ESL, SECTION 504, AND DYSLEXIA ASSURANCES
- 3. GENERAL APPLICATION OF ASSURANCES FOR FEDERAL PROGRAMS
- 4. SPECIAL ASSURANCES DOCUMENT
- 5. STATE BOE DISCLOSURES OF CAMPAIGN CONTRIBUTIONS FORM



Proposed Charter School Name: Great Hearts Academies - San Antonio

# Seventeenth Generation Charter Application Special Education Assurances and Development of Policies and Procedures

Pursuant to the Individuals with Disabilities Education Improvement Act (IDEA 2004) Section 613 (a) (1), each charter school must have on file with the Texas Education Agency (TEA) a plan that provides assurances that it has in effect policies, procedures and programs consistent with State policies and procedures governing special education. Charter schools are required to develop plans using the online Legal Framework for the Child-Centered Process following the guidance below. Posting plans on the Legal Framework is not required, but is strongly encouraged.

### **Electronic Submission**

Region 18 Education Service Center (ESC) in coordination with other ESCs provides leadership to the State in the electronic development of charter policies and procedures through the online Legal Framework for the Child-Centered Process Phase IV: "Charting the Course" (Legal Framework-Phase IV) at <u>http://framework.esc18.net/</u>.

#### Applicant Assurance Statement

The sponsoring entity's CEO must sign the assurance statement below certifying that the proposed charter school will have in place upon opening the above-described special education policies and procedures. Once the contract is issued and a county district number is assigned, the charter holder will develop its policies and procedures through the online Legal Framework.

#### **Future Updates to Policies and Procedures**

Charters will use the Legal Framework for developing and submitting updated policies and procedures assurances in the future. Guidance from ESCs on updates to policies and procedures will be ongoing.

#### **Technical Assistance**

For questions concerning or information about the electronic submission of charter policies and procedures, please consult with your regional ESC special education contact at <u>http://www.tea.</u> state.tx.us/special.ed/escinfo/contact.html.

#### **Assurance Statement**

By signing below, the sponsoring entity assures that the proposed charter school will have in place prior to opening policies and procedures that ensure implementation of IDEA 2004 and <u>all</u> federal regulations, Texas laws, State Board of Education (SBOE) rules, and commissioner's rules concerning students with disabilities receiving special education services and further assures that any future amendments to the regulations, laws, and rules will be incorporated into policies and procedures and implemented by the charter school.

Peter Bezanson

208 GreatHearts

Printed Name of Sponsoring Entity Board Chair

Signature of Sponsoring Entity Board Chair (must sign in blue ink)

February 17, 2012

Date

SAS 536-12 RFA 701-11-108

Proposed Charter School Name: Great Hearts Academy - San Antonio

# Seventeenth Generation Charter Application Bilingual Education/ESL, Section 504, and Dyslexia Assurances

TEC, Chapter 29, Subchapter B, TEC §12.104(b)(2)(G), and 19 TAC §§89.1201-.1265 require charter schools to identify limited English proficient students based on state criteria and to provide an appropriate bilingual education or English as a second language program conducted by teachers certified for such courses.

A. The charter holder certifies that prior to serving students the charter will have policies and procedures in place ensuring that it complies with the legal and regulatory requirements concerning identifying and providing appropriate educational services to limited English proficient students.

Check one	:
XYes	
[]No	

Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. §794, prohibits discrimination on the basis of disability in any program receiving federal financial assistance. A recipient that operates a public education program or activity shall provide a free, appropriate public education to qualified individuals.

- B. The charter holder certifies that prior to serving students the charter will have policies and procedures in place ensuring that it complies with the legal and regulatory requirements concerning identifying and providing appropriate educational services to students protected by Section 504. Check one:
  - XYes No

TEC §38.003, TEC §12.104(b)(2)(K), 19 TAC §74.28 and Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. §794, require charter schools to identify students with dyslexia or related disorders and to provide appropriate educational services.

- C. The charter holder certifies that prior to serving students the charter will have policies and procedures in place ensuring that it complies with the legal and regulatory requirements concerning identifying and providing appropriate educational services to students with dyslexia or related disorders. Check one:
  - XYes No

I the undersigned hereby certify that the information contained in this document is, to the best of my knowledge, correct and that the governing body of the charter holder has authorized me to provide these assurances.

Peter Bezanson

Printed Name of Sponsoring Entity Board Chair

Signature of Sponsoring Entity Board Chair (must sign in blue ink)

February 17, 2012

Date



SAS 536-12 RFA 701-11-108

# Great Hearts America - Texas

Official Name of Charter Holder

## Great Hearts Academies - San Antonio

Charter School Name

# 43-1973126 FEI No./Taxpayer ID

County-District No.

### TEXAS EDUCATION AGENCY

#### **Division of Planning and Grant Reporting**

### General Application of Assurances for Federal Programs Administered by the U.S. Department of Education

Authority for Data Collection: 20 USC Section I232e and P. L. 107-110, No Child Left Behind Act of 2001, Title IX, Part C. Section 9306 (a).

- Planned Use of Data: The requirements established in United States Code Annotated, Title 20, Education, Chapter 31, Subchapter III, Section 1232e stipulate that "Each local education agency which participates in an applicable program under which federal funds are made available to such agency through a State agency shall submit, to such agency or board, a general application containing the assurances set forth in subsection (b) of this section". The requirements of P. L. 107-110, No Child Left Behind Act of 2001. Title IX, Part C, Section 9306 (a) stipulate that "any applicant, other than a State educational agency that submits a plan or application under this Act, whether separately or pursuant to section 9305, shall have on file with the State educational agency a single set of assurances, applicable to each program for which a plan or application is submitted." The application shall cover the participation by the local educational agency, public agency, nonprofit private agency, institution, organization or Indian tribe in all federal programs administered by the U.S. Department of Education.
- Instructions: This general application will be in effect for the duration of participation in federal programs until such lime as the requirements change. The superintendent or authorized official must sign the certification and return to the address below. Payment for federally funded applications and contracts cannot be made by this Agency until the general application is received. Payments to grantees for current grants may be delayed if the General Application of Assurances is not received in the time requested. For further information, contact the Division of Planning and Grant Reporting at (512)463-7004.

#### Certification:

I, the undersigned authorized official for the above-named local educational agency, public agency, nonprofit private agency, institution, organization or Indian tribe in accordance with 20 USC Section 1232e and P. L. 107-110, No Child Left Behind Act of 2001, Title IX, Part C, Section 9306 (a), hereby apply for participation in federally funded education programs.

I certify that the above-named local educational agency, public agency, nonprofit private agency, institution, organization or Indian tribe will adhere to the assurances stated on the reverse side of this form.

Typed Name of Authorized Official or Charter Holder	Date	Telephone	Authorized Original Signature (blue ink)
Great Hearts America - Texas	2-17-2012	602-396-7543	1.17
Typed Title of Authorized Official of Charter Holder			Vin
Peter Bezanson			4
Address of Charter Holder		12.1	
Address of Charter Holder		City	State Zip Code



#### ASSURANCES

The following assurances are provided in accordance with the United Slates Code Annotated, Title 20, Education, Chapter 31, Subchapter III, Section 1232e and P. L. 107-110, No Child Left Behind Act of 2001, Title IX, Part C, Section 9306 (a):

#### Assurance is hereby given that

- the local educational agency will administer each program covered by the application in accordance with all applicable statutes, regulations, program plans, and applications;
- (2) the control of funds provided to the local educational agency under each program, and title to property acquired with those funds, will be in a public agency and a public agency will administer those funds and property;
- (3) the local educational agency will use fiscal control and fund accounting procedures that will ensure proper disbursement of, and accounting for, Federal funds paid to that agency under each program;
- (4) the local educational agency will make reports to the Texas Education Agency or State Board of Education and to the Secretary of Education as may reasonably be necessary to enable the Texas Education Agency or State Board of Education and the Secretary of Education to perform their duties and the local educational agency will maintain such records, including the records required under section 1232f \* of this title, and provide access to those records, as the Texas Education Agency or State Board of Education or the Secretary of Education deem necessary to perform their duties;
- (5) the local educational agency will provide reasonable opportunities for the participation by teachers, parents, and other interested agencies, organizations, and individuals in the planning for and operation of each program;
- (6) any application, evaluation, periodic program plan or report relating to each program will be made readily available to parents and other members of the general public:
- (7) in the case of any project involving construction-
  - (A) the project is not inconsistent with overall State plans for the construction of school facilities, and
  - (B) in developing plans for construction, due consideration will be given to excellence of architecture and design and to compliance with standards prescribed by the Secretary of Education under section 794 of Title 29 in order to ensure that facilities constructed with the use of Federal funds are accessible to and usable by individuals with disabilities;
- (8) the local educational agency has adopted effective procedures for acquiring and disseminating to teachers and administrators participating in each program significant information from educational research, demonstrations, and similar projects, and for adopting, where appropriate, promising educational practices developed through such projects; and
- (9) none of the funds expended under any applicable program will be used to acquire equipment (including computer software) in any instance in which such acquisition results in a direct financial benefit to any organization representing the interests of the purchasing entity or its employees or any affiliate of such an organization.

#### AND

In addition to the above, the following assurances are provided in accordance with P. L. 107-110, No Child Left Behind Act of 2001, Title IX, Part C, Section 9306 (a):

(1) (A) the control of funds provided under each such program and title to property acquired with program funds will be in a public agency or in a nonprofit private agency, institution, organization, or Indian tribe, if the law authorizing the program provides for assistance to those entities; and

(B) the public agency, nonprofit private agency, institution, or organization, or Indian tribe will administer the funds and property to the extent required by the authorizing statutes;

(2) the applicant will adopt and use proper methods of administering each such program, including -

(A) the enforcement of any obligations imposed by law on agencies, institutions, organizations, and other recipients responsible for carrying out each program; and

(B) the correction of deficiencies in program operations that are identified through audits, monitoring, or evaluation;

- (3) the applicant will cooperate in carrying out any evaluation of each such program conducted by or for the State educational agency, the Secretary, or other Federal officials;
- (4) before the application was submitted, the applicant afforded a reasonable opportunity for public comment on the application and considered such comment.
- \* Section 1232f, United States Code, Title 20, Education

#### RECORDS

Each recipient of Federal funds under any applicable program through any grant, subgrant, cooperative agreement, loan, or other arrangement shall keep records which fully disclose the amount and disposition by the recipient of those funds, and the total cost of the activity for which the funds are used, the share of that cost provided from other sources, and such other records as will facilitate an effective financial or programmatic audit.



Proposed Charter School Name:

Great Hearts Academies - San Antonio

# Seventeenth Generation Charter Application Special Assurances Document

The chair of the proposed sponsoring entity shall initial each of the following on this page and the next to indicate an understanding of and a commitment to comply with each of following assurances:

# **Open Meetings Requirements:**

The charter holder assures that all meetings in which charter school business is discussed will be posted to provide public notice, held in an open public forum, and any action items voted upon in a public forum as required by the Open Meetings Act in Government Code, Chapter 551.

Furthermore, the charter holder assures that all of the following will be discussed in open meetings and only acted upon with approval of the charter holder board:

- · The annual budget and all amendments to the budget,
- · Any changes to job descriptions from those submitted in the application for charter, and
- · Any changes in compensation from compensation as submitted in the application for charter.

### **Public Information Requirements:**

The charter holder assures that information, that is considered public, requested by anyone will be provided in accordance with Government Code, Chapter 552.

### Criminal History Check Requirements:

The charter holder assures that criminal history checks will be completed in accordance with law and that no person will serve as a member of the governing body of a charter holder, as a member of the governing body of the charter school, or as an officer or employee of an charter school if the person has been convicted of a misdemeanor involving moral turpitude, a felony, an offense listed in TEC 37.007(a) or an offense listed in Article 62.01(5) Code of Criminal Procedure.

### Annual Training Requirements:

The charter holder assures that all annual training requirements for board members and school administrators will be completed in accordance with law and commissioner rules.

### Residential Facilities Monitoring (RFM) System:

The charter holder assures that it understands that, pursuant to 19 Texas Administrative Code (TAC) §97.1072, there is a specific system for monitoring school districts and charter schools that serve students with disabilities who reside in RFs. The charter holder further assures that it understands that it will be required to report data related to students with disabilities residing in RFs in TEA's data collection system known as RF Tracker and that it may be subject to RFM intervention activities and on-site visits based upon a review of the data it reports or on random or other means of selection.

## Special RF Training:

The charter holder assures that all personnel involved with serving students with disabilities residing in an RF and personnel involved with reporting data in *RF Tracker* will receive training on the RFM system.



Proposed Charter School Name:

Great Hearts Academies - San Antonio

# Admission and Enrollment

The charter holder assures that parents or prospective students will not be required to attend an interview or meeting of any kind prior to admitting and/or enrolling a student, or during the time in which the student is enrolled.

The charter holder assures that volunteer hours, or payment in lieu of volunteer hours, will not be required of the parent or guardian as a requirement for student admission or enrollment.

The charter holder assures that there will be no specified days designated for enrollment and/or admission. If space is available, a student will be enrolled and admitted on any day at any time of day and must be counted as and considered a charter student immediately. State law does not allow for a trial enrollment period at a public school.

The charter holder assures that no student auditions will be required prior to enrollment and admission at the charter school unless the charter is originally approved by the State Board of Education (SBOE) as a performing arts school with an audition component or the charter was amended by the commissioner of education to designate the school a performing arts school with an audition component.

The charter holder understands that a student may be ineligible for enrollment at a charter school based on a history of a criminal offense, a juvenile court adjudication, or discipline problems under Texas Education Code (TEC), Chapter 37, Subchapter A, only if the enrollment prohibition was specifically approved by the SBOE when the charter was originally awarded, or if the charter was amended by the commissioner of education to allow this enrollment prohibition. It must be noted that the enrollment prohibition is not allowed for any prior discipline problems, but only those specified in TEC, Chapter 37, Subchapter A.

# Withdrawal and Expulsion Issues

The charter holder understands that only the parent or guardian may withdraw a student from the charter school, and the only time charter administrators may withdraw a student and use administrative withdrawal as the leaver code is in the rare instances when:

 a student is withdrawn by the district because the district discovers, when verifying enrollment information, that the student was not a resident of the district at the time of enrollment;

- the district discovers that the student has falsified enrollment information;

- proof of identification is not provided; or
- immunization records are not provided.

The charter holder understands that a student who fails to comply with the charter school's student code of conduct may not be administratively withdrawn. If a student commits an expellable offense, as outlined in the student code of conduct, the charter holder further understands that charter administrators may expel the student only after due process has been afforded the student, and the charter holder board has determined that expulsion is the appropriate consequence.

The charter holder understands that it has an obligation to notify the school district in which the student resides within three business days of any action expelling or withdrawing a student from the charter school. See 19 TAC §100.1211 (c).

I the undersigned hereby certify that the governing body of the charter holder has authorized me to provide these assurances as noted by my initials on this and the previous page.

Peter Bezanson

Printed Name of Sponsoring Entity Board Chair

Signature of Sponsoring Entity Board Chair

February 17, 2012

Date

SAS 536-12 RFA 701-11-108

Proposed Charter School Name: Great Hearts America - San Antonio

# Seventeenth Generation Charter Application Initial Report of Benefits or Campaign Contributions Conferred on Members of or Candidates for the State Board of Education For the period May 12, 2000 to the present

Individual Making Report: Peter Bezanson

Employer or company represented: Great Hearts America

Position/Title: Chief Academic Officer

Services rendered to SBOE or contract, grant, or charter issued by SBOE:

None

Transaction 1.

Date:

Amount:

Name of person(s) receiving benefit or contribution:

Detailed description of expenditure:

# Seventeenth Generation Charter Application Initial Report of Benefits or Campaign Contributions Conferred on Members of or Candidates for the State Board of Education For the period May 12, 2000 to the present

### Transaction 2.

Date:

Amount:

Name of person(s) receiving benefit or contribution:

Detailed description of expenditure:

### Transaction 3.

Date:

Amount:

Name of person(s) receiving benefit or contribution:

Detailed description of expenditure:

Peter Bezanson	February 17, 2012	
Name of Organization President	Date	

Signature of Organization President



SAS 536-12 RFA 701-11-108

JUN 2 6 2013

# CONTRACT FOR OPEN-ENROLLMENT CHARTER SCHOOL

This contract is executed between the Texas State Board of Education (the "Board") and Great Hearts America Texas ("Charter Holder") to operate Great Hearts Academy - San Antonio, a Seventeenth Generation open-enrollment charter school.

# General

 <u>Definitions</u>. As used in this contract: "Charter" means the Seventeenth Generation openenrollment charter as provided by, Chapter 12 Subchapter D, Texas Education Code, and granted by this contract.

"Charter Holder" means the sponsoring entity identified in the charter application and the entity to which a charter is granted by this contract.

"Charter School" means the Seventeenth Generation open-enrollment charter school. Charter School is part of the public school system of Texas and is a "charter school" within the meaning of 20 U.S.C. § 8066.

"Agency" means the Texas Education Agency.

"Commissioner" means the Commissioner of Education.

- 2. <u>The Charter</u>. This contract grants to Charter Holder a Seventeenth Generation openenrollment charter under Texas Education Code Chapter 12, Subchapter D. The terms of the charter include: (a) this contract; (b) applicable law; (c) Request for Application (RFA) 701-11-108 (d) any condition, amendment, modification, revision or other change to the charter adopted or ratified by the Board or the Commissioner; and (e) all statements, assurances, commitments and representations made by Charter Holder in its application for charter, attachments or related documents, to the extent consistent with the aforementioned (a) through (d).
- 3. <u>Term of Charter</u>. The charter shall be in effect from the date of execution through July 31, 2018 unless renewed or terminated. The grant of this charter does not create an entitlement to a renewal of the charter. The charter may be renewed for an additional period of 10 years. It is understood by all parties that continued authority to hold the charter is contingent upon the school opening and holding classes beginning in the 2013-2014 school year as stated in RFA 701-11-108 unless the Charter Holder submits an amendment request to postpone the start date that is approved by the commissioner of education. However, it is further understood that the charter must begin operations no later than September 1, 2015. Failure to open the school and hold classes by September 1, 2015 shall render this contract null and void, and the charter shall automatically return to the board without the need for further action.

 <u>Revision by Agreement</u>. The terms of the charter may be revised with the consent of Charter Holder by written amendment approved by the Commissioner.

### Students

- 5. <u>Open Enrollment</u>. Admission and enrollment shall be open to any person who resides within the geographic boundary stated in the charter application and who is eligible for admission based on lawful criteria identified in the charter application. Total enrollment shall not exceed the maximum number of students set out in the charter application.
- <u>Non-religious Instruction and Affiliation</u>. Charter School shall not conduct religious instruction. Charter Holder and Charter School shall be nonsectarian in their programs, policies, employment practices, and all other operations.
- 7. <u>Children with Disabilities</u>. A charter school is a "local educational agency" as defined by federal law. Charter Holder must comply with the Individuals with Disabilities Education Act (IDEA), as amended by the Individuals with Disabilities Education Improvement Act of 2004, 20 U.S.C. §1401, et seq., and implementing regulations; Section 504 of the Rehabilitation Act of 1973 (Section 504), 29 U.S.C. § 794, and implementing regulations; Title II of the Americans with Disabilities Act (ADA), 42 U.S.C. §§ 12131-12165, and implementing regulations; Chapter 29, Texas Education Code, and implementing rules; and court cases applying these laws.
- Student Performance and Accountability. Charter Holder shall satisfy Chapter 39, Subchapters B, C, D, E, F, G, and J of the Texas Education Code, and related Agency rules, as well as the student performance accountability criteria stated in its application for charter.

# **Financial Management**

 Financial Management and Accountability. Charter Holder shall satisfy Chapter 12, Sections 12.104, 12.106, 12.107 and 12.111 of the Texas Education Code, and related Agency rules regarding financial management accountability.

## **Governance and Operations**

10. <u>Indemnification</u>. Charter Holder shall hold the Board and Agency harmless from and shall indemnify the Board and Agency against any and all claims, demands, and causes of action of whatever kind or nature asserted by any third party and occurring or in any way incident to, arising out of, or in connection with any acts of Charter Holder, its agents, employees, and subcontractors in performance of this contract.

# This Agreement

- 11. <u>Entire Agreement</u>. This contract, including all referenced attachments and terms incorporated by reference, contains the entire agreement of the parties. All prior representations, understandings, and discussions are superseded by this contract.
- 12. <u>Severability</u>. If any provision of this contract is determined by a court or other tribunal to be unenforceable or invalid for any reason, the remainder of the contract shall remain in full force and effect, so as to give effect to the intent of the parties to the extent valid and enforceable.
- 13. <u>Conditions of Contract</u>. Execution of this contract by the Board is conditioned on full and timely compliance by Charter Holder with: (a) the terms, required assurances, and conditions of RFA 701-11-108; (b) applicable law; and (c) all commitments and representations made in Charter Holder's application and any supporting documents (to the extent such commitments and representations are consistent with the terms of this contract).

By executing this contract, the Charter Holder represents that it understands that the Charter Holder, including any and all governance, at whatever level whether appointed or elected, employees, agents, and volunteers shall fully cooperate with every Texas Education Agency investigation and/or sanction deemed necessary by the commissioner based on authority and responsibility given to the commissioner in state or federal law. This means that the Texas Education Agency staff may conduct confidential interviews of charter school personnel and contractors outside the presence of representatives of the charter school's administration and board, and that failure to timely reply with reasonable requests for access to site, personnel, documents, or other materials and/or items is a material violation of the contract for charter.

- No Waiver of Breach. No assent, express or implied, to any breach of any of the covenants or agreements herein shall waive any succeeding or other breach.
- 15. Venue. Any suit arising under this contract shall be brought in Travis County, Texas.
- 16. Governing Law. In any suit arising under this contract, Texas law shall apply.
- 17. Laws and Rules Applicable. By executing this contract, the undersigned representatives of Charter Holder represent that they have read and understand the rules adopted by the Board and the Commissioner pursuant to Texas Education Code Chapter 12, Subchapter D and that they have had full opportunity to consult with their own legal counsel concerning said rules prior to executing this agreement. The undersigned representatives further understand and agree that: (a) this contract is contingent upon legislative authorization and the contract and the funding under it may be modified or even terminated by future legislative act; (b) the terms of this contract, and of the Seventeenth Generation open-enrollment charter created by this contract, include all applicable state and federal laws and all applicable rules and regulations; (c) state and federal laws, rules, and regulations may be adopted, amended or repealed from time to time; (d) all such changes to state and federal laws, rules, and regulations applicable to Charter Holder or to its charter school(s) may modify this contract,

as of the effective date provided in the law, rule, or regulation; and (e) a contract term that conflicts with any state or federal law, rule, or regulation is superseded by the law, rule, or regulation to the extent that the law, rule, or regulation conflicts with the contract term.

18. Eligibility and Authority. By executing this contract, Charter Holder represents that it is an "eligible entity" within the meaning of Section 12.101(a), Texas Education Code, and it is understood by all parties that if the Charter Holder loses its 501(c)(3) tax exempt status for any period of time through action of the Internal Revenue Service or any other action which renders the Charter Holder no longer an "eligible entity" within the meaning of TEC \$12.101(a), the charter contract shall be rendered void, and it shall automatically return to the State Board of Education without any other action having to be taken by the SBOE or by the commissioner.

The Charter Holder shall immediately notify the Commissioner of any legal change in its status, which would disqualify it from holding the charter, of any violation of the terms and conditions of this contract, or of any change in the chief operating officer of the Charter Holder. Charter Holder further represents that the person signing this contract has been properly delegated authority to do so.

Entered into this 3 day of June \_, 20 13

Texas State Board of Education:

Great Hearts America Texas:

Barbara Cargill, Chain Date

Dan Scoggin, Chair

6/3/13

Peter Bezanson, Superintendent/Chief Operating Officer

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