

## TEXAS EDUCATION AGENCY

APPLICATION

Application for an Open-Enrollment Charter School - Fourth Generation  
Coversheet

Type: Open Enrollment  
(check one) "75% Rule" ☒

Date of Submission: January 21, 2000

RFA#701-00-006

Name of Proposed School: THE I.D.E.A. ACADEMYMaximum Grade Levels to be served: 5 grade levels (4<sup>th</sup>-8<sup>th</sup>)Estimated 1<sup>st</sup> Year Enrollment 200 Max Enrollment 500Name of Sponsoring Entity: I.D.E.A. ACADEMY, INCORPORATED

Check one: ☒ 501(c)(3) nonprofit organization  
☐ Governmental Entity  
☐ College or University

SBOE District: \_\_\_\_\_

Starting Date: 08-14-00Chairperson of Board of Sponsoring Entity: Ms. TRACY EPPChief Executive Officer of Sponsoring Entity: MR. THOMAS TORKELOSONChief Executive Officer of School: MR. THOMAS TORKELOSONApplicant Mailing Address: 703 THORNWOOD MISSION TX 78572School Site Address: 117 N. 11<sup>th</sup> ST. DONNA TX 78537  
(If different from above)Contact Phone # 956 638 4332 Fax # 956 682-7619

Contact Email Address: \_\_\_\_\_

I certify that I have the authority as the Chief Executive Officer of the sponsoring entity designated above to make application for an open-enrollment charter school. I further certify all information contained in this application is complete and accurate, realizing that any misrepresentation could result in disqualification from the charter application process or revocation after award. I authorize the agency to investigate the references included in this application.

Thomas E. Johnson 1/20/2000  
Signature of Chief Executive Officer Of Sponsoring Entity/date

Tracy Epp 1/20/00  
Signature of Chairperson of the Governing Board of the Sponsoring Entity/date

Thomas E. Johnson  
Signature of Application Preparer Was this person paid? Yes ☐ No ☒

**Proposed School Data**

(This page not provided to review committee members)

Projected Student Populations (indicate estimated percentages):

75% Students "at risk of dropping out of school"10% Students requiring Special Education services48% Students of Limited English Proficiency94% Students of Economically Disadvantaged Families98% Minority StudentsWill the school require all teachers to be certified? NoWill the school require that all teachers be degreed with at least a bachelor's degree? YesWill the school allow an individual to serve as a paid employee of the school as well as member of the governing board? YesWill the school allow members of the same family to serve on the governing board? No

Has any member of the governing board or any professional person to be employed by the school

No Been convicted of a felony?No Been convicted of a misdemeanor?No Been involved in bankruptcy?

Has the sponsoring entity been involved in

No Litigation?No Sanctions from any state regulatory agency?

If YES to any of the above the applicant must give full disclosure and list all instances completely as required in other portions of the application.

The application preparer has viewed the training video provided at the Regional Education Service Center. yes X no

# IDEA Academy

## Individuals Dedicated to Excellence and Achievement

### State Charter Application Table of Contents

I. Evidence of eligibility of sponsoring entity	page 1
II. Community Support	page 5
III. Governance of sponsoring entity	page 7
IV. School Demographics	page 12
V. Business Plan	page 18
VII. Geographic Boundaries	page 21

### Information Reviewed by Review Committee

Introduction	page 22
VIII. Governance	page 23
IX. Vision of the School	page 27
X. School Goals	page 28
XI. General Description of School	page 37
XII. Educational Plan	page 40
The Appendix contains its own Table of Contents	

**I. Evidence of eligibility of sponsoring entity****A. Statement describing sponsoring entity**

The sponsoring entity, IDEA, Inc. was founded as a necessary prerequisite to attain state charter status for the IDEA Academy. In our Articles of Incorporation we describe that our fundamental mission is:

"to provide educational opportunities and assistance to children who are unable to achieve the same or have difficulty doing so for financial reasons. Another purpose is to help other individuals or groups establish similar educational assistance organizations in cities across the country."

The purpose of IDEA, Inc. is to serve as the non-profit, governing organization of the IDEA Academy.

**B. 501c3 Status**

Our 501c3 application is pending concurrently with this application, and has been submitted to the Internal Revenue Service. When we receive our determination letter from the IRS, IDEA, Inc. will submit a copy to Texas Education Agency, Division of Charter Schools.

**C. Articles of Incorporation**

ARTICLES OF INCORPORATION

OF

IDEA, Inc.

I, the undersigned natural person, a citizen of the State of Texas, and at least eighteen (18) years, acting as incorporator of a corporation under the Texas Non-Profit Corporation Act, do hereby adopt the following Articles of Incorporation for such corporation:

ARTICLE ONE

NAME

The name of the corporation is IDEA, Inc.

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

The purposes for which the corporation is organized are:

1. The initial purpose for which the corporation is formed is to provide educational opportunities and assistance to children who are unable to achieve the same or have difficulty doing so for financial reasons. Another purpose is to help other individuals or groups establish similar educational assistance organizations in cities across the country.
2. The purpose or purposes for which the corporation is organized are to receive and maintain a fund or funds of real or personal property, or both, and, subject to the restrictions and limitations hereinafter set forth, to use and apply the whole or any part of the income therefrom and the principal thereof exclusively for charitable, scientific, literacy, or education purposes either directly or by contributions to organizations that qualify as exempt organizations under Section 501 (c) (3) of the Internal Revenue Code 1986 and its Regulations as they now exist or as they may hereafter be amended.
3. No part of the net earnings of the corporation shall inure to the benefit of any Director of the corporation, officer of the corporation, or any private individual (except that reasonable compensation may be paid for services rendered to or for the corporation affecting one or more of its purposes), and no Director of officer of the corporation, or any private individual shall be entitled to share in the distribution of any of the corporate assets on dissolution of the corporation. 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 publication or distribution or statements) any political campaign on behalf of any candidate for public office.

## APPLICATION

4. The corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to tax on undistributed income imposed by Section 4942 of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.
5. The corporation shall not engage in any act of self-dealing as defined in Section 4941 (d) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.
6. The corporation shall not retain any excess business holdings as defined in Section 4943 (c) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.
7. The corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.
8. The corporation shall not make any taxable expenditures as defined in Section 4945 (d) of the Internal Revenue Code of 1986, or corresponding provisions of any subsequent federal tax laws.
9. Notwithstanding any other provision of these Articles of Incorporation, the corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from taxation under Section 501 (c) (3) of the Internal Revenue Code and its Regulations as they now exist or as they may hereafter be amended, or by an organization, contributions to which are deductible under section 170 (c) (2) of the Internal Revenue Code and Regulations as they now exist or as they may hereafter be amended.
10. Upon dissolution of the corporation or the winding up of its affairs, the assets of the corporation shall be distributed exclusively to charitable, scientific, testing for public safety, literacy, or education organizations which would then qualify under provision of Section 501 (c) (3) of the Internal Revenue Code and its Regulations as they now exist or as they may hereafter be amended.
11. The Corporation shall not have members.

## ARTICLE FIVE

### INITIAL REGISTERED OFFICE AND AGENT

The street address of the initial registered office of the corporation is 703 Thornwood Ave., Mission, TX 78572, and the name of the initial registered agent at such address is Thomas E. Torkelson.

## ARTICLE SIX

### BOARD OF DIRECTORS

The number of Directors constituting the initial Board of Directors of the corporation is three (3) and the names and address of the persons who are to serve as the initial directors are:

NAME	ADDRESS
Thomas E. Torkelson	703 Thornwood Ave., Mission, TX 78572
Tracy Epp	800 South I Rd Pharr, TX 78577
Thelma M. Balli	Box 2206 Alamo, TX 78516

ARTICLE SEVEN

INCORPORATORS

The name and street address of the incorporator is:

NAME	ADDRESS
------	---------

Thomas E. Torkelson	703 Thornwood Ave., Mission, TX 78572
---------------------	---------------------------------------

ARTICLE EIGHT

INDEMNIFICATION

A director of this Corporation shall not be liable to the Corporation or its stockholders for the monetary damages for breach of fiduciary duty as a director, except to the extent such exemption from liability or limitation thereof is not permitted under the General Corporation Law of the State of Texas as the same exists or may hereafter be amended.

Any repeal or modification of the foregoing paragraph shall not adversely affect any right or protection of a director of the Corporation existing hereunder with respect to any act or omission occurring prior to such repeal or modification.

**D. Bylaws of sponsoring entity**

BYLAWS

OF

IDEA, Inc.

ARTICLE I

IDENTIFICATION

1. Name: The name of the Corporation is IDEA, Inc.
2. Registered Office: The address of the registered office is: IDEA, Inc., 703 Thornwood Ave., Mission, TX 78572.
3. Seal: The corporate seal or any facsimile thereof shall contain the following legend:  
IDEA, Inc.
4. Financial Year: The financial year of the corporation shall be the calendar year, ending December 31st.

ARTICLE II

PURPOSES

The purposes of IDEA, Inc. will be as stated in its Articles of Incorporation.

To accomplish the purposes of the Corporation, as so stated, IDEA, Inc. will receive and maintain a fund or funds of real and personal property, or both, and, subject to the restrictions and limitations hereinafter set forth, to use and apply the whole and any part of the income therefrom and the principal thereof exclusively for charitable, scientific, literacy, or education purpose either directly or by contributions to organizations that qualify as exempt organizations under Section 501 (c) (3) of the Internal Revenue Code 1986 and its regulations as they now exist or as they may hereafter be amended.

IDEA, Inc. will perform such other functions as are consistent with the aforementioned purpose and relate to the common good.

ARTICLE III

MEMBERS

The Corporation will not have members.

ARTICLE IV

THE BOARD OF DIRECTORS



1. Number: There shall be not less than three (3) nor more than seven (7) directors. The number of directors may be increased or decreased at any time by amendment to these Bylaws by the Board of Directors. However, the number of directors shall never be less than three (3) and any decrease in number shall not have the effect of shortening the term of any incumbent director.

2. Term of Office: The term of the Board of Directors shall be for a period of three (3) years. Any vacancy occurring will be filled by an affirmative vote of the remaining directors. Thereafter, the directors shall serve such terms, not exceeding three (3) years, or as may be provided by resolution of such Board of Directors.

3. Vacancies: Vacancies may be filled by an affirmative vote of the majority of remaining directors.

4. Place of Meeting: Meetings of the Board of Directors may be held either within or without the State of Texas.

5. Meetings:

A. Regular Meetings: The Board of Directors shall meet on a regular basis if so determined by resolution of the Board of Directors. Such resolution shall state the time and place of such regular meetings and no further notice shall be necessary.

B. Special Meetings: Special meetings may be called by any director upon at least forty-eight (48) hours notice to the other directors. Such notice shall specify the time and place of such special meeting. However, attendance of a director at such a meeting shall constitute a waiver of notice of such meeting, except where a director attends a meeting for the express purpose of objecting to the transaction of any business on the ground that the meeting is not properly called or convened.

6. Quorum: A quorum for the transaction of business by the Board of Directors shall be a majority of the whole Board.

7. Action Without Meeting: Any action which is required by law to be taken at a meeting of directors, or any action which may be taken at a meeting of directors, may be taken without a meeting, if a consent in writing setting forth the action to be taken, shall be signed by all of the directors entitled to vote with respect to the subject matter thereof. Such consent shall have the same force and effect as a unanimous vote.

8. Officers of the Board: The Board of Directors shall elect, from any of the directors, a Chairman.

9. Committees: The Board of Directors may, by resolution adopted by a majority of the entire Board, designate three (3) or more directors to constitute an Executive Committee. Such committee shall have and exercise the authority of the Board of Directors in the management of the Foundation. The Executive Committee shall be subject at all times to the control of the Board. The Board of Directors may create other committee as needed.

10. Directors to Serve Without Compensation: Directors shall serve without pay and no funds of the Corporation shall ever be expended as compensation for the service of any director serving as director. This article does not preclude the Board of Directors hiring one of its directors to serve in a second capacity as the "Executive Director" for compensation; that director will not receive compensation for service as a member of the board of directors.

ARTICLE V

OFFICERS

1. Number: The Officers of the Corporation shall be a President, one or more Vice-Presidents, a Secretary, a Treasurer, and any such other officers and assistant officers as may be deemed necessary by the Board of Directors. Any two (2) or more offices may be held by the same person except that the President and Secretary shall not be the same person.
2. Election, Term of Office: The officers shall be elected by the Board of Directors. Each officer shall hold office until the successor thereto is elected and qualified or unless sooner removed or disqualified under Section 3 of this Article.
3. Removal: Any officer or agent elected or appointed by the Board of Directors may be removed by the Board of Directors whenever in its judgement the best interest of the Corporation will be served thereby; but such removal shall be without prejudice to the contract rights, if any, of the person so removed.
4. Vacancies: Any vacancy in any office because of death, resignation, removal, or by any other cause shall be filled by the Board of Directors.

ARTICLE VI

CORPORATE ACTIVITIES

1. Distributions: No assets of the Foundation shall be distributed to its directors or officers. Upon final dissolution or liquidation, the Foundation may make distributions as permitted by law.
2. Loans: No loans shall be made by the Foundation to its directors or officers.
3. Contracts: The Board of Directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Foundation, and such authority may be general or confined to specific instances.
4. Checks, Drafts, etc.: All checks, drafts or other orders for the payment of money, notes, or other evidences of indebtedness issued in the name of the Foundation, shall be signed by such officer or officers, agent or agents of the Foundation and in such manner as shall from time to time be determined by a resolution of the Board of Directors.
5. Deposits: All funds of the Foundation not otherwise employed shall be deposited from time to time to the credit of the Foundation in such banks, trust companies, or other depositories as the Board of Directors may select.

ARTICLE VIII

AMENDMENTS

The power to alter, amend or repeal these Bylaws or adopt new Bylaws is vested in a majority of the Board of Directors.

**E. Biographical Affidavits see Attachments**

**F. History of sponsoring entity**

This application request the financial history of the entity, a credit report, the most recent IRS filing, disclosure of any liens, and litigation history of IDEA, Inc. At the time this application was submitted to TEA, recognition from the IRS and Secretary of State's office was still forthcoming, and therefore we have no history of any of the above.

**II. Community Support**

**A.** The IDEA Academy has and will continue to use community input in the planning process of the charter school. Initially, a parent meeting was held to discuss interest, ideas, concerns and a strategic plan. We hold the belief that in order to be most effective we must involve the community as much as possible. Prior to applying for state charter, letters describing the IDEA Academy were sent to community leaders. Those who received the letters were invited and encouraged to visit the IDEA Academy to see first hand what it is we are trying to accomplish, how we are doing, and of course, to offer feedback and suggestions. We have also issued press releases soliciting community feedback, as well as planning a public hearing to answer questions and provide a forum for community input.

**B.** A public hearing was held on January 13, 2000 at the Donna Public Library. The meeting began at 5:30 and ended at 7:00pm. Notices were also posted at various businesses, churches and other public buildings. During the meeting, Tom Torkelson briefly explained the concept behind charter schools and why he felt that a charter school was needed in Donna. His talk lasted approximately ten minutes, and the remainder of the time was spent answering questions from parents and community members. Parents and students expressed a positive, supportive attitude at the hearing. Most people in attendance were in some way connected with the IDEA Academy, either as parents of former or current students, or as extended family of students.

**C.** Discuss any business arrangements or partnerships with existing schools, educational programs, businesses or non-profit organizations.

HEROES Academy  
Do Something  
Texas Migrant Council

Region One—Service Learning  
iMind

**D.** Five persons who are not directly involved with the school as employees or as board members, who will serve as references for IDEA, Inc. are:

Lisa A. Farias  
Teach For America-Rio Grande Valley  
Executive Director  
3700 N. 10<sup>th</sup> St. Suite 303  
McAllen, TX 78501  
956-630-6781

Ms. Farias has been a "sounding board" for the IDEA Academy since May 1999. She has discussed with us issues such as choosing a board, fundraising and development, and public relations.

Martin K. Winchester  
H.E.R.O.E.S. Academy—Cesar Chavez Elementary School, Pharr, TX  
Founder, Director and Teacher  
401 E. Thomas  
Pharr, TX 78577  
(956) 453-4376

Martin Winchester founded and directs the HEROES Academy, a component of Pharr, San Juan, Alamo I.S.D. The HEROES Academy is a 21<sup>st</sup> Century community service learning center funded by the U.S. Department of Education. Mr. Winchester, a highly respected educator in the Rio Grande Valley, has been a mentor to several members of the founding coalition of IDEA, Inc.

Caitlin R. Wittig  
Do Something  
Coordinator-McAllen, Texas  
800 S. I Rd.  
Pharr, TX 78577  
(956) 792-3929

Caitlin Wittig, teacher of the year at Options High School (1999) in McAllen, Texas, has worked with the IDEA Academy in community service efforts, in conjunction with the Do Something League.

Hannah Famiglietti  
Former Teacher and current medical school candidate  
1781 Spyglass Dr. #201  
Austin, TX 78746  
(512) 306-0804

Ms. Famiglietti taught at the IDEA Academy the 1998-99 school year before leaving to pursue her medical school ambitions.

Katherine DyReyes  
Former Teacher  
45 Symphony  
Boston, MA 02115  
(617)732-7981

Ms. DyReyes is currently pursuing her Masters Degree at Simmons University in Boston. She taught on the campus that housed the IDEA Academy and, as an outside observer, witnessed first hand the impact of the IDEA Academy and its operation within the context of the greater school community.

**E. Copy of statement published in newspaper**

**NOTICE OF INTENT TO APPLY FOR  
OPEN-ENROLLMENT CHARTER SCHOOL**

The IDEA Academy, Inc. is applying to the State Board of Education for approval to operate an open-enrollment charter school ("charter school") to be located in Donna, TX. Charter schools are public schools established by nonprofit organizations, institutions of higher education, or governmental entities. These schools are publicly funded and are free from many state regulations that apply to other public schools. The following descriptive information about the proposed school is being provided for the benefit of the community in which the school would be located if approved.

IDEA Academy, Inc. (Individuals Dedicated to Excellence and Achievement)

Chief Executive Officer, Mr. Thomas Torkelson

Board Members of sponsoring entity and school operating board:

Tom Torkelson

Thelma Balli

Tracy Epp

Proposed location: Donna, Texas

The IDEA Academy is an extended day, extended week program aimed at increasing student achievement through an accelerated academic program and high standards for achievement and personal conduct. Students of the IDEA Academy attend school until 5:00 each day and on Saturdays. The teachers and students of the IDEA Academy see hard work and dedication in school as their key to success in the future. Since 1998, the IDEA Academy has served 170 students in Donna I.S.D. and has functioned as a part of

Donna I.S.D. Currently the IDEA Academy is housed a Patricia Garza Elementary School in Donna, Texas.

Grade Levels to be served: Grades 4-7 for the 2000-2001 school year, grades 4-8, thereafter.

Opening date: August 2000

The State Board of Education invites comments about any aspect of the proposed school or its sponsoring entity. Comments must be communicated in the form of a signed letter to the State Board of Education. Only letters specifically addressing a proposed school will be considered by the board. Letters may be sent to the following address: Texas Education Agency, Division of Charter Schools, 1701 N. Congress, Austin, Texas 78701.

### **III. Governance of the Sponsoring Entity**

#### **A. Profile of the Founding Board and/or Initial Incorporators of the sponsoring entity.**

##### **1. Organizing group of initial incorporators:**

Tom Torkelson: The IDEA Academy was founded by Mr. Tom Torkelson in August 1998. After graduating from Georgetown University in 1997, Mr. Torkelson joined Teach For America, the national teacher corps whose vision is that "one day, all children in this nation will have the opportunity to attain an excellent education." Through Teach For America, Tom moved to the Rio Grande Valley and began teaching at Moye Elementary in Donna, Texas in 1997. During that first year Tom saw in his and other students in Donna potential and possibilities that had gone untapped. In collaboration with two fellow teachers, a supportive administration, and parents and students who wanted more out of their education, the IDEA Academy was born. In its first year, the IDEA Academy was so successful that more students wanted to be part of the program and parents asked for the IDEA Academy to expand up to the next grade so that their children could continue their academic success. Unfortunately, expansion in grade levels was not approved by the district, and for the 1999-00 school year, the IDEA Academy was moved to another campus in the district. The district would not provide additional transportation for the students who remained at the original campus.

During the summer of 1999, Mr. Torkelson worked as a School Director for the Teach For America summer institute in Houston, Texas. This position is essentially that of a principal. With the experience, Mr. Torkelson began to see the possibilities of running the IDEA Academy as an entity separate from Donna I.S.D.

Parents continue to approach Mr. Torkelson with questions about the possibility of their children again being part of the IDEA Academy. Currently, Mr. Torkelson runs

the IDEA Academy at Garza Elementary in Donna and he is one of the four teachers in the IDEA Academy.

Mr. Torkelson will serve as president of IDEA Inc., and IDEA Academy School Director, and is advocating for charter school status because he believes in the need of expanding the academic success the IDEA Academy offers to more students.

Barb Smigelski  
Teacher  
6743 S. Berkey Rd.  
White House OH 43571  
(419) 877-5790

Kevin Sharkey  
Counselor  
1001 North. H St. Aberdeen, WA 98520  
(503) 288-4924

Dave Tansel  
Sales Representative  
5314 Manore Swanton, OH 43558  
(800) 288-8579 ext 853

Tracy Epp: Upon graduating from Case Western Reserve University in 1997, Ms. Epp joined Teach for America and taught eighth grade American History and coached for two years. Currently Ms. Epp is the Program Director for Teach for America and serves as the liason between TFA-Rio Grande Valley and school districts. She oversees the progress, professional development, and overall classroom efforts of TFA teachers placed in the Rio Grande Valley.

Ms. Epp will be an advisory for curriculum and professional development as well as the overall education plan. She has been involved in the IDEA Academy's application for state charter because she has seen first hand the tremendous success of the IDEA Academy and believes in expanding the program to provide an excellent education to more students.

Laura Tartakoff  
Professor of Politics and Law  
Case Western Reserve University  
19909 Marchmont Rd.  
Shaker Heights, OH 44122  
(216) 751-1457

Barbara Hamele  
Assistant Director-Upward Bound  
University of Nebraska  
1109-F St. #1  
Lincoln, NE 68508  
(402) 435-1684

Iris Garza  
Cuellar Middle School  
1201 S. Bridge  
Weslaco, TX 78596  
(956) 969-6720

Thelma Balli: Thelma Balli graduated from University of Texas Pan American and taught for X years. During her teaching tenure she taught a variety of grades and content areas as both a regular- and special education teacher. Mrs. Balli was a curriculum Specialist for eight years, and principal for five years, and is currently the Assistant Director of Special Education for Donna ISD.

Ramone Garcia  
Hidalgo County Democratic Chairman  
222 W. University Dr.  
Edinburg TX 78539  
(956) 383-7441

Maria C. Rodriguez  
Assistant Superintendent Donna I.S.D  
116 N. 10<sup>th</sup> St. Donna TX 78537  
(956) 464-1834

Gillma Salinas  
1300 Yucca Ave.  
McAllen TX 78504  
(956) 630-0818

Daniel Hernandez: Mr. Hernandez served as superintendent for La Villa I.S.D. for seven years and for Edcouch-Elsa I.S.D. for seventeen years. He is currently a part time professor of education at the University of Texas-Pan American. As a superintendent for twenty-three years he brings great insight to the planning of the I.D.E.A Academy. Mr. Hernandez has served as a source of support in the areas of leadership and curriculum for the I.D.E.A. Academy since its inception. Because Mr. Hernandez believes in the vision of the I.D.E.A Academy and its methods for achieving its goals, he is a part of the organizing group for this charter application.



Mr. Andy Garcia  
 Superintendent; Donna I.S.D.  
 116 N. 10<sup>th</sup> St. Donna TX 78537  
 (956) 464-1834

Hannah Famiglietti  
 Former Teacher and current medical school candidate  
 1781 Spyglass Dr. #201  
 Austin, TX 78746  
 (512) 306-0804

Katherine DyReyes  
 Former Teacher  
 45 Symphony  
 Boston, MA 02115  
 (617) 732-7981

**3. Describe the governing body:**

a. Officer positions designated

President and IDEA Academy School Director  
 Vice President Treasurer  
 Secretary  
 Historian

b./c. Election and Removal of officers and of the governing body:

The officers shall be elected by the Board of Directors. Each officer shall hold office until the successor thereto is elected and qualified or unless sooner removed or disqualified under the following condition. Any officer or agent elected or appointed by the Board of Directors may be removed by the Board of Directors whenever in its judgement the best interest of the Corporation will be served thereby; but such removal shall be without prejudice to the contract rights, if any, of the person so removed.

d. Vacancies:

Any vacancy in any office because of death, resignation, removal, or by any other cause shall be filled by the Board of Directors. Vacancies may be filled by an affirmative vote of the majority of remaining directors.

e. Term for which members of the governing body serve:

The term of the governing body shall be for a period of three (3) years. Any vacancy occurring will be filled by an affirmative vote of the remaining directors. Thereafter, the directors shall serve such terms, not exceeding three (3) years, or as may be provided by resolution of such Board of Directors.

f. Whether terms are to be staggered:

Terms for the governing body will be staggered. One-third will initially serve a one year term, one-third will serve a two year term and the remaining third will serve the full three years; thereafter, every term will be three years for every member.

4. **Plans for further recruitment of founders or organizers of the school:**

At this point, we have no plans to further recruit founders or organizers of the school. However, as we raise public awareness, there is a possibility of an expressed interest. If this is the case and the party expressing interest is dedicated to the mission of the IDEA Academy, we will explore the possibility of adding the interested party to the group of founders and organizers.

B. School Management Board

1. **Biographical Affidavits**

The school management board will be comprised of those who comprise the sponsoring entity as listed in Section 1 above. See Attachments.

2. **Describe the following:**

a. Officer positions designated

President and IDEA Academy School Director  
Vice President Treasurer  
Secretary  
Historian

b./c. Election and Removal of officers and of the governing body:

The officers shall be elected by the Board of Directors. Each officer shall hold office until the successor thereto is elected and qualified or unless sooner removed or disqualified under the following condition. Any officer or agent elected or appointed by the Board of Directors may be removed by the Board of Directors whenever in its judgement the best interest of the Corporation will be served thereby; but such removal shall be without prejudice to the contract rights, if any, of the person so removed.

d. Vacancies:

Any vacancy in any office because of death, resignation, removal, or by any other cause shall be filled by the Board of Directors. Vacancies may be filled by an affirmative vote of the majority of remaining directors.

e. Term for which members of the governing body serve:

The term of the governing body shall be for a period of three (3) years. Any vacancy occurring will be filled by an affirmative vote of the

remaining directors. Thereafter, the directors shall serve such terms, not exceeding three (3) years, or as may be provided by resolution of such Board of Directors.

f. Whether terms are to be staggered:

Terms for the governing body will be staggered. One-third will initially serve a one year term, one-third will serve a two year term and the remaining third will serve the full three years; thereafter, every term will be three years for every member.

3. **Specify the extent to which any private entity will be involved in the operation of your charter school. Identify any members of the governing board or officers of the charter school who are affiliated with that entity:**

There is no private entity that will be involved in the operation of the IDEA Academy. All operational decisions will be made by the governing body and school and management board.

4. **The manner in which the charter school will conduct textbook selection:**

The adoption of textbooks will involve the input and approval of staff and school administration. In addition, parents will be invited to offer input as well. After evaluating textbooks from various companies (which are also on the Texas State adoption list) and ensuring they address the content covered in the TEKS, the IDEA Academy community will make a decision on textbook adoption.

#### IV. School Demographics (Reviewed by Agency)

##### A. School's enrollment projection:

School Year	The IDEA Academy School Grades	Total Enrollment
2000-2001	Fourth Grade through Seventh Grade	200
2001-2002	Fourth Grade through Eighth Grade	250
2002-2003	Fourth Grade through Eighth Grade	375
2003-2004	Fourth Grade through Eighth Grade	500
2004-2005	Fourth Grade through Eighth Grade	500

The IDEA Academy will serve grades 4 through 7 in its first year, every year thereafter, grades 4 through 8 will be served. Expected enrollment for the first year is fifty students per grade for a total of two hundred students. We are expected to have two groups of twenty-five per grade. Maximum students per

class will be thirty. If fourth grade enrollment exceeds twenty-two, a full-time aide will be hired for that classroom.

**B. Describe the community or region where the school will be located:**

The IDEA Academy will primarily serve the town of Donna, Texas. As the IDEA Academy expands beyond the first few years of operation, we will seek to serve students from the districts of Weslaco I.S.D and Pharr, San Juan, Alamo I.S.D. These towns comprise what is known as the "mid-valley" area.

The Rio Grande Valley is the stretch of land just north of the Mexico/United States border. Along this stretch a land, economic depression is apparent in the lives of many—particularly the students the IDEA Academy is seeking to serve. The "mid-valley" is speckled with what is commonly referred to as "colonias." Colonias are pseudo housing developments with sub-standard and oftentimes non-existent basic services, such as paved roads, drainage systems, running water, electricity and sewage systems. This is where the majority of IDEA Academy students live.

- C.** Donna was selected as the primary district to be served because of the need (see statement of need). While most of the districts throughout the Rio Grande Valley are classified as under-served or low-income, it is most apparent in Donna.

**V. Human Resource Information (Reviewed by Agency)**

**A. Human Resource Policies**

All hiring and dismissal decisions will be conducted through a joint effort between the School Director, a hiring committee (composed of current staff), and the Board of Directors. All policies will be described in detail in a policy manual which will be given to all staff on the first day of employment and a statement that it has been read will be signed by staff. All staff and faculty will receive five (5) sick days per year, which can be rolled over if unused, as well as five (5) personal days per year. A comprehensive benefits package will be provided including medical, dental and life insurance, and the Texas Teacher Retirement System. A salary schedule, a sample contract, and table of contents for policies are provided in Attachments.

**B. Administrators**

- 1) Biographical Affidavit for each administrator of the school. See Attachments
- 2) Powers and Duties
  - a) Mr. Tom Torkelson will be the school's Chief Executive Officer (an organizational governance chart is in the Attachments).

- b) Mr. Torkelson has served as director of the IDEA Academy for two years in which he has organized the day to day operations as well as long-range goals, budgeted money provided by the district and received through grants (written by him as well). Also, Mr. Torkelson served as a school director at the Teach For America summer institute in 1998. Duties included selecting professional support staff; overseeing the professional development of the sixty-nine teachers on campus; organizing community outreach events; developing relations with parents; responding to complaints/concerns.
- c) All academic and financial leaders of the IDEA Academy will be professionals with the appropriate degree(s). In addition, all leaders must be committed to the goals and vision of the IDEA Academy. All hiring decisions must be approved by the governing body.
- d) Job descriptions for the CEO, school academic director, financial director and other administrative personnel.

**Chief Executive Officer/School Director:** The CEO/School Director will direct, manage and provide leadership for the entire school community. Responsibilities include, but are not limited to a complete understanding of operations, budgeting, curriculum, faculty development and evaluation of all staff. The CEO/SD will also play a leading role in establishing performance goals for student achievement.

**Dean of Instruction:** The Dean of Instruction will provide supervision and direction to the areas of curriculum, instruction, assessment and staff development. The Dean of Instruction will also be responsible for meeting with individual teachers to strategize effective teaching practices and ensure that curriculum and instructional goals are being met.

**Financial Director:** The Financial Director will be responsible for overseeing all business and development aspects of the IDEA Academy. Responsibilities include operating accounting systems, personnel, purchasing, payroll, accounts payable, benefits administration, revenue, grant-writing and investing to ensure financial stability of IDEA, Incorporated.

**Administrative Assistant:** The Administrative Assistant will be responsible for overseeing the daily operations of the office. Duties include reception, public information and dissemination of IDEA Academy programs, and scheduling for and assisting the School Director.

**Office Manager:** The Office Manager will be responsible for entry of PEIMS information including attendance, grades and student information. Additional duties include contacting absent students and assisting the Financial Director.

**Counselor:** The Counselor will provide both academic and emotional support services to all students. In addition to responding to teacher referrals, the counselor will work with students through presentations and individual planning. The counselor will also serve as a liaison between students and families and various social service organizations.

**Teacher:** All teachers will be responsible for the achievement and academic excellence of their students. Teachers will engage a variety of instructional strategies to meet the needs of all students while providing both a rigorous and unique classroom learning environment to ensure all students meet the performance objectives established by the school as well as the TAAS and TEKS. In addition to ensuring student achievement, teachers will also be responsible for their own professional growth and development.

- e) Evaluation of administrative personnel will be conducted through the *IDEA Academy Management Effectiveness Survey* (see attachment). This survey, completed by all staff members, evaluates the administration's ability to:
- build a team of staff members who attain outcomes based on high expectations, exemplify the IDEA Academy's operating principles and ensure they are in positions that are well-suited to their skills;
  - ensure staff members assume responsibility for meeting goals; ensure staff members have the information they need to be effective;
  - fosters a culture where staff members desire, seek out, and give constructive feedback that will help them meet their goals;
  - is an accessible resource who helps staff members attain results as efficiently as possible;
  - ensures their staff operates at the highest possible level by helping them maximize their strengths and tackle their weaknesses;
  - ensure staff members feel their contributions are valued; invests staff member in the school decision making process; and
  - ensures staff members feel positively about working at the IDEA Academy.
- f) The salary range and benefits for administrative staff will follow the same schedule for that of teachers, but will include compensation for days beyond the overall school calendar.

### C. For Faculty and Staff (Reviewed by Agency)

1. All classroom teachers and staff will be required to hold a bachelor's degree, as well as at least one year teaching experience. All teachers will also be required to be certified or working towards certification in the state of Texas as well as towards the National Board of Certification.
2. The targeted staff size for the first year of operation will be eight classroom teachers; two administrators/teachers; one financial director; one counselor; one physical education teacher; one fine arts teacher; and three support staff (janitors, secretarial, etc.) for a total of 17. The teacher-to-student ratio will be one teacher to sixteen students.
3. Proposed faculty and staff if possible:  
At the time of submitting this application, faculty and staff have not yet been identified.
4. In addition to using the Texas Professional Development Appraisal System (PDAS) to evaluate faculty and staff; parents and students will complete effectiveness surveys and every teacher will also be evaluated using the *IDEA Academy Professional Development and Evaluation System* (see attachments). In addition, the administration will conduct two classroom observations and post-conferences for every teacher as well.
5. Provide complete job descriptions of all charter school faculty and staff, including instructional and non-instructional duties.

**Chief Executive Officer/School Director:** The CEO/School Director will direct, manage and provide leadership for the entire school community. Responsibilities include, but are not limited to a complete understanding of operations, budgeting, curriculum, faculty development and evaluation of all staff. The CEO/SD will also play a leading role in establishing performance goals for student achievement.

**Dean of Instruction:** The Dean of Instruction will provide supervision and direction to the areas of curriculum, instruction, assessment and staff development. The Dean of Instruction will also be responsible for meeting with individual teachers to strategize effective teaching practices and ensure that curriculum and instructional goals are being met.

**Financial Director:** The Financial Director will be responsible for overseeing all business and development aspects of the IDEA Academy. Responsibilities include operating accounting systems, personnel, purchasing, payroll, accounts payable, benefits administration, revenue, grant-writing and investing to ensure financial stability of IDEA, Incorporated.

**Administrative Assistant:** The Administrative Assistant will be responsible for overseeing the daily operations of the office. Duties include reception, public information and dissemination of IDEA Academy programs, and scheduling for and assisting the School Director.

**Office Manager:** The Office Manager will be responsible for entry of PEIMS information including attendance, grades and student information. Additional duties include contacting absent students and assisting the Financial Director.

**Counselor:** The Counselor will provide both academic and emotional support services to all students. In addition to responding to teacher referrals, the counselor will work with students through presentations and individual planning. The counselor will also serve as a liason between students and families and various social service organizations.

**Teacher:** All teachers will be responsible for the achievement and academic excellence of their students. Teachers will engage a variety of instructional strategies to meet the needs of all students while providing both a rigorous and unique classroom learning environment to ensure all students meet the performance objectives established by the school as well as the TAAS and TEKS. In addition to ensuring student achievement, teachers will also be responsible for their own professional growth and development.

#### **D. Code of Conduct**

**1. Describe in detail your school rules or guidelines governing student behavior.**

The IDEA Academy's approach to student conduct has been and will continue to be very simple, straight-forward, and explicit. Every student at the IDEA Academy is held to the highest expectations in both academics as well as behavior. It is our policy that no time be taken away from learning due to student misconduct. Before entering the IDEA Academy, all students, parents and teachers sign the IDEA Academy Commitment to Excellence and Achievement, known simply as the "contract." This contract outlines the following requirements for student behavior (see Attachments). In addition, students are held to all local, state and federal criminal laws.

**2. Describe your school's policies regarding student expulsion and suspension. Include a description of procedures that satisfy due process requirements:**

Students may be suspended for any conduct or action deemed inappropriate by the school or violation of the IDEA contract. Because an integral part of the IDEA Academy's success is dependent upon parental involvement, we anticipate very few, if any, serious behavioral disruptions. However, we will have systems in place in the event that a student may need to be suspended or even expelled. Students may also be suspended for general misconduct violations as defined in the student code of conduct to be distributed the first day of school. Students may be suspended for as many as three school days per behavior violation. In order to ensure due process, a student who is suspended or facing expulsion will be given a conference by the school director, teacher (if applicable), parent and student in which the student will be advised of the conduct with which he or she is accused. The student will



be given the opportunity to explain his or her viewpoint. The number of days of a student's suspension will be determined by the School Director or other appropriate administrator. In the event that a long-term suspension or expulsion is necessary, the student will be placed in an Alternative Education Program (AEP). The student's placement in an AEP will be determined by the School Director, teacher and parent. The IDEA Academy will decide on a case by case basis whether to place a student in an AEP.

**3. Describe your school's mandatory student attendance plan and its fit with the code of conduct and the mission of the school.**

As outlined in the "contract" students promise to attend school every day. In the event they are unable to attend, they are required to call their teacher, explain the circumstances and do all of the missed work. We expect our students to be present every day—we consistently send the message that in order to achieve and succeed, learning time must be maximized. If, in the unlikely event, a student's absences become excessive, a meeting with the parents, students, teachers and administrators will be conducted to see what can be done to correct the situation. As stated above, the "contract" is the document which governs student, parent and teacher expectations for both academics and behavior. From the onset, we invest our students and their families in this so that we may achieve our mission of providing an excellent education and pushing our students to the highest of academic levels.

## **Business Plan**

### **A. Financial Management**

- 1. Preliminary startup budget: See Attachment**
- 2. Three year budget: See Attachment**
- 3. Three year cash flow projection: See Attachment**
- 4. Fundraising**

The IDEA Academy does plan to conduct fundraising efforts to general capital and to supplement the ADA. The ultimate goals in our fundraising efforts are: to have funds for a permanent building site; to have funds to take each student on a field experience trip each year for every grade level; and to have financial stability so that the school will be able to meet its needs. Activities are not yet planned, but will be coordinated by our financial director as well as board members and a development committee.

**5. Proposed Business Procedures Handbook:**

The document the IDEA Academy will use for business procedures and daily operating forms has been created by the original incorporators; *The IDEA Academy Business and Personnel Manual*. Because the document is over one-hundred pages long, we have attached a table of contents in the Attachments. A copy of this manual can be furnished upon request.

6. **Proposed monthly budget status report to the board of directors:** See Attachment (Business Cash Flow Report)

7. **Financial accounting and payroll accounting system:**

The IDEA Academy will use the RSCCC business software system. This service will be setup and maintained through Region One Education Service Center in Edinburg, Texas. The RSCCC, Regional Service Center Computer Cooperative has the capacity to use the financial accounting system in the PEIMS.

## **B. Facility Management**

1. **Description of and address for the physical facility.**

The proposed facility for the initial two years of the IDEA Academy will be the First Baptist Church Classroom Building at 117 N. 11<sup>th</sup> St. in Donna, Texas. This building is a two-story facility with nine classrooms, a cafeteria, an office space, and several acres of land behind the building for use during physical education and/or possibly portable classrooms. The facility is within walking distance to a public park and the Donna Public Library.

2. **Explain why this site would be a suitable facility for the proposed school. Address the necessity of renovation to the facility and compliance with applicable building codes. Describe the services of the facility including heating, ventilation, and lighting, sanitary conditions and water supply.**

This site is a suitable facility for several reasons. First, it meets our size needs and the building is intended for classroom use. Second, the location is a central one, as well as very close to the public park and library. Current restroom facilities are not sufficient, however we are working with the building architect to renovate those facilities. The building does have the services of heating, ventilation and lighting and water supply.

3. **Describe special use areas of the facility including playground/athletic areas, cafeteria, laboratories, general assembly areas, etc.**

Special use areas include several acres of land to be used for the playground/athletic area as well the public park, located very close. The cafetorium will be used for serving breakfast and lunch as well a place for school-wide meetings and assemblies.

4. **Discuss any progress, partnership developments or future steps towards acquisition of a facility/land.**

Currently there are no partnerships or progress in place towards acquisition of a facility/land. The ultimate goal of the IDEA Academy is to create a permanent campus. The development campaign will begin in fall 2000. We aspire to have a permanent site by our third year of operation.

5. **Attach a copy of a lease agreement, deed to property or purchase agreement as applicable**

### **C. Student Attendance Accounting**

The IDEA Academy will work with Region One Education Service Center to set up its school attendance accounting procedure. The computer program to be used is the **RSCCC**, the Regional Service Center Computer Cooperative. The RSCCC is a program designed by Region Twenty and has the capacity to handle all student information systems including attendance, grades and student information. This program will convert all information to PEIMS data and will be submitted by Region One Education Service Center in Edinburg, Texas. The contact person who will be setting up this program with the IDEA Academy at Region One is Mike Burkholder. He can be reached at (956\_984-6086 for questions about the capacity of the computer program.

A school calendar for the 2000-2001 school year is in the Attachments.

#### **Draft Board Policy on students eligible for a public education grant.**

The IDEA Academy will accept any student under the PEG if they and their parents agree to sign the IDEA Academy Contract and have a desire and understanding to be part of the unique program offered by the IDEA Academy.

### **D. Transportation and Food Services**

1. **Describe provision for transportation for students served by the charter school. (Include provision for special education services).**

The IDEA Academy will provide transportation for all students who reside in the town of Donna, Texas. Provisions for any special needs will be coordinated by the school. We will be contracting bus services through Laidlaw Bus Lines.

2. **Describe the provisions for food service, if any, for students served by the charter school, include plans for free or reduced lunch and breakfast programs.**

The IDEA Academy will provide breakfast and lunch to all students. We will be participating in the free and reduced lunch and breakfast programs. Because we anticipate that over ninety percent of the student population will

qualify for free lunch, we plan to offer free lunch to all students. Cafeteria services will be contracted out.

**VII. Geographic Boundaries and Statements of Impact**

**A. Geographic Boundaries**

- 1. Describe the geographic area to be served by the school. Include a map showing boundaries clearly marked. Include a written description that clearly explains the area to be served.**

The primary area to be served by the IDEA Academy is the town of Donna. If, after our applicant cutoff date, our enrollment has not been filled, we will open up enrollment to students of any other district in the Rio Grande Valley, particularly Pharr, San Juan Alamo I.S.D and Weslaco I.S.D. We will use the town limits drawn by the school districts of each of these towns, meaning any student that would be served by the above districts will be invited to enroll at the IDEA Academy. Attached are maps for the Rio Grande Valley and Donna I.S.D.

- 2. Provide a list of all districts within the geographical area that may be affected by the charter school, including those districts from which the charter school will accept transfers.**

Donna I.S.D.; Weslaco I.S.D; Pharr, San Juan, Alamo I.S.D.

**B. Statements of Impact**

A statement of impact letter and form was sent to Donna I.S.D. on January 19, 2000. Attached is a copy.

**IDEA Academy**  
**Individuals Dedicated to Excellence and Achievement**

**State Charter Application Table of Contents**

**Information Reviewed by Review Committee**

Introduction	page 22
VIII. Governance	page 23
IX. Vision of the School	page 27
X. School Goals	page 28
XI. General Description of School	page 37
XII. Educational Plan	page 40

The Appendix contains its own Table of Contents

## Introduction

The community of Donna, TX is located in the Rio Grande Valley on the U.S.- Mexico border. The community is ravaged by gangs and crime, and is served by an educational system that is in drastic need of reform. It was in this community that three teachers began their careers several years ago. At the end of their first year of teaching, they felt that the traditional framework for public education simply was not doing enough for their students, nearly all of whom were minorities from economically disadvantaged *colonias* (subdivisions often lacking in water and other basic utilities). It was clear to these teachers that a better approach to education was necessary, and, at the end of their first year of teaching, they resolved to make a change. With the permission and funding of the local school district these teachers designed and implemented a program aimed at raising their students' achievement to a level comparable to students from the best schools in the nation. The program was named the IDEA Academy (Individuals Dedicated to Excellence and Achievement).

The premise behind the IDEA Academy is simple: if students are to read and write better and develop improved math skills, they need to attend school longer, take more challenging courses, and work harder. This commitment to hard work is matched by strict codes for student discipline and conduct. Students, parents, and teachers decide to make an enormous commitment when they register for the IDEA Academy. All IDEA Academy students choose to attend school from 7:30 a.m. until 5:00 p.m. during the week and from 9:00 a.m. until 1:00 p.m. on Saturday. IDEA Academy students choose to spend 40% more time in school than any other students in the Rio Grande Valley.

By the end of the first year, the results of the hard work began to show. Passing rates for TAAS Math increased from 70% before entering the IDEA Academy to over 95% after just one year. Reading scores also soared from a 69% passing rate to 86%. Furthermore, students came to appreciate the "tough love" approach to education where they were engaged in an exciting educational curriculum that challenged them each day.

After the success of the first year, demand for the program swelled to 104 students for the 1999-2000 school year and students, teachers, and parents began to seek greater autonomy from the school district and requested that the program be expanded to serve sixth and seventh grade students. When these demands weren't met, a collaborative decision was made to apply for state charter status so that the educational journey these students and teachers began could be continued.

## **VIII. Governance Structures and Processes**

### **A. Continuity of Vision**

A strong, clear vision and sense of purpose provide the philosophical and ethical compass to the leadership of an organization. Therefore, it is vital that the vision of the IDEA Academy's founders is sustained across the span of time and throughout variations in leadership and personnel. To ensure a continued, transcendent vision that remains true to the founding inspiration:

1. Members of the founding coalition will constitute a majority of the first governing board;
2. All prospective board members will visit the IDEA Academy, meet with a representative group of parents, teachers, and students to gain a clear sense of what lies at the heart of the IDEA Academy's mission;
3. All board members will sign the Board Member Commitment to Excellence and Achievement, which is based upon the contract signed by all students, their parents/guardians, and teachers. This contract sets forth the requirements and responsibilities for IDEA Academy board members and proactively affirms their commitment to the founding mission and goals of the IDEA Academy;
4. An official board historian will document important IDEA Academy decisions, events, and trends, to create an institutional memory. This ever-changing historical document will illustrate ways in which the initial inspiration took shape, how it has evolved, and how it can continue to grow and exert influence in the context of day-to-day operations.

### **B. Roles and responsibilities of the Board of Directors:**

The IDEA Academy and IDEA Academy, Inc. work collaboratively to ensure that every policy formed and every decision made help create students dedicated to hard work, academic success, and integrity. Specifically, it is the responsibility of IDEA Academy, Inc. to hold the school director accountable for the academic and financial management of the IDEA Academy. The Board of Directors and Officers will ensure that the IDEA Academy meets academic goals and adheres to policies and guidelines set forth in this charter. IDEA, Inc. will be accountable to the State Board of Education and the Texas Education Agency for the proper operation and maintenance of the IDEA Academy Charter. Specifically, the Board of Directors is charged with the following responsibilities:

1. Appointing the IDEA Academy School Director, who will serve as the academic and administrative leader;
2. Approving the annual operating budget;
3. Approving the hiring and termination of all school personnel, both professional and support staff;
4. Holding the school director accountable for the academic goals and fiscal management of the school;
5. Ensuring that the IDEA Academy meets goals set forth in this charter and adheres to the Texas Education Code;

6. Aiding in strategic planning, fundraising, marketing, and providing general support and services to the school; and
7. Fulfilling its prescribed duties in managing the effective resolution of complaints.

### **C. Complaints**

Thus far, the IDEA Academy has received very few complaints from parents and employees, a result of our proactive approach to solving small problems before they become serious.

#### **Proactively Dealing with Complaints**

We encourage staff to speak directly to the person(s) with whom they have an issue or complaint. While sometimes uncomfortable, this direct feedback approach is the best long-term solution to solving problems and creating an environment of trust, openness, and professionalism. Whether the conflict is between a custodian and a teacher, or between a teacher and administrator, the most effective way to resolve the problem is through direct, albeit polite, feedback. We spend a considerable amount of time in the beginning of the school year creating this dynamic of open feedback when we establish our norms for interaction.

Expediting complaints from parents often involves a nuanced, varied approach depending upon each circumstance. Skillful teachers and administrators often handle minor complaints over the course of a month and resolve the problems in subtle, informal, yet highly effective ways. They build trust by listening to parents, understanding their perspective, and creating solutions that are fair and just. Since our parental involvement (as outlined in VIII.E) fosters a true spirit of cooperation, parents understand that the teachers and staff are "on their side," which is invaluable when complaints do arise.

#### **Formal Complaint Protocol**

Despite our proactive approach, we realize that parents may have complaints requiring formal procedures to ensure fair, speedy action, and that employee complaints sometimes concern sensitive, uncomfortable, or even legal matters. In such cases we encourage staff members and/or parents to follow these procedures:

- a. File a formal complaint in writing with the school director, who will take appropriate action, which may include mediating the complaint between the two parties, investigating the complaint further, or directing the complaint to the Complaint Management Task Force. The school director will provide a written response outlining actions taken to the person lodging the complaint and any other affected parties;
- b. In the event that the person filing the grievance has a complaint with the school director, he or she should then either file the complaint with the Dean of Instruction or present a formal complaint directly to the Chairman of the Complaint Management Task Force. The Complaint Management Task force will investigate the matter, determine necessary steps to ensure an appropriate resolution to the complaint, and report all findings and recommendations in writing to the Board of Directors and any other affected parties. The



Complaint Management Task force will empower the Task Force Chairman to pursue any other necessary actions to comply with legal and ethical requirements:

- c. Should the complaint involve members of the complaint management task force, the individual(s) against whom the complaint is filed will recuse him/herself from the task force as the investigation and findings continue;
- d. Any actions or recommendations for action by the Complaint Management Task Force will be reported to the Board of Directors in a closed session open only to those directly involved. All decisions of the complaint management task force can be appealed by any of the parties to the Board of Directors, which will then decide upon further action.

The goal of this process is to guarantee a fair and ethical system for responding to complaints. The key is that our process is formal enough to ensure fairness in addressing complaints and flexible enough to respond to special circumstances. Parents and employees will be provided a copy of this policy in writing at the beginning of the school year.

#### **D. Ensuring a Productive Relationship between teachers, administration, and directors of the board.**

Trust, cooperation, and collegiality among staff is vital to the success of a school. These principles, combined with a shared belief that minority students can achieve at high levels, establish an environment in which teachers, administrators, and support staff are driven by a clear sense of purpose and possibility.

To this end, we at the IDEA Academy have put a great deal of thought and effort into creating the best possible relationship between teachers and administrators. One unique feature of the IDEA Academy is that administrators are required to teach for at least a portion of each school day--the current director of the IDEA Academy teaches a full day of class every school day and future administrators will continue to spend at least a half-day teaching. When administrators receive a daily reminder of the realities of being a classroom teacher, teachers and administrators are able to view each other as peers united by a common cause. Furthermore, administrators remain continuously in touch with the ways in which they can best support and aid teachers.

We believe in empowering teachers to truly feel comfortable questioning, challenging, and offering alternatives to administrative decisions or school policies. Before the school year begins, teachers, administrators, and directors cooperatively establish "norms for interaction," a set of guidelines and ground-rules for staff communication and interaction on both a professional and personal level. This is a first step in creating a culture where individuals understand that reasonable people can disagree and actively debate ideas and issues in a way that heightens everyone's critical thinking. The reality of human nature ensures that at some point there are bound to be disagreements and differing approaches to educational issues. Rather than pacifying and placating disagreements, we will continue to view this respectful clash of ideas and the thought that such debate brings as necessary to progress.

The "feedback loops" that will ensure a positive teacher-administrator relationship are:

- 1. Monthly one-on-one meetings between the school director and each teacher;

2. Quarterly Reflection meetings, in which teachers and staff reflect on the overall climate of the school and what can be done to maintain or improve it;
3. Weekly team meetings between teachers of the same grade level/department and the school director or dean of instruction; and
4. Continual establishment of "buy-in" from teachers by soliciting their opinions and thoughts on a wide range of issues.

## **E. Parental and Student Involvement in Decision-Making**

The involvement of students and parents is an important component of the IDEA Academy's decision-making process. Their influence is two-fold: they provide a direct voice as members of the shared decision making committee, and they provide ongoing feedback that indirectly influences the direction of the school.

### **Student Involvement**

*Our commitment to instilling within students the values of a free, democratic society capable of self-determination is reflected in our students' interactive role in the decision-making process.*

Monthly Student Meetings: Student discussion meetings are currently held each month, providing students an opportunity to discuss issues relevant to their education. All students are empowered to place items on the agenda. These monthly meetings are an important channel of communication between the school staff and the student body.

Quarterly Student Surveys: Two times each semester students provide the teaching staff direct feedback on the quality of instruction, the content of the curriculum, and the overall climate of the school. The anonymous surveys contain multiple choice questions as well as a space for students to make general suggestions and observations.

Student Representatives: Two student representatives, selected by their peers, will serve as representatives to the Shared Decision Making Committee.

### **Parental Involvement**

Parental Action Committee: Just as the students have a forum to express their views on the IDEA Academy, the Parental Action Committee (PAC) provides such a vehicle for parents. The PAC meets on a monthly basis. Its agenda is set by the PAC Steering Committee, a five-member panel elected by the PAC itself. The PACSC facilitates discussions on educational topics, among them: student dress code, curriculum, homework policy, fundraising efforts, discipline, and overall familial involvement.

Quarterly Parental Surveys: Two times each semester, parents provide the teaching staff and administration direct feedback on the quality of instruction, the content of the curriculum, and their overall satisfaction with the school. The anonymous surveys contain multiple choice questions as well as a space for parents to make general suggestions and observations.

**Shared Decision Making Committee:** Consistent with the vision and mission of the IDEA Academy is our collaborative approach to decision-making. Families, students, teachers, and community members come together to ensure that all policies and decisions support the school's overarching mission. The IDEA Academy SDMC is charged with making decisions in regards to student achievement, curriculum, extracurricular activities, field lessons, staff development, student discipline policies, and overall educational plan. The eleven-member committee is elected by secret ballot and serves for two years, although the initial committee member terms will be staggered. In the event of a vacancy, the school director will appoint a replacement subject to the approval by the SDMC.

The members of the SDMC will reflect the community we serve, and will be composed of:

- Three IDEA Academy teachers;
- One non-instructional staff member;
- One member of the community;
- Two family members or guardians of IDEA Academy students;
- Two students;
- The school director; and
- One member of the Board of Directors.

Meetings will be held the first Tuesday of each month, and emergency meetings will take place on an as-needed basis. The meetings are open to all, and are led by the school director. The committee secretary will keep the minutes of all meetings. The agenda for the meetings will be set the Friday prior to each meeting. Any member of the community can request that an item be placed on the agenda. Request forms will be available at the main office.

An important function of the SDMC is to appoint task forces to closely examine and report on issues requiring more in-depth consideration. Task force chairs report their findings and/or make recommendations to the SDMC at regularly scheduled meetings.

## **IX. Vision and Goals**

### **Mission Statement**

The IDEA Academy is dedicated to creating students who possess the necessary academic, intellectual, and character traits to succeed in college and the increasingly competitive world that follows.

### **Vision Statement**

*The basic components of the IDEA Academy have been in place since the 1998-99 school year, when Donna ISD approved the program as a "school within a school." Therefore, our overarching vision is to transform a highly effective program into an even more effective charter school.*

The faculty and staff of the IDEA Academy are dedicated to cultivating in students the understanding that hard work and dedication in school are the keys to success in the future. At the same time, students in the IDEA Academy must be as concerned with doing good as they are with doing well. Our students will develop intellect with character, hard work with compassion, and a commitment to excellence combined with a sense of social justice. We aspire to create a core of students aware that what they learn in the classroom empowers them to transform their community in positive, meaningful ways.

We seek to create a school competitive with the best private and public schools in the nation; one which demonstrates that through hard work and discipline, minority students from economically depressed areas can achieve at levels comparable to their peers in affluent communities. It is our desire to create a tradition of excellence that serves as a shining example of the potential power of public education.

Our ultimate vision, the one that focuses, clarifies, and intensifies the efforts of students, staff, and parents, is to create students who have the skills and desire to make success in college not only a possibility, but a probability.

### **Realizing the Vision**

The teachers, students, and parents of the IDEA Academy are united by the belief that there are no shortcuts to a good education. There is no easy way to teach all children how to read, just as there is no magic method to teach children how to succeed in math. Hard work on the part of the students and high-quality instruction from teachers is the only way to ensure that all children attain an excellent education. It is this basic philosophy that drives every lesson taught, each decision made, and all policies implemented at the IDEA Academy.

This hard work and purposeful pursuit of educational excellence takes the form of a longer school day and week, higher standards for academic success, and exemplary student conduct. To achieve these results, we engage students in a rigorous and enjoyable educational experience. Our approach is to raise achievement levels through an accelerated curriculum that demands increased responsibility from students while offering them an opportunity to participate in a challenging curriculum and a high quality after school program.

Too often in education, different teaching philosophies have been viewed as competing, not complementing. In the IDEA Academy, our teachers draw from the best practices that different pedagogical approaches offer, with the realization that a balance of strategies will reach the greatest number of students and their diverse needs. The fourth through eighth grade IDEA Academy campus will continue to combine E.D. Hirsch's *Core Knowledge Sequence* with the TEKS and a high quality service learning and character education curriculum developed with *Do Something*, the national community service organization. In addition, high quality enrichment activities will continue to expose and immerse students in educational opportunities that expand their world view.

### **X. School Goals**

*Our goals for student achievement are based on high, attainable expectations. Our past success, combined with the success of the two TEA-rated exemplary charter schools after which our charter school is modeled, provide clear proof that our goals are attainable, regardless of our students' past levels of achievement.*

**A. Student Goals**

1. Reading: IDEA Academy students will develop reading comprehension skills that enable them to read on or above grade level.

Performance Objective	2000-01	2001-02	2002-05	Measurement tool*
1. Percentage of students who will pass the Reading Section of the Texas Assessment of Academic Skills	85%	90%	95%-100%	<ul style="list-style-type: none"> <li>• TAAS Reading</li> </ul>
2. Percentage of students who will improve their Texas Learner Index by an average of 15 percent over their previous TAAS scores or attain a minimum TLI of 80%.	85%	90%	95%-100%	<ul style="list-style-type: none"> <li>• TAAS Reading</li> </ul>
3. Percentage of students reading below grade level who will improve 1.75 years for each year they are in the IDEA Academy.	85%	90%	95%-100%	<ul style="list-style-type: none"> <li>• Stanford 9</li> <li>• OLSAT</li> <li>• Individual Reading Inventories</li> <li>• TAAS Reading</li> </ul>
4. Percentage of students reading on grade-level who will improve 1.5 years for each year they are in the IDEA Academy;	85%	90%	95%-100%	<ul style="list-style-type: none"> <li>• Stanford 9</li> <li>• OLSAT</li> <li>• Individual Reading Inventories</li> <li>• TAAS Reading</li> </ul>
5. Percentage of students entering the IDEA Academy at the beginning of the fourth grade who will read on grade level by the end of fifth grade.	85%	90%	95%-100%	<ul style="list-style-type: none"> <li>• Stanford 9</li> <li>• OLSAT</li> <li>• Individual Reading Inventories</li> <li>• TAAS Reading</li> </ul>
6. Percentage of fifth, sixth, and seventh grade students who will read on or above grade level at the end of their second year in the IDEA Academy	85%	90%	95%-100%	<ul style="list-style-type: none"> <li>• Stanford 9</li> <li>• OSLAT</li> <li>• Individual Reading Inventories</li> <li>• TAAS Reading</li> </ul>
7. Percentage of Students passing Reading classes with a 75% or higher.	85%	90%	95%	<ul style="list-style-type: none"> <li>• Student Report Cards</li> </ul>

*\*All measurement tools are explained in greater detail under the assessment section of the charter beginning on page 30.*

**2. Math: Students will perform on or above grade level on problem solving and computation, and students will pass the High School Algebra I end of year exam by the end of their eighth grade year.**

Performance Objective	2000-01	2001-02	2002-05	Measurement tool
1. Percentage of students at all grade levels who will pass the math section of the Texas Assessment of Academic Skills	85%	90%	95%-100%	• TAAS Math
2. Percentage of students at all grade levels who will increase their math TAAS TLI by 15 percentage points or score a minimum 83 on the TLI	85%	90%	95%-100%	• TAAS Math
3. Percentage of students who will score on or above grade level on norm-referenced tests scored in terms of grade level	85%	90%	95%-100%	• Stanford 9 • OLSAT
4. Percentage of eighth grade students who will take Algebra I for high school credit and pass the End of Course Exam	N/A	50%	100%	• Report Cards • End of Course Exam
5. Percentage of Students in all grade levels passing their math courses with 80% or higher	85%	90%	95%-100%	• Student Report Cards
6. Percentage of students who will pass IDEA Academy-generated End of Course Exam	85%	90%	95%-100%	• Student Report Cards

**3. Writing: Students will be able to effectively communicate to diverse audiences through a variety of genres and for an array of purposes.**

Performance Objective	2000-01	2001-02	2002-05	Measurement tool*
1. Percentage of students in grades four and eight who will pass the composition section of TAAS with a score of "3" or higher	90%	95%	95%-100%	• TAAS Writing
2. Percentage of students in grades four and eight who will pass the objective section of TAAS writing	90%	95%	95%-100%	• TAAS Writing
3. Percentage of students in all grade levels whose writing samples will be on or above national grade level averages	85%	90%	95%	• OLSAT • Committee evaluation using

				nationally recognized rubric
4. Percentage of students whose use of mechanics will be on or above national grade level averages	85%	90%	95%	<ul style="list-style-type: none"> <li>OSLAT</li> <li>Committee evaluation using nationally recognized rubric</li> </ul>
5. Percentage of students in all grades who will pass writing with an 80% or higher	80%	85%	90%	<ul style="list-style-type: none"> <li>Student Report Cards</li> </ul>
6. Percentage of students whose writing portfolios will demonstrate mastery of writing in terms of specific grade levels	80%	85%	90%	<ul style="list-style-type: none"> <li>Committee Evaluation of Writing Portfolios</li> </ul>

**4. Science and Social Studies: Students will graduate from the IDEA Academy fully prepared for the rigors of high school Advanced Placement Courses and with a mastery of the curricular objectives outlined in the TEKS and *Core Knowledge Sequence*.**

Performance Objective	2000-01	2001-02	2002-05	Measurement tool*
1. Percentage of students in all grades passing the End of Course Exams in social studies and science	75%	80%	85%	<ul style="list-style-type: none"> <li>IDEA Academy End of Course Exams</li> </ul>
2. Percentage of students in all grades scoring on or above national grade level averages	75%	80%	85%	<ul style="list-style-type: none"> <li>Stanford 9</li> </ul>
3. Percentage of all students whose long term science project and research papers receive a score of 80% or higher	80%	85%	90%	<ul style="list-style-type: none"> <li>Scoring Rubric for Science projects/research papers</li> </ul>
4. Percentage of eighth grade students whose social studies research project will receive a score of 80% or higher	N/A	85%	90%	<ul style="list-style-type: none"> <li>Scoring Rubric of IDEA Academy Evaluation Committee</li> </ul>
5. Percentage of students who will pass science with an 80% or higher	85%	90%	95%	<ul style="list-style-type: none"> <li>Student Report Cards</li> </ul>

## APPLICATION

6. Percentage of students who will pass social studies with an 80% or higher	85%	90%	95%	• Student Report Cards
--	-----	-----	-----	------------------------

## Timelines for Reporting Progress

LAAS	Standard 9	OLSA	Portfolio Evaluation Rubrics	End-of-Course Exams	Individual Reading Inventories	Spring Semester Science/Social Studies Projects
June	December	November	June	June	May	May

## B. School Goals

## 1. School Climate: Students will be invested in the educational goals of the IDEA Academy and inspired to learn.

Performance Objective	2000-01	2001-02	2002-05	Measurement tool
Students reporting positive attitude toward the Academy	90%	95%	95%	• Student Surveys
• Timeline for reporting progress: January and June				
Students renewing their contracts to continue at the Academy	90%	95%	95%	• Student enrollment Records
• Timeline for reporting progress: June				
Average Daily Attendance	96%	97%	97%	• ADA Records
• Timeline for reporting progress: Monthly				
Formal student recognition opportunities per year	4	4	4	• Ceremony Programs
• Timeline for reporting progress: June				

## 2. School Climate: Teachers will be invested in the educational goals of the IDEA Academy and believe that the IDEA Academy is a good place to work.

Performance Objective	2000-01	2001-02	2002-05	Measurement tool
1. Teachers reporting positive attitude toward the Academy	90%	95%	95%	• Staff Surveys
• Timeline for reporting progress: January and June				
2. Teachers renewing their contracts to continue at the Academy	90%	95%	95%	• Teacher Personnel



				Reports
• <i>Timeline for reporting progress: June</i>				
3. Average Daily Attendance	95%	95%	95%	• Teacher Payroll Records
• <i>Timeline for reporting progress: June</i>				
4. Formal staff recognition opportunities per year	2	2	2	• Written account
• <i>Timeline for reporting progress: June</i>				

**3. Parental Involvement: Parents will be invested in their child's education and believe that they and the IDEA Academy share common goals and a unified sense of purpose.**

Performance Objective	2000-01	2001-02	2002-05	Measurement tool
Percentage of parents receiving at least one home visit per year	100%	100%	100%	• Signed Contracts • Parental Contact Logs
• <i>Timeline for reporting progress: June</i>				
Percentage of parents attending school functions four times per year	80%	80%	80%	• Parental Contact Logs
• <i>Timeline for reporting progress: June</i>				
Percentage of parents reporting positive attitude towards the Academy	95%	95%	95%	• Parent Surveys
• <i>Timeline for reporting progress: January and June</i>				
Percentage of parents participating on Parent Advisory Committee	60%	65%	70%	• PAC meeting attendance logs
• <i>Timeline for reporting progress: June</i>				

**4. Teacher Goal: Teachers will ensure that students receive an excellent, high quality education based on high expectations for student success.**

Performance Objective	Measurement Tool
1. Every teacher will continue to maintain a 95% attendance rate, including Saturday classes	• Payroll records
• <i>Timeline for reporting progress: June</i>	
2. Every teacher will submit detailed lesson plans/course syllabi and a completed draft for the midterm and semester exam one week prior to the beginning of classes during the first semester and prior to winter break for the second semester	• All lesson plans, syllabi and final exams will be kept on file; there will be a log detailing the receipt of these items

## APPLICATION

<ul style="list-style-type: none"> <li>Timeline for reporting progress: January and June</li> </ul>	
3. Every teacher will continue to receive a satisfactory or better on student and parent evaluations	<ul style="list-style-type: none"> <li>Student and parent evaluations</li> </ul>
<ul style="list-style-type: none"> <li>Timeline for reporting progress: June</li> </ul>	
4. Every teacher will complete thirty hours or more of professional development over the course of the year	<ul style="list-style-type: none"> <li>Professional sign-in logs</li> <li>Proof of conferences or classes attended</li> <li>Teacher Self-Report of professional development activities</li> </ul>
<ul style="list-style-type: none"> <li>Timeline for reporting progress: June</li> </ul>	
5. Every teacher will conduct thirty hours of classroom observations either at the IDEA Academy or in the classrooms of other master teachers	<ul style="list-style-type: none"> <li>Classroom Observation Logs</li> </ul>
<ul style="list-style-type: none"> <li>Timeline for reporting progress: June</li> </ul>	
6. Every teacher will be observed by a peer at least once each month. Peer observations will be followed by a reflection/debriefing.	<ul style="list-style-type: none"> <li>Classroom observation logs and copy of reflection template</li> </ul>

**5. Community Involvement and Public Relations Goal: The IDEA Academy will be viewed by the greater Rio Grande community as a model of educational excellence.**

Performance Objective	2000-01	2001-02	2002-05
1. Positive media articles/news stories per year	6	8	10
2. Newsletters issued per year	100	150	200
3. Newsletter issued X times per year	4	4	4
4. Letters of Support from community/business leaders	6	8	10

**6. Financial Stability: The IDEA Academy will be financially able to implement all curricular, extra-curricular, and developmental initiatives.**

Performance Objective	2000-01	2001-02	2002-05
1. Funds raised from private and corporate sources	\$80,000	\$100,000	\$120,000
2. Funds raised from public and private grants	\$50,000	\$65,000	80,000
3. Funds raised from fundraising activities sponsored by the parent advisory committee, e.g. bake sales, raffles	\$4,000	\$6,000	\$8,000

## Facilities Development

The IDEA Academy has been moved each year of its existence and the school district did not provide 1998-99 IDEA Academy students with transportation to its current location. Therefore, one of our primary goals is to find a facility and location that will provide the necessary stability for continuity and growth. We have currently selected a site in downtown Donna for the 2000-01 school year. We view this as a short-term facilities solution; however, it will ensure that we are prepared for students by Fall of 2000 and will meet our growth and expansion needs for at least the first two years. Our ultimate goals for facilities development follow:

### 7. The IDEA Academy will develop a permanent school site and educational building

Performance Objective
1. Land for the IDEA Academy will be selected and approved by the school board by December 2000.
2. Architectural plans for new school or existing building and renovations will be approved by the board of directors by December 2000.
3. Fundraising goals and capital funds campaign will be developed by January of 2001
4. Groundbreaking and/or renovations for permanent school site will begin by December 2002

### 8. Growth

During our first year we will enroll fifty students in grades four through seven, for a total of 200 students. During our second year we will expand to the eighth grade. During our third year, we will begin increasing the number of students enrolled in each grade level. Our expansion plans are detailed in table 3, and in the community outreach and marketing plan we explicitly state what steps will be taken (i.e. performance objectives) to ensure that we meet these recruitment goals.

Table 3

School Year	The IDEA Academy School Grades	Total Enrollment
2000-2001	Fourth Grade through Seventh Grade	200
2001-2002	Fourth Grade through Eighth Grade	250
2002-2003	Fourth Grade through Eighth Grade	375
2003-2004	Fourth Grade through Eighth Grade	500
2004-2005	Fourth Grade through Eighth Grade	500

## C. Community Outreach and Marketing Plan

Our community outreach and marketing plan includes both long- and short-term practices. Our long run efforts focus on raising awareness of the IDEA Academy and its mission through positive newspaper and television stories and community outreach programs. In the past, the media stories have centered around community service projects, special events, and the uniqueness of the IDEA Academy. We also issue quarterly newsletters to students' families, community leaders, funders, and local businesses.

The groundwork of positive exposure and the establishment of community and media relationships set the stage for our seasonal community outreach, which focuses on recruiting students to attend the IDEA Academy. It is of primary importance that we reach students most in need of our services, including those students living in *colonias*, who are partially removed from the traditional media routes. Therefore, we will continue to canvass neighborhoods, going door-to-door, to inform parents and students of the IDEA Academy. Thanks to an organized and committed coalition of teachers, parents and community members, we have a willing and able canvassing network in place.

When students and their parents express an interest in attending the IDEA Academy, the teachers visit them at their homes, further explain the program, and answer questions. If students and their parents decide that the IDEA Academy is a program that fits their educational ideals and philosophy, they then sign the *IDEA Academy Commitment to Excellence and Achievement*, known to students and families as "The Contract." It is this nearly unprecedented personal contact that makes the IDEA Academy unique.

We will continue providing Spanish and English versions of all printed material. In addition, the following practices will ensure a sufficient applicant pool:

- Teacher referrals from other campuses;
- Announcements in both community-based and major newspapers;
- Word of mouth: Our 170 students, both former and present, provide a network of parents and students able to inform others of the IDEA Academy;
- Information booths: In partnership with local businesses and community organizations we will staff information booths with parent volunteers, current students, and teachers. This will provide prospective students and their parents an opportunity to learn about the IDEA Academy and give them the chance to ask questions of those most familiar with the program;
- Continued mailing of our IDEA Academy newsletter to members of the community.
- Posting of flyers in local supermarkets, churches, community centers, *colonias*, and apartment complexes;
- Visiting the homes of interested parents and students; and
- Conducting informational meetings for parents and students.

Our recruitment methods will focus on the geographical area of Donna, though students from across the Rio Grande Valley will be eligible to attend. We will provide transportation to students throughout Donna, with the possibility of expanding the service to other surrounding communities according to demand.

## XI. General Description of School and Statement of Need

### General Description

The IDEA Academy will serve students between fourth and eighth grade. The basic framework of the school is simple: Students attend school longer, work harder, and receive more hours of high quality instruction. This intensive pace, combined with strategies to motivate and invest students in their education, allows them to progress academically at an advanced rate. We combine these high academic standards with strict guidelines for personal conduct and individual responsibility. We show that with the right kind of discipline and old-fashioned hard work, minority students from under-resourced neighborhoods can and do achieve at very high levels.

Following is a synopsis of the average day in the life of an IDEA Academy student:

- |                                |   |
|--------------------------------|---|
| <b>7:00 a.m. to 7:30 a.m.:</b> | Students arrive at school and eat breakfast.  |
| <b>7:30 a.m. to 8:00 a.m.:</b> | Students attend homeroom classes and begin morning thinking skills sheet. The skills sheet contains complex math problems, patterns, mathematical operations, the daily quotation, a short morning message scattered with intentional grammatical errors, and logic puzzles.  |
| <b>8:00 a.m. to 8:45 a.m.:</b> | Students attend reading class according to their current reading level. This is the only time during the day when students are homogeneously grouped, and it allows teachers to implement a more individualized reading curriculum that better meets students' needs.<br><i>(For example, 20% of our fourth and fifth grade students entering the IDEA Academy this year read at or below first grade level. In order to meet their needs without diluting the reading curriculum for students on or above level, it was imperative that we offered homogeneously grouped reading classes).</i> |
| <b>8:45 a.m. to 3:30 p.m.:</b> | Core academic classes. Students attend math, reading, writing and language arts, science, health, social studies, physical education, art/music, current events, and study skills classes. All classes are heterogeneously grouped.   |
| <b>3:30 p.m. to 4:10 p.m.:</b> | Enrichment period. As students receive their afternoon snack they attend their choice of organized, structured enrichment opportunities.  |
| <b>4:10 p.m. to 5:00 p.m.:</b> | Reader's Workshop   |
| <b>After 5:00 p.m.:</b>        | Further tutoring and one-on-one instruction for students who need extra help in reading and math.   |

## Need for the IDEA Academy

*In outlining the deficiencies of the school districts currently serving our prospective students, our intention is not to unfairly or harshly criticize their efforts. Rather, we hope to bring to light some of the problems that we can help solve. We do not believe that charter schools alone are going to solve the myriad challenges facing public education, but we do believe that they are an important piece in the mosaic of solutions.*

Too many students in Donna and the surrounding communities fall more than one grade level behind in basic academic skills. Analysis of school data indicates that the decline in student performance begins in grade four and continues through middle school, with increases in student behavioral infractions, absences, and failing grades. With over 96% of students qualifying for the federal free lunch program, parents cannot afford private alternatives to their regularly zoned schools.

In assessing its needs in an application for federal assistance, Donna ISD, the school district from which we currently draw our students, writes:

The region is plagued by very high levels of poverty, high unemployment and under employment, and low educational attainment...

The school is influenced by a community ravaged by gangs, crime, and drugs. Recently a 12-year-old Donna student's throat was slit and his blood drunk by his killer, who afterwards mutilated his body. Furthermore, extensive graffiti, frequent drive-by shootings, and other signs of gang activity throughout the community bring grief and concern to its residents.

Donna's economically depressed area and economically disadvantaged population is further complicated by a school district tax structure which results in the district being ranked among the poorest in the state of Texas...The effect is a low budget for education at school and home.

The economic depression, high crime, and poor tax base contribute to an attitude by parents that emphasizes short-term goals and survival. Consequently, clear goals for educational success are often ignored by parents, and the children are not pushed to excel.

Even though the state of Texas rated the district as "Academically Acceptable," our students do not do well in key performance factors. The district exempts 17.1% of its students from taking the TAAS while the State exempts only 2.4%. In spite of this the district's passing rate for students who do test is 56.4% for the 1998 school year as compared to the state's rate of 72.9%.

Source: *Application for Federal Education Assistance, Spring of 1999*

According to these statistics, only 47% of students in the district pass TAAS.

This statement of need cites district averages, but there are schools within the district with even more serious deficiencies. For example, at one elementary school, over 50% of the students were exempted from TAAS in 1999. Conditions at the High School are not much better. Although Donna reports its dropout rate as 1.4%, there is currently a statewide movement to alter the manner in which the drop-out rate is formulated. One of the more accurate methods proposed is to examine how many freshmen enroll at the high school and how many of them actually graduate. The statistics for Donna are frightening: **There are 924 freshman, and only 387 seniors.** With population trends steady, that means that only one-third of freshmen make it to their senior year. Even fewer graduate. While the causes for this statistic are varied, the current approach by school districts seems to be an abject failure.

Traditionally, districts have sought to cure the problem with an increase in remedial programs. However, a clear need exists to increase the aspirations of students through an accelerated school curriculum with higher goals for student achievement. The message

needs to be sent that no longer will teachers and parents sit idly by as students fail to meet minimum academic standards.

Nowhere in the Rio Grande Valley is there a charter school that serves grades four through eight, nor is there one which focuses on providing an academically rigorous education based on high expectations for student achievement. The charter schools that do exist are recovery programs aimed at high school students who have dropped out or are in imminent danger of dropping out.

So the questions naturally arise: Given the need for a change in the *status quo*, is there sufficient demand for the IDEA Academy? Will students really want to attend school for an additional 2 1/2 hours each day? Do students want to attend school on Saturday? The answer to these questions is an emphatic yes, as evidenced by the 103 fourth and fifth grade students we currently serve.

Since our program is open only to those students who attend Garza Elementary, these 103 students represent an impressive share of the student population. Over sixty-percent of all students in fifth grade, and forty percent of fourth grade students, chose to matriculate in the IDEA Academy, a purely optional program. Demand from parents and students was so great that we recruited additional staff. Simply by keeping the students we already serve (in a recent survey 93% of students said that they intend to attend the IDEA Academy in 2000-01), we will reach 50 percent of our first year recruitment goal. By recovering those students who began school at the IDEA Academy but were prohibited from attending this year, we will reach 85% of our first year recruitment goal.

The large number of parents who petitioned us to apply for a state charter lends more evidence to community demand. These parents, who implored us to expand the program so that their children could progress through middle school as IDEA Academy students, were the impetus for this charter application.

Given, then, that there is both a need and a demand for the IDEA Academy, we posit that the charter school model is the best, most effective structure with which to meet our students' educational needs. This can be seen not only in our past success, but in the success of other charter schools serving similar student populations.

While we believe that the IDEA Academy is unique in its approach to student learning, our basic structure and framework are drawn from two highly successful charter schools: The KIPP Academy and YES College Preparatory, Houston charter schools rated exemplary by TEA. We created the IDEA Academy two years ago after visiting KIPP, observing the classrooms, and speaking with students and teachers.

We are further convinced that a charter school is the best way to meet our students' needs because during the last two school years we have functioned as an "unofficial" charter school. Last year, after only one year in existence, our approach to education reaped impressive results as demonstrated in the following table:

### 1999 IDEA Academy TAAS Results

#### 4<sup>th</sup> Grade

#### 5<sup>th</sup> Grade

	TAAS passing rate before entering IDEA	TAAS passing rate after one year in IDEA	TAAS passing rate before entering IDEA	TAAS passing rate after one year in IDEA
MATH	75%	90%	63%	97%
READING	75%	95%	62%	78%

Unfortunately, because we are currently so similar to a charter school, tension exists between our mission, vision, and goals and the constraints that are continuously placed upon us as we struggle to operate within the framework of the school district. To continue expanding and improving our program, the teachers and administrators of the IDEA Academy need greater autonomy with regard to curriculum, planning, assessment, classroom management, and pedagogy. Furthermore, we operate with a constant uneasiness that our program could be ended on a whim or that we will face additional restrictions or barriers to the grade levels we serve. Currently, we are only permitted to serve fourth and fifth grade students, and our efforts to expand to sixth, seventh, and eighth grade have been rejected by the school district. It is in these crucial grades that children must be inspired to learn and be turned on by the power of education. This is why we must achieve state charter status.

Only as a state charter school can we achieve our best results. Our success results from what we demand from our students and teachers, and from the culture created when all students are held to high standards, attend school longer and on Saturday, complete additional homework, and commit to community service. These are requirements that traditional public schools are simply unable to make. As a charter school we can effectively provide parents and students the most rigorous, high quality, innovative, and effective model for education.

## **XII. Educational Plan**

### **The Core Knowledge Approach**

*The error...is the assumption that it is the diversity in children's social and cultural backgrounds that poses the greatest problem for teaching. In fact, a far greater problem is variability in children's educational background, and their levels of preparation for learning an academic curriculum.*

-Harold Stevenson and James Stigler  
*The Learning Gap*

It is sometimes stated that it matters not *what* students learn, but rather that they learn how to learn. The latter approach is characterized by proclamations that students need only a vague set of skills to succeed. The vagueness of this approach is no virtue as it places unreasonable demands on teachers and contributes to a curriculum full of gaps and repetitions with little cohesion and continuity. E. D. Hirsch's Core Knowledge Series provides students a base of classical knowledge that is often referenced in American discourse and is commonly known by educated Americans. Combined with the TEKS, the *Core Knowledge Series* curriculum will ensure students will graduate from the IDEA Academy with no gaps in their knowledge. Because specific authors, books, and content are clearly identified for each grade level, there will be no time wasted repeating the curriculum, and there will be maximum time building upon and reinforcing shared learning experiences. Instruction is strengthened because each teacher is aware of what each child was taught in previous grade levels and will be taught in future grades. The scope and sequence of the *Core Knowledge Series* provides an intrinsic vertical teaming model:



*"The Sequence represents a first and ongoing attempt to state specifically a core of shared knowledge that children should learn in American schools. It should be emphasized that the Core Knowledge Sequence is not a list of facts to be memorized. Rather, it is a guide to coherent content from grade to grade, designed to encourage steady academic progress as children build their knowledge and skills from one year to the next (Core Knowledge Sequence)."*

The educational program implemented at the IDEA Academy prevents a sporadic learning experience containing gaps and repetitions. Rather, our use of the *Core Knowledge Sequence* guarantees the Texas Essential Knowledge and Skills (TEKS) are taught and provides a coherent and clear sequence of learning and instruction. The IDEA Academy curriculum contains a scope and sequence for each grade level using both the Core Knowledge Sequence and the TEKS. The IDEA Academy curriculum emphasizes both content and skill in each of the core subjects. In order for students to extract the most amount of learning for school, skills and content are linked in a meaningful way that builds on students' shared core knowledge.

To this end, the IDEA Academy will stress vertical (among different grade levels) and horizontal (between classrooms at each grade level) continuity so that student knowledge will grow consistently and progressively from grade to grade. As Hirsch writes:

*"Core Knowledge schools are dedicated to teaching solid academic content and skills to all children. To implement Core Knowledge, many people involved with the school's operations, including both staff and parents, need to engage in a great deal of thoughtful discussion and cooperative planning. Teachers make a commitment to teach all the topics in the Core Knowledge Sequence at the assigned grade levels. This commitment ensures consistency, and it helps avoid serious gaps in knowledge, as well as needless repetitions in instruction, as students progress through the grades (Core Knowledge Sequence)."*

In order that the teachers teach the children, and not just the subject matter, our pedagogical approach is deliberate, proven, and varied. Because of our lengthened school day we are able to fully immerse our students in exciting, invigorating project-based learning while effectively incorporating more traditional instructional methods.

Our teachers do what good teachers across the world and through the ages have always done: They present lessons incorporating a variety of teaching styles and learning modalities, and balance teacher-directed and learner-centered instruction to reap the considerable benefits that each offer.

Specifically, the pedagogy will incorporate:

- Whole-class instruction;
- Indirect Whole-Class instruction;
- Reader's/Writer's Workshop: These workshops incorporate short mini-lessons, usually through teacher modeling, which are immediately followed with an opportunity for students to practice that skill. As students practice, teachers confer with individual students or small groups of students to reinforce and re-teach key concepts. Teachers carefully observe student proficiencies and weaknesses, and create future lessons accordingly. Students are empowered to choose what they read or write during the workshop;
- One-on-one teacher instruction;
- Cooperative learning;
- Project-based learning;

- Service learning in conjunction with *Do Something*, the national community service foundation;
- Instruction incorporating the various learning modalities;
- Peer tutoring;
- Discovery learning;
- Phonetic-based reading instruction;
- Whole-language based instruction;
- Multi-sensory instruction that includes as raps and chants; and
- educational field lessons.

In addition to the academic curricula, the IDEA Academy also places great emphasis on enrichment activities provided to all students from 3:00 p.m. to 5:00 p.m. Monday through Friday. During the Saturday School program students attend classes from 9:00 a.m. to 12:00 p.m. Students participate in a variety of activities such as karate, poetry, soccer, guitar, taekwondo, dance, art, and others. At the IDEA Academy, we believe in the importance of a well-rounded student.

*"The arts are not a peripheral part of the curriculum, but an essential part of the knowledge children should learn in the early grades...Instruction in the arts should be non-competitive, and provide many opportunities to sing, dance, listen to music, play act, read and write poetry, draw, paint and make objects. Equally important, when children are young and receptive, they should be exposed to fine paintings, great music and other inspiring examples of art. As children progress in their knowledge and competencies, they can begin to learn more about the methods and terminology of the different arts, and become familiar with an ever wider range of great artists and acknowledged masterworks (Core Knowledge Sequence.)"*

## Professional Development Opportunities:

Our professional development opportunities incorporate both "in-house" training that we conduct using IDEA Academy facilitators, and workshops and courses that our teachers have the opportunity to take during summer recess or after-school hours. Many of the staff development opportunities are designed to train IDEA Academy staff on the specific educational approaches that IDEA Academy teachers have refined and implemented during the past two years. In order to maximize limited staff development time, every workshop or conference our teachers attend will better prepare them to implement the full mission of our school. In addition to state-mandated training, our teachers will receive professional development in:

- The pre-referral team approach to special education as developed by Garcia and Ortiz;
- Service learning and character education curriculum training provided by *Do Something* trainers;
- Portfolio/Authentic Assessment;
- Implementing Readers/Writers Workshops;
- Providing services to ESL, bilingual, and special education students within the framework of heterogeneously grouped classrooms;
- Columbia University's Teachers College Writing Project, an intensive course to teach educators how to implement a writer's workshop;

- The IDEA Academy approach to classroom/behavioral management and parent involvement;
- Effective strategies for ESL/LEP students; and
- Modifying teaching strategies for special education students without compromising curricular rigor.

## Admissions Process

Matriculation into the IDEA Academy is a collaborative decision between students, parents, and staff. All students, regardless of their academic or behavioral history, will be offered admission to the IDEA Academy. To apply, students must write an essay explaining why they wish to join the program. In the event that a student is unable to write the essay (students unable to read or write often matriculate in the IDEA Academy) the student can dictate the essay to a third party. We have waived in the past, and will continue to waive in the future, the written essay requirement for students who simply are unable to write or dictate an essay because of academic deficiencies or compelling individual circumstances. The essay is not used as a tool to select only the most talented writers. Rather it ensures that the student truly is committed to the IDEA Academy and has an inner sense of what it will mean to stay in school longer and work harder.

Students and a parent/guardian must sign the *IDEA Academy Commitment to Excellence and Achievement*, a contract that outlines the responsibilities of teachers, parents, and students. Generally, though not always, the contract is signed during the initial teacher visit to a child's home.

As an open-enrollment charter, we will accept students on a first come, first served basis. We will begin accepting applications for the IDEA Academy no earlier than March 10, 2000 and continue enrolling students until we reach capacity. In the event that, during the course of registration, more students matriculate in the program than we are prepared to serve, a lottery will be held. Each student will be assigned a number. The roster of student names, with the corresponding randomly assigned student numbers, will be signed by three witnesses. Numbers will then be drawn blindly, and the corresponding names will be compiled and examined by the witnesses. Those students not selected will be placed on the waiting list in the sequence the numbers are drawn.

Our admissions policy is consistent with our mission of fostering an environment based on democratic principles. In casting the widest net possible and offering all students the same chance to attend regardless of their current ability levels, we are ensuring equality of opportunity. Our written essay requirement balances our fundamental belief that extra opportunities must be met with responsibility.

## Special Needs Students and Programs

### Special Education

Child Find: The IDEA Academy staff will work with community based child find organizations and the regional service center to ensure that we fulfill our legal and ethical imperative to identify young children with disabilities and put them in touch with the medical/educational programs they need. Because of our unprecedented familiarity and contact with the neighborhoods in which our students live (as outlined in our community outreach plan, we

canvass neighborhoods during recruitment and visit homes when children are deciding whether or not to matriculate), we are in a unique position to identify children in need. When we visit homes and canvass neighborhoods we will distribute information on children's health services and talk with children and parents to further identify children in need.

Confidentiality: All special education students have a right to confidentiality as a procedural safeguard. In order to ensure confidentiality, names of authorized school personnel permitted to view special education records will be established. All personnel who view a student's record will sign a sheet placed at the beginning of the folder. Written special education records will be kept in a locked filing cabinet in a locked office. No names of special education students will be made public; specifically, no names will be given to the media.

Procedural Safeguards: It is of vital importance that parents of special education students understand their rights (i.e. right to five-day notice of ARD meetings, right to participate in all elements of IEP development, right to due process, etc.) Therefore, all safeguards will be outlined in a readable, "user-friendly" pamphlet as free of educational jargon as possible. The pamphlet will be available in the parents' dominant language and will be distributed at every review or annual ARD meeting. As an added procedural safeguard, there will be two regularly scheduled special education forums each semester. At the first meeting a speaker will discuss procedural safeguards and answer parent questions. Meetings will be responsive to the cultural and linguistic needs of parents, therefore, an interpreter will be present. Updates to procedural safeguards will be explained during subsequent meetings. These meetings will occur in conjunction with MHMRC, TRC, and other local community-based organizations. A video explaining procedural safeguards (in English, Spanish, closed caption and American Sign Language) will be available either for parents to check out to review at their leisure or to view on the school premises.

Notice of ARD committee meetings: Parents of students with disabilities will be given a five working day notice of ARD meetings. Notices will be given in the parent's dominant mode of communication, unless a request is made for forms to be provided in another language. Notices will be provided in writing and in person or over the phone. If parents do not attend the first scheduled meeting, a second five working day notice will be provided. In addition, a school liaison will visit the child's home to determine what the school must do to ensure the parent attends the ARD. Some practices will include:

- Providing transportation for parents;
- Scheduling meetings after working hours;
- Conducting ARD meetings at the child's home, so that young children need not be left without supervision.

Assessment of Children to determine eligibility: Because many students referred to special education are dominant in a language other than English, too often students are inappropriately placed in special education when the true cause of their academic challenges rests with their lack of English proficiency. Conversely, students are often improperly denied special education service because the difficulties, it is assumed, result from a child's lack of English proficiency. To properly assess student's special education eligibility, Shernaz Garcia and Alba Ortiz's pre-referral approach will be followed using Teacher Assistance Teams

(TAT). This approach attempts to first assist students before referring them to special education.

A TAT is comprised of regular education classroom teachers who identify the challenges the student is facing and create an action plan to solve these problems. The team conducts follow-up meetings to evaluate the effectiveness of the action plan, and, if necessary, to develop additional instructional recommendations. Garcia and Ortiz, highly respected professors at University of Texas at Austin, summarize the benefits of this pre-referral model:

Teachers are provided a day-to-day peer problem-solving unit within their school building and thus do not have to experience long delays until external support can be provided. Moreover, a collaborative learning community is established since the team process actually provides continuous staff development focused on management of instruction and students for all persons involved. Finally, the use of TAT serves to reduce the number of inappropriate referrals to special education because most problems can be taken care of by regular education personnel.

This approach empowers regular education teachers to develop and implement a strategic plan to help a child in a cooperative effort. However, if the pre-referral work is completed, and all attempts to help the child have proven unsuccessful, the TAT brings its detailed observations and documented strategies to a certified bilingual diagnostician trained in assessing the difference between students who are acquiring English as a second language and those who have learning disabilities. In accordance with due process (parents will be notified prior to testing, for example), the diagnostician, with the aid of parents and teachers will discern whether or not a child qualifies for special education services.

A compelling advantage of the IDEA Academy's approach is that a collaborative group of teachers tries everything to help a child to succeed in the mainstream environment. The focus is not on labeling, but on helping. If a child is ultimately referred to special education, the TATs come armed with an arsenal of strategies and approaches they implemented in an effort to teach him or her, and the outcomes of these efforts.

Development and Implementation of IEP: All IEPs will be developed using a multidisciplinary team approach. The IEP team will include an administrator, a certified special education teacher, the regular education teacher(s) who work with the child daily, and parents. (Other members are also sometimes required. For example, LPAC representative, nurse, speech therapist, and occupational/physical therapist). Each individualized program will include the following components:

- student's current level of performance;
- annual goals;
- short-term objectives;
- the schedule of services the child will receive;
- Least Restrictive Environment Consideration; and
- access to the general curriculum

The focus of the IEP will be to provide the child what he or she needs to be successful, not to plug the child into our existing programs, nor to determine whether or not the school will be able to easily provide or find the services. Furthermore, assistive technology will be implemented to optimize the child's access to the regular education curriculum.

Least Restrictive Environment: Consistent with the mission of the IDEA Academy is meeting the needs of special education students in a manner that prepares them for high school and college. To accomplish this, we will offer an array of services to students with special needs that aims to minimize the amount of time special education students are removed from the regular education classrooms. Whenever possible, we believe that mainstreaming students in regular education classes is ideal, and our certified special education director will work with classroom teachers to ensure that IEPs are followed and students receive all the modifications necessary. Furthermore, the special education director will form a truly collaborative partnership with regular education teachers as she aids teachers in implementing the IEP. It is such collaboration that is so vital, but sadly so elusive in public schools today.

Assistive technology will aid in placing students in the least restrictive environment possible. For example, print to voice scanners will be available in classrooms so that students with reading disabilities will still have access to the important content that is vital to courses such as science and social studies. Special Education students will also benefit from the IDEA Academy's organizational and study skills workshops, which are required for all students. These will help special education students create and implement an organizational framework, a necessary but often lacking prerequisite to success in school. However, it is a mistake to insist that all special education students be forced to follow a rigid program that may not meet their needs. Pull-out programs will be kept to a minimum. When possible, all special education programs available to students that take place outside the mainstream school curriculum will be offered before or after the traditional school day. Other services for students include, but are not limited to:

- Expressways to Reading
- Reader's Workshop (within the mainstream special education environment)
- Resource Instruction in math and reading

Transition Planning: Transition planning for students ages fourteen and older is required by federal law, and it ensures that students begin to receive the skills and knowledge necessary for independence. The IDEA Academy far exceeds federal requirements, as we begin transition planning with students in fourth grade. At the end of each school year, the teachers and parents of special education children develop a clear plan to help the student transition from one grade level to the next in a way that optimizes chances for immediate success the following year. The aim is to create an effective transition plan that is such a benefit to students, that they are able to exit the special education program and be successful in a completely mainstream learning environment.

Special education students who remain in special education as they leave the IDEA Academy at the end of their eighth grade year, receive a refined transition plan that begins to prepare them for post-secondary school options. Because IDEA Academy students are continuously engaged in community service projects, the transition plan will describe in detail what his/her "real world" experiences are and what meaningful contacts he/she has made within the community.

Qualifications of Special Education Personnel: All personnel responsible for ensuring that special needs students receive necessary services will be certified special education professionals.

**Services to Expelled Students:** While we believe that a virtue of the IDEA Academy is that our students are so invested in their education that they are much less likely to act in a manner that would cause their expulsion, it is also clear that students sometimes make unfortunate choices. In the event that a student is expelled from the IDEA Academy, he or she will receive services through the local alternative education center. When special education students are placed in alternative education centers, the IDEA Academy Director of Special Education will ensure that Individual Educational Plans are followed. Furthermore, manifestation determination will also be considered; i.e. if a student's actions were a result of his or her disability, then expulsion may be inappropriate.

***The sections that follow can be grouped under the umbrella category of Special Needs Programs. Many of the programs are similar and the services provided are related (for example, students who qualify for dyslexia services may also qualify under section 504). The IDEA Academy school director and dean of instruction will ensure that all special needs students receive their required services, and that funding is properly allocated. The school director will ensure that all state and federal requirements are met. We have highlighted the basic framework for our approaches below.***

## **Working with students from other federal programs**

**Title Programs:** The US Department of Education lists a litany of programs to meet the needs of Title I students. Among them are after-school programs, Saturday programs, and summer programs, all of which the IDEA Academy currently provides or will provide. Furthermore, the U.S. Department of Education states that these programs are most effective when 1) regular teachers staff the extended-time programs, ensuring the programs coordination and continuity with normal classroom activities, and 2) programs use textbooks and materials from the students' regular classes for extended-time tutoring and homework help sessions. The Department of Education lists other components such as thematic instruction, implementing a challenging curriculum, and individual and small group instruction. Again, we utilize each of these strategies to reach all IDEA Academy students.

*The IDEA Academy will meet state and federal requirements to provide necessary services and/or accommodations to students in other federal title programs. Specific programs continue to be referenced throughout this application.*

**Migrant Education:** Because the Rio Grande Valley has a large migrant population, the IDEA Academy was created with migrant students in the forefront of our consciousness. In fact, the campus on which the IDEA Academy is housed currently views the IDEA Academy as a model program for working with migrant students. The following factors ensure that our educational program meets the needs of migrant students:

- We provide an enrichment rather than deficit model of instruction that enhances learning through an advanced curriculum (as outlined throughout this charter school application);
- The extended day, extended week format is ideal for migrant students, for it means that even if students miss as many as 51 days of instruction, they will still log the same total of hours as they would had they attended a traditional school every day of the school year;
- Our approach to instruction taps into students' language and cultural experiences and includes their migrant experiences as a vital part of our campus identity. Last year, for

example, students created a mural, a process through which they identified, researched, and graphically represented their "roots" and identity. In addition, our community outreach plan recruits role models who were once migrant students to work with students both on a regular basis and during special events with the overall effect of increasing their aspirations to attend college;

- The IDEA Academy staff has been and will continue to be composed of certified bilingual staff who understand the complexities, challenges, and most importantly the opportunities associated with educating migrant students;
- Parental Involvement: In addition to our previously outlined parental involvement strategies and community outreach plan, our high visibility in the *colonias* where many migrant students live, and commitment to home visits ensures that migrant parents and families view and trust IDEA Academy staff as committed to their children;
- IDEA Academy staff maintains and transfers each student's education and health records and establishes contact with the child's new school so that our tracking counselor can keep in regular contact with that child's teachers;
- An intense level of coordination among special education, bilingual education, and regular education teachers ensures that migrant students receive the services and support they need within the framework of the regular school day, thus eliminating pull-out programs; and
- Teaching staff will receive ongoing staff development to continuously refine and improve their approach to migrant education.

Section 504: The IDEA Academy consistently strives to serve the needs of all students. In Appendix A, we have attached an extensive seven-page flow chart that clearly explains how we identify students who qualify for services under Section 504, and how we then meet their needs. To state in general terms, though, we have a process that ensures that if a student's physical and/or psychological disability impairs his or her school work, we will take swift, appropriate, and responsible action to ensure that he or she receives the medical services or accommodations necessary.

### **Meeting the needs of students who qualify for other state programs.**

As we researched different programs and models to augment the IDEA Academy's educational offering for the 2000-01 school year, we discovered time and time again that the basic premise behind the IDEA Academy, a model that has been in effect for nearly two years, is a model that many schools are adopting to work with migrant, special education, bilingual, Title I, State Compensatory, and gifted and talented students here in Texas and around the country. Our school district so believed in our program's ability to reach these students that part of our funding came from State Compensatory, Title I, bilingual, and gifted and talented funds, a curious mix that cuts across the spectrum of educational programs. The staff of the IDEA Academy, therefore, will ensure that all students in such programs are identified, and that their academic progress and achievement levels are closely tracked using the evaluation tools outlined in section "J" of this application. In this way, we will be able to demonstrate that the basic philosophy behind the IDEA Academy is a benefit to all students.

Bilingual/ESL education: Located on the Texas-Mexico border, there are few places in America with more bilingual students than the Rio Grande Valley. Sixty percent of IDEA



Academy students are or were labeled bilingual or ESL/LEP. Our strategy at the IDEA Academy is simple: we provide all students with one period of Spanish language arts (this is modified according state and federal laws) each day because we believe that given the demographic trends of Texas and the United States, all students are better off being fluent in Spanish and English. At the same time, though, we must help students arriving at the IDEA Academy (as students in or above grade four) attain English fluency as quickly as possible to prepare them for high school and college. After one year in the IDEA Academy, students take the TAAS test in English, pass the test, and are exited from the bilingual/ESL program. All bilingual/ESL students receive language arts instruction from certified bilingual/ESL teachers, and these same teachers aid the regular education teachers in refining their pedagogy to meet the unique needs of language-minority students. Finally, as we have stated earlier in this application, many bilingual/ESL students also receive Title I and IV, special education, and migrant education services. Therefore, we will ensure that all these services are integrated and coordinated under the supervision of the LPAC committee.

Gifted and Talented: The IDEA Academy school director is a certified Gifted and Talented teacher and designed the GT model that the IDEA Academy has used since its inception in 1998. All GT students are served in a heterogeneous environment, where the classroom teacher provides extension and supplemental activities, with the aid and advice of a trained GT teacher. The most direct way in which we meet the needs of GT students is by implementing an accelerated curriculum that, among other things, prepares students for high school algebra in eighth grade and provides many enrichment opportunities during the school day. These enrichment activities, which are explained more fully in section I of this application, include art, drama, school newspaper, service learning, and web-page designing. In addition, we provide GT students the opportunity to manage the IDEA Academy peer-tutoring program. We have searched for a GT curriculum that matches the intensive education program that we provide and remain convinced that we currently offer the most enriching, demanding, rigorous one available in the Rio Grande Valley.

*Note: We have included State Compensatory and "At Risk" together because TEA writes: "State compensatory education as defined in section 42.152 (c) is a program designed to improve and enhance the regular education program for students in at-risk situations."*

State Compensatory/Students in At-Risk Situations: The overall structure of the IDEA Academy is intended to prepare students at risk of dropping out of school for success in high school and, ultimately, in college. Currently, 70% of our students are in at-risk situations. To prevent at risk students from dropping out, we 1) inspire students with the realization that their key to success in the future is hard work and good grades, 2) get students on grade level through an educational plan that challenges rather than remediates, and 3) access necessary outside resources.

Since we will serve students in grades 4-8, some of the work in identifying students who meet state criteria for being at-risk is already completed. Therefore, in addition to examining existing student records, the Student Assistance Committee will conduct ongoing analysis of incoming data to determine if students meet any of the following criteria:

For Fourth, Fifth and Sixth Grade the SAC will identify students who:

1. Did not perform satisfactorily on IRIs, Stanford 9, or OLSAT tests administered at the beginning of the school year;
2. Did not perform satisfactorily on an assessment instrument administered under subchapter B, Chapter 39;
3. Are students of Limited English Proficiency, as determined by LAS testing;
4. Are sexually, physically, or psychologically abused;
5. Engage in conduct described by section 51.03 (a), Family Code; and
6. Are not disabled and who reside in a residential placement facility in a district in which the student's parent or legal guardian does not reside, including a detention facility, substance abuse treatment facility, emergency shelter, psychiatric hospital, halfway house, or foster family group home.

For Seventh and Eighth Grade the SAC will identify students who:

7. Were not advanced from one grade level to the next for two or more school years;
8. Have math or reading skills that are two or more years below grade level as determined by Stanford 9, or OLSAT
9. Did not perform satisfactorily on an assessment instrument administered under Subchapter B., Chapter 39;
10. Did not maintain or are not maintaining an average of 70 percent on two or more courses during a semester;
11. Are pregnant or a parent; or
12. Are not disabled and who reside in a residential placement facility in a district in which the student's parent or legal guardian does not reside, including a detention facility, substance abuse treatment facility, emergency shelter, psychiatric hospital, halfway house, or foster family group home.

If students meet these criteria, their names will be placed in a database, where their progress can be tracked. Our most direct support to students in at risk situations is providing them high quality and diverse after-school and weekend programs outlined in section I.

**Dyslexia:** *(A full explanation of our pre-referral and referral process is located in Appendix A. All referral processes will follow state and federal due process guidelines).* The causes of dyslexia are as complex and varied as the strategies to help remedy this reading difficulty. Regardless of the causes, one thing remains certain in the IDEA Academy: all students with dyslexia will learn to read. Because of our extended day, extended week format, students with dyslexia will receive reading instruction during 3:00 p.m. to 5:00 p.m., which ensures that they miss no core academic classes while they participate in a structured reading curriculum designed to meet their specific reading challenges. Among the specific services we will provide for dyslexic students are:

- Individual tutoring;
- Intensive Phonetic instruction which emphasizes that words that carry meaning are made of sounds, and those sounds are represented by letters;
- Synthetic Phonics: sounds are blended into words for reading and broken apart into syllables for spelling;
- Comprehension study: instruction is geared toward increasing comprehension.

## Other student Activities

The current academic success of our students is a result of our high quality, compulsory school programs. While most schools offer these as an extracurricular option, all of our students participate in one or more of the following programs. What we offer students on a daily basis beginning in the fourth grade is normally reserved for students in middle and high school.

Do Something League: At the IDEA Academy, our students are given enormous independence and incredible support to create service projects that improve the community. This is consistent with our mission of creating civic-minded individuals empowered to transform their community. Using a service learning and character education program provided in partnership with *Do Something*, all IDEA Academy students identify community needs and assets, develop programs to meet these needs, design a method to measure the impact of the programs, and reflect upon ways to improve and build sustainability.

Journalism/Publishing: Students in all grades participate in a student-run, -edited, and -published newspaper. Students perform all duties from photographing to laying out the paper each week.

Drama: Students in all grade levels have an opportunity to participate in continuous, ongoing dramatic performances. Their participation encompasses all aspects of the creative efforts from writing plays and creating sets to marketing, acting, and assistant-directing. Students are currently producing *A Children's Story*.

Computer Club: Students in all grade levels work collaboratively to design web pages. The web pages currently under construction include the IDEA Academy home page and a community service page.

Karate: Under the direction of the IDEA Academy *sinsei*, students learn the art of karate.

Odyssey of the Mind: Students work together with a limited supply of resources to create inventions or products that solve problems or demonstrate innovation.

Chess Club: Students not only enjoy the game but learn strategic planning and reasoning skills.

Other activities planned include poetry club, *ballet folklórico*, science club, environmental club, band, and choir.

Athletics: Seventh and Eighth grade students will have the option to participate in the following athletic teams next year: basketball, volleyball (girls only), baseball/softball, and football. In our second year we hope to offer track; however, given our projected enrollment for the 2000-01 school year, we will limit the options to one sport per season at present.

In addition to our association with *Do Something*, we plan to partner with the *Donna Cultural Arts Center* and the *HEROES Academy*, a U.S. Department of Education funded Community

Learning Center very similar to the IDEA Academy. The HEROES Academy is in a neighboring community and serves the *colonia* of *Las Milpas*.

## Student Assessment

**Within the description of each evaluation tool the IDEA Academy will utilize is an explanation of how these tools will establish baseline levels and how they will identify student needs and strengths, both on a formative and summative basis.**

Individual Reading Inventories: IRIs will be used to determine student success in meeting the reading improvement goals for fluency and comprehension scored in terms of grade level. Our goals are for students behind grade-level to improve 1.75 years for each year they are in the IDEA Academy, and for students on grade-level to improve 1.5 years for each year in the IDEA Academy. To determine a baseline for student achievement levels, a pretest will be administered in August, and will evaluate student performance in:

1. Word Identification
2. Reading Comprehension
3. Passage Reading Fluency

The IRI will be administered again in May, and from a comparison between the two tests, net improvement will be measured.

Since we use these tests to place students in the appropriate reading class (as we have written previously, this is the only time during the day that students are homogeneously grouped) we will also administer a mid-year test between Thanksgiving and winter break. From these testing results, we will re-examine the groups into which students were placed and make necessary changes. Thus, we will avoid the primary drawback of tracking: when students are determined to be under-performing they continue to wear that label, which limits rather than improves their academic performance.

TAAS: As is the case throughout the state, TAAS will serve as perhaps the most important measure of student achievement. Our goals for TAAS passing rates and TLI gains are set forth earlier in this charter. The previous year's TAAS test will serve as our baseline measurement. (If students did not previously test, a TAAS release test will be administered and scored in the beginning of the school year.) In conjunction with other assessment tools, TAAS will provide an objective-specific portrait of students' initial strengths and weaknesses. At the end of the first, second, and third quarters, a TAAS release test will be administered to chart progress relative to both the baseline results and goals for ultimate passing rates. In this sense, the release tests will be a tool for ongoing evaluation of student progress.

Otis Lemon School Ability Test: In October of each year, the Otis Lemon School Ability Test will be administered to assess student performance in reading, writing, and math. Specifically the test evaluates:

- Letter-Word Identification
- Passage Comprehension
- Calculation (mathematical computation)

- Applied Problems (mathematical problem-solving)
- Dictation
- Writing Samples

The test will be administered again in October of the following year and will measure growth from one year to the next. Even though progress will not be measured within the same school year, the results will provide teachers a portrait of initial student needs and strengths and will rank students on a national percentile score (in terms of average national grade levels), which will ensure that students' achievement levels are benchmarked against national standards. Furthermore, the year-to-year comparison will aid in evaluating the effectiveness of the educational design.

Unit Tests and end-of-semester exams: Because of the content-intensive nature of mathematics, social studies, and science, improvement on baseline testing results over the course of the year can be a hollow victory, since students lack a knowledge of that to which they have not been exposed. This improvement often leads teachers to conclude that enormous student gains are a sign that students are progressing sufficiently. Although teacher generated pre-tests will be given, it is less important where they begin than where they finish.

In math, science and social studies, each nine week grading period and each semester will end with a test that measures student internalization of the objectives outlined in course syllabi up to that point. End of course exams, developed by teachers at the beginning of each semester and approved by the school director and dean of instruction, hold teachers and students accountable for internalizing the TEKS as well as the content outlined in E.D. Hirsch's *Core Knowledge Sequence*.

It is rare that students in the upper elementary and middle school years take final exams for social studies and science content, but doing so ensures that objectives are internalized. This objective driven approach is doubly important because the design of the science and social studies curriculum is project- and experiment-based, which can sometimes lead to an emphasis on doing the activities at the expense of understanding the purpose and objectives behind the activities.

Projects/Authentic Assessment: As already alluded to, engaging projects and science experiments formulate a significant portion of our pedagogical approach, as they link learning with a genuine, tangible product. Since the products demonstrate the culmination of student's application and synthesis of knowledge and understanding, they are ideal assessment tools. These authentic assessment products, scored on an objective rubric, will provide another measurement of student knowledge that will complement the end-of-term exams.

#### Reading/Writing Workshop Conferences:

*If we adults listen and watch closely, our children will invite us to share their worlds and their ways of living in the world. And then, when children become our teachers, showing us what they see and delight in and wonder about and reach toward, then, and only then, will we be able to extend what they know and enrich their ways of knowing.*

--Lucy McCormick Calkins, *The Art of Teaching Writing*

*When thinking about our students, we need to ask whether they are aware enough of their thinking during reading to solve problems they may encounter and enhance their comprehension as they read.*

--Ellen Keene and Susan Zimmerman, *Mosaic of Thought*

Attention needs to be paid to the daily products and processes of student thought so that lessons can be refined to meet the different nuances and strengths in reading comprehension and writing. While difficult to formally quantify on a norm referenced scale, the insights gained from conferring are at the essence of what effective teachers do: teach, assess what the students understand, and try different approaches to reach those students who failed to master the lesson on the first try. Conferring enables teachers to individually assess what skills a student has learned and actively applies as (s)he reads and writes. Determining baseline, ongoing, and summative student understanding requires teacher documentation of conferences as well as an understanding of the elements of effective conferring.

To lend a more structured approach to assessment within reading workshop conferences, the IDEA Academy has developed a Major Point Interview for Readers based upon the model provided in *Mosaic of Thought*. Used during individual conferences with students, this rubric enables teachers to quantify student progress in implementing reading comprehension skills.

Student Journals/Writing Portfolios: Writing portfolios, when they are a collection of various genres and an exhibition of student work at all phases of the writing process, will serve as an effective tool to chart student growth and identify areas of writing weakness. By definition, portfolios provide baseline, formative, and summative tools of student evaluation. Portfolio Assessment is also effective because it requires students to set their own goals for performance, evaluate progress towards those goals, evaluate overall strengths in their writing, and determine what can be done to improve their writing.

Weekly Progress Reports: The IDEA Academy will continue to provide students with weekly progress reports. These reports document all academic grades, class participation, student behavior, and overall student effort. While this level of assessment may seem like an unrealistic amount of work for teachers, we have established an efficient, effective system that students, teachers, and parents find most useful. Each Monday the reports are sent home, and each Tuesday morning they return signed by a parent/guardian.

Nine Week Grade Reports: Official school grade reports will be generated four times per year at nine week intervals. Obviously, report cards provide parents, students, and teachers with a clear portrait of student progress. They also help ensure that no students "fall through the cracks," and that all students are receiving appropriate extra help. Grade reports are one of the tools we use to assess how effective our teaching strategies are at getting students to master objectives and reach academic goals.

It is often stated that American Students are over-tested. The problem, however, is not that students are tested too often, but that too little is done with those results. The test results will provide empirical evidence about what works and what does not work.

After the IDEA Academy's first year we were pleased, if not thrilled by our academic results. Over 93% of all students in both fourth and fifth grade passed TAAS Math, and 95% of 4<sup>th</sup> grade students passed TAAS reading; these scores represented both solid passing rates

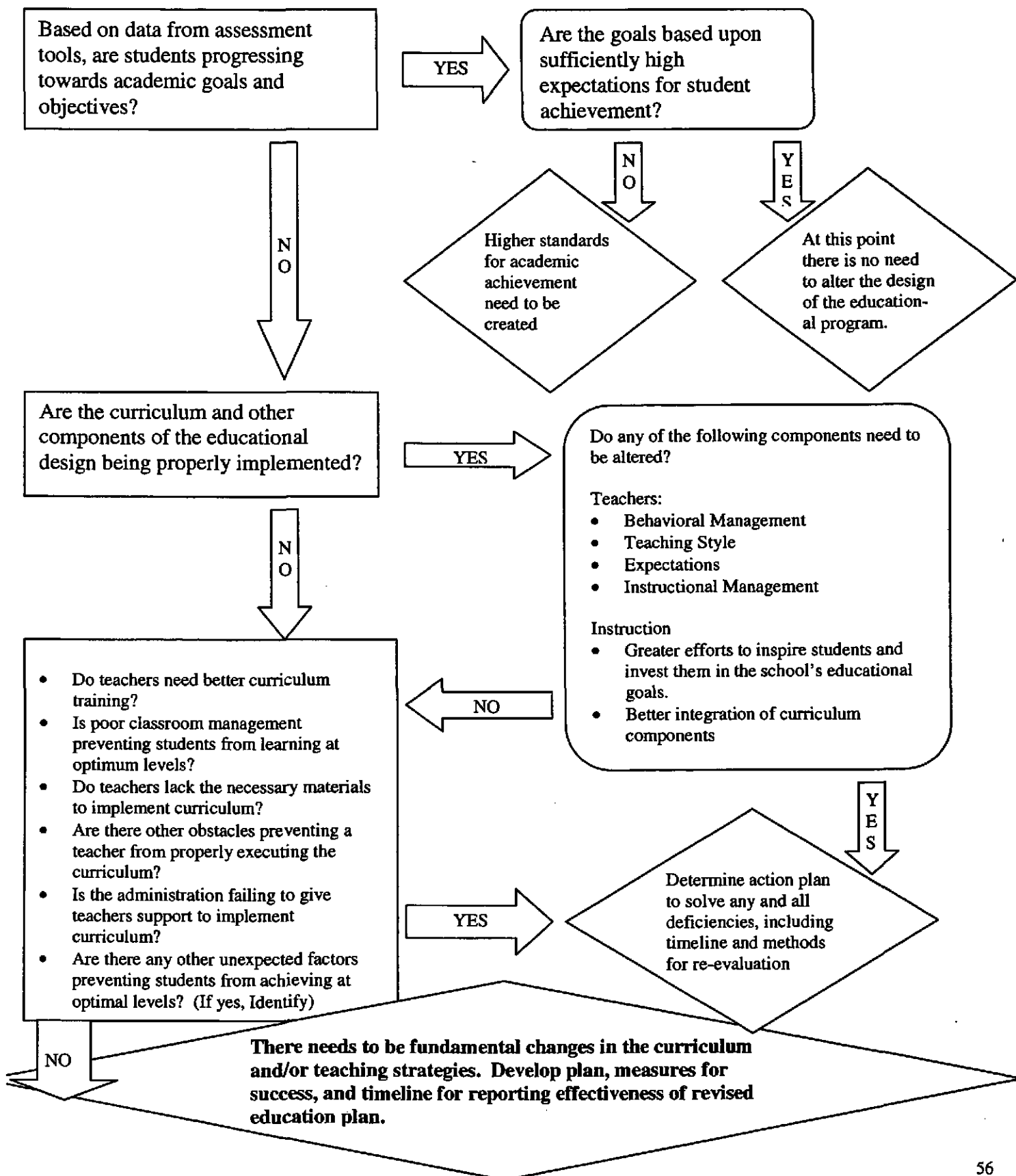
and enormous gains over previous years' TAAS scores. Troubling, though, was our comparatively low 78% passing rate on 5<sup>th</sup> Grade Reading TAAS. While still an impressive gain, this statistic, along with data from IRIs, helped us identify why we weren't reaching our fifth-grade students and, at the beginning of this, our second year, we were able to re-tool part of our reading curriculum to meet our deficiency.

From this we learned two things: 1) Assessing students ensures that the instructional program supports student achievement; and 2) we should have more closely analyzed the results of our ongoing testing early in the year to identify where our instructional approach was falling short and fix the problem.

One of the driving principles in the IDEA Academy is that students have the potential and ability to meet our rigorous academic goals. Our belief in this simple, yet important premise means that if students fall short of goals, the fault lies in a deficiency of our educational program, and not in an inherent shortcoming of our students.

At the end of each nine week grading period, the school director, dean of instruction, and teachers will meet to analyze and reflect upon progress towards our measures of success, i.e., goals and objectives. The basic template for these meetings, which will occur by grade-level, by subject, and as a collective school staff is outlined in this template:

## IDEA Academy Model for ensuring that educational programs and instructional design supports optimum student achievement





**Appendix V**

**Biographical Affidavit Form**

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: IDEA Academy, Inc., IDEA Academy

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Thomas Edward Torkelson
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: [REDACTED], Toledo, OH

5. Business Address: 703 Thornwood, Mission, TX 78572  
Business Telephone: (956) 638-4332

6. List your residences for the last ten (10) years starting with your current address, giving:

	<u>DATES</u>	<u>ADDRESS</u>	<u>CITY AND STATE</u>	<u>ZIP CODE</u>
1999 - pres	703	Thornwood, Mission, TX	Mission, TX	78572
1997-1999	4822 N. Main St		McAllen, TX	78501
	1993-1997	2204 Walnut Way	Noblesville, IN	
	1980-92	11050 Centerville, ST	Whitehouse, OH	43571

7. Education: Dates, Names, Locations and Degrees

College Class of 1997, Georgetown University, Washington, DC  
B.A. Economics  
Graduate Studies \_\_\_\_\_

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: The IDEA  
ACADEMY INCORPORATED ; THE IDEA ACADEMY

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): TRACY RENEE EPP
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: \_\_\_\_\_

4. Date and Place of Birth: \_\_\_\_\_

ST. MARY'S COUNTY, MARYLAND

5. Business Address: 3700 N. 10<sup>th</sup> St. Suite 303 McAllen TX 78501  
Business Telephone: 956 630 6781

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
06/99-Present	800 S. I Rd	Pharr TX	78577
06/99-06/98	318 Hidden Valley	Weslaco TX	78596
06/98-06/97	1604 Orange	Weslaco TX	78596
06/97-06/90	17238 Round Hill Rd	King George VA	22485

7. Education: Dates, Names, Locations and Degrees

College Case Western Reserve University, Cleveland, OH,  
B. A. History/ Political Science  
Graduate Studies \_\_\_\_\_

Others Teacher Certification through Alternative Certification Program

8. List Membership in Professional Societies and Associations: \_\_\_\_\_

Texas Council for Social Studies  
Educational Leadership

9. Present or Proposed Position with the Proposed Charter School: \_\_\_\_\_

Member of Incorporating group and Board of Directors

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
06/99-Present	Teach For America	3700 N. 10 <sup>th</sup> St. McAllen Tx 78501	Program Director
06/99-06/97	Weslaco I.S.D.	1201 S. Bridge Weslaco Tx 78596	Teacher
06/97-06/93	Student	BWRU	

11. Present employer may be contacted: Yes No (Circle One)

Former employers may be contacted: Yes No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? NO

If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? NO

If yes, give details: \_\_\_\_\_

13. 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):

Texas State Teaching Certificate

14. During the last ten (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? NO If yes, give details: \_\_\_\_\_

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? \_\_\_\_\_

If yes, give details: NO

16. Have you ever been adjudged bankrupt? NO

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? NO

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? NO

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? NO. If so, please furnish details: \_\_\_\_\_

Dated and signed this 19<sup>th</sup> day of January,  
19 2000, at McAllen, Texas

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.

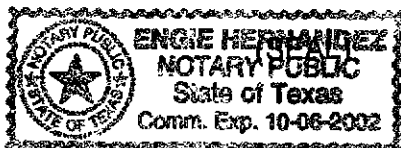
Tracy Epp  
(Signature of Affiant)

State of Texas

County of Hidalgo

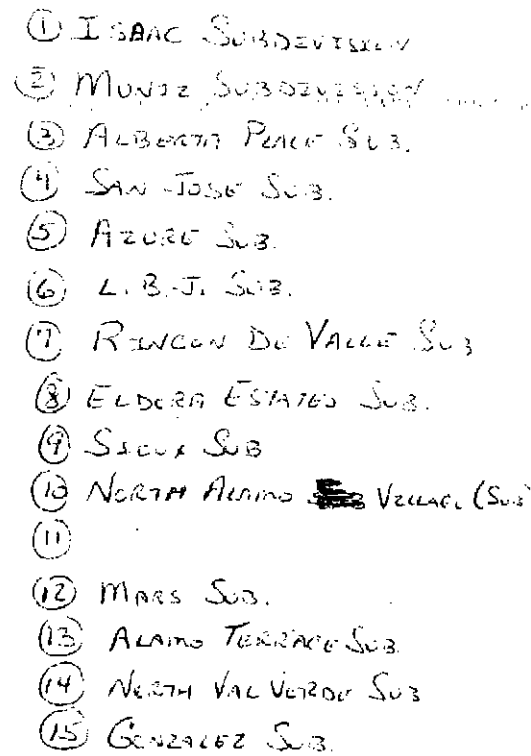
Personally appeared before me the above named Tracy Epp  
personally known to me, who, being duly sworn, deposes and says that he/she executed the above instrument and that the statements and answers contained therein are true and correct to the best of his/her knowledge and belief.

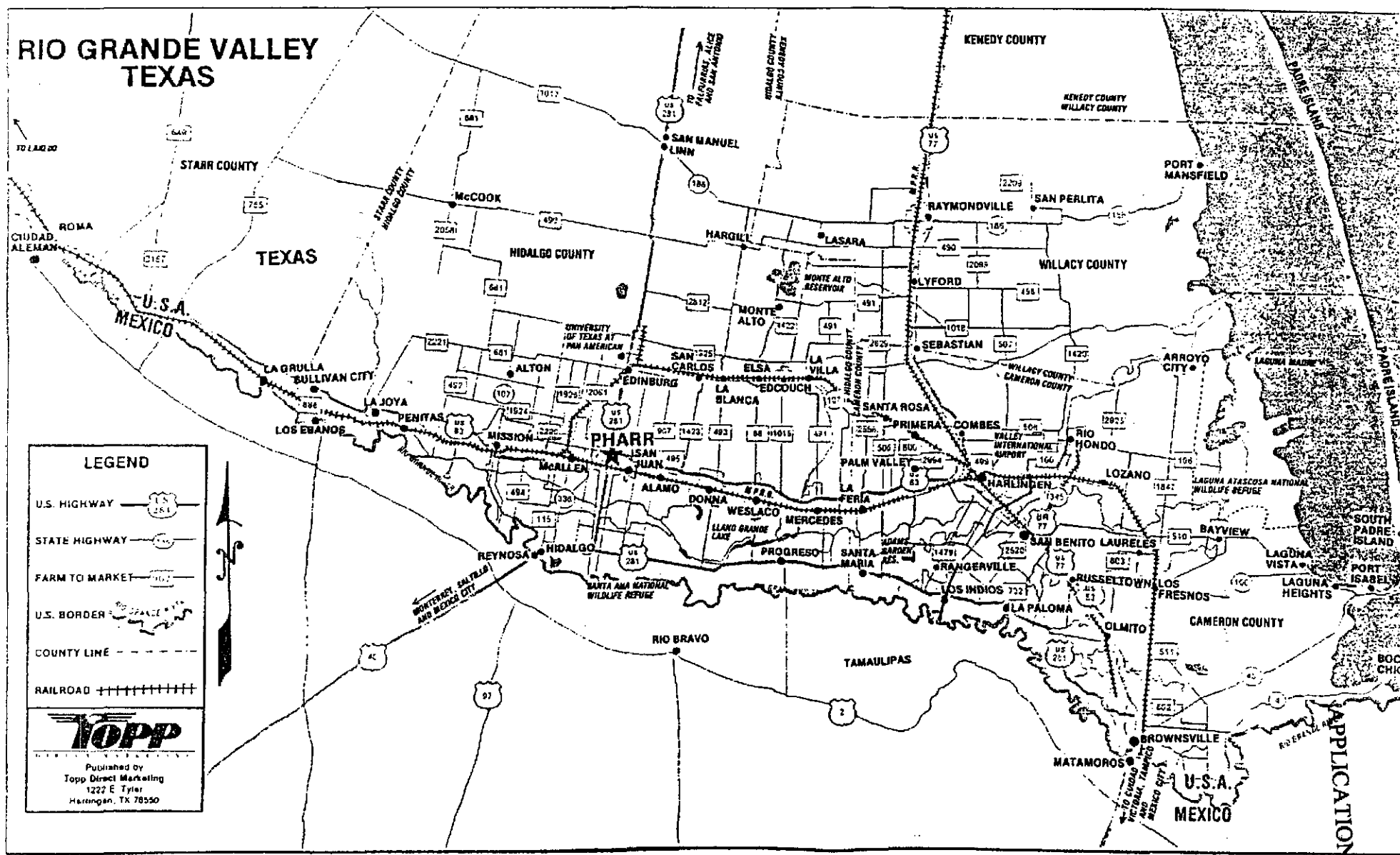
Subscribed and sworn to before me this 19th day of January, 19 2000



Engie Hernandez  
(Notary Public)  
My commission expires 10/06/2002

00000000





012

## APPLICATION

**Name of Proposed School:** IDEA Academy

**Name of Sponsoring Entity:** IDEA Academy, Inc.

A review of your application by agency legal staff has identified issues requiring clarification. Please respond to the questions listed below or provide the additional documentation requested. Note that if a charter is awarded to your organization, the charter contract will incorporate all statements and representations provided in response to this request as if provided in the application submitted by the organization.

- 1) Please clarify whether the organization will create a school management board that is additional to the board of the sponsoring entity. ✓
- 2) Please indicate whether the organization has entered into an agreement for use of a facility. If so, please provide a copy. If not, please explain status of negotiations. ✓
- 3) Please provide an original or photocopy of the Notice of Intent to Apply for an Open-Enrollment Charter School published in a local newspaper. In other words, provide a copy or clipping of the notice from the newspaper itself. ✓



- 1) Please clarify whether the organization will create a school management board that is additional to the board of the sponsoring entity:

The managing board of the sponsoring entity will also be the governing board of the school. There will be no additional management board created.

- 2) Please indicate whether the organization has entered into an agreement for use of facility:

Since we have not yet received official approval for our charter school, we have signed no leases for facility use. However, we have been working extremely closely with the deacons of the First Baptist Church of Donna for use of their educational building. We have received provisional approval to lease their educational building next year contingent upon the approval of our charter application. Furthermore, we have met with the church's architect to create a facilities renovation plan. The renovation will be complete by mid-summer, and will result in nine classrooms, a cafeteria, and bathroom facilities.

- 3) Please provide a copy of the Notice of Intent to Apply for an Open-Enrollment Charter School published in a local newspaper:

We scanned a copy of the article into our this document. The text is identical to that contained in our charter application, but this scanned document is as it appeared in the *Mid-Valley Town Crier*.

- 4) Electronic copy of the application: Given to Dr. D. Havens on 2-26-00 at charter school conference.
- 5) Please send a copy of the statement impact proof of delivery: Given to Dr. D. Havens on 2-26-00 at charter school conference. Our documentation was a copy of the district's incoming mail log, which was provided to us by the Superintendent's secretary.
- 6) Copy of IRS application for non-profit status: Given to Dr. D. Havens on 2-26-00 at charter school conference.

## CORRESPONDENCE LOG

Today's Date: January 24, 2000

APPLICATION

DATE R	DATE P	TO	FROM/TOPIC	COMMENTS
1/21/00	1/24/00	Andy Martinez	Texas Educational Consultative Services	Read, Handle
1/17/00	1/24/00	Maria C. Rodriguez	KTRA Administrator Session	Read, Handle
				Read, Handle
1/21/00	1/24/00	Agapito Navarro	Bank of America	Read, Handle
1/21/00	1/24/00	Maria C. Rodriguez	Region One AEIS IT 99	Read, Handle
1/21/00	1/24/00	Frances Jones	Sabal Palms Writing Project	Read, Handle
1/21/00	1/24/00	Rolando De La Rosa	TEA-Assessment Requirements for Students of Limited English Proficiency	Read, Handle
1/21/00	1/24/00	Rolando De La Rosa	Region One-Federal Court Decision on TAAS Exit Test	Read, Handle
1/21/00	1/24/00	Agapito Navarro	AmeriCorp Youth Harvest Invoice	Read, Handle
1/17/00	1/24/00	Andy Martinez	TEA-Home Schools	Read, Handle
1/17/00	1/24/00	Robert Garcia	TEA-FHA Officer	Read, Handle, Review w/me
1/17/00	1/24/00	Frances Jones	TEA-USDE Blue Ribbonf schools	Read, Handle

standards for student achievement and... Students of the IDEA Academy attend school until 5:00 each day and... Saturday. During the 2000-01 school year, the school will serve students in grades 4-8. Grades 4-8 will be served for each year thereafter. The IDEA Academy will open in August of 2000.

Any written comments about any aspect of the proposed school or its sponsoring entity, must be communicated in the form of a signed letter to the SBOE. Only letters specifically addressing a proposed school will be considered by the board. Letters may be sent to the following address: Texas Education Agency, Division of Charter Schools, 1701 N. Congress, Austin, TX 78701.

...to apply to other public schools. The... disruptive information about the proposed school is being provided for the benefit of the community in which the school will be... approved.

IDEA Academy, Inc. (Individuals Dedicated to Excellence and Achievement)  
Board of Directors: Tom Torkelson  
Members of sponsoring entity and... board: Tom Torkelson, Tracy... Maria Balli, Daniel Hernandez, and... Cook

Proposed location: Donna, TX

IDEA Academy is an extended day school... increasing student achievement... an accelerated academic program and...

## to apply for open-enrollment charter school

IDEA Academy, Inc. is applying to the... Board of Education for approval to open... an open-enrollment charter school to be... located in Donna, TX. Charter schools are... public schools established by nonprofit organi-... institutions of higher education, or gov-... entities. These schools are publicly... and are free from many state regula-

## Notice of intent

**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31 2001**

**Charter School Budget Categories**

	<b>Object Code</b>	<b>Unrestricted Net Assets</b>	<b>Temporarily Restricted Net Assets</b>	<b>Total</b>
<b>Net Assets at Beginning of Year</b>				<b>\$0</b>
<b>Estimated Revenues:</b>				
Local Sources				<b>\$0</b>
State Sources				<b>\$911,966</b>
Federal Sources				<b>\$168,886</b>
Other Sources				<b>\$40,000</b>
<b>Total Estimated Revenues</b>		<b>\$0</b>	<b>\$0</b>	<b>\$1,120,852</b>
<b>Estimated Expenses:</b>				
Payroll Costs	6100			<b>\$480,000</b>
Professional and Contracted Services	6200			<b>\$277,000</b>
Supplies and Materials	6300			<b>\$200,000</b>
Other Operating Costs	6400			<b>\$182,800</b>
Debt Expense	6500			<b>\$0</b>
<b>Total Estimated Expenses</b>		<b>\$0</b>	<b>\$0</b>	<b>\$1,139,800</b>
<b>Gains</b>	7950			<b>\$18,948</b>
<b>Losses</b>	8950			<b>\$0</b>
<b>Change in Net Assets</b>		<b>\$0</b>	<b>\$0</b>	<b>\$18,948</b>
<b>Net Assets at End of Year</b>		<b>\$0</b>	<b>\$0</b>	<b>\$18,948</b>

Charter School The IDEA Academy, Inc.

For the Fiscal Year Ended August 31 2001

## Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Instruction</b>	<b>11</b>				
Payroll Costs		6100			\$480,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$190,000
Other Operating Costs		6400			\$102,000
Debt Expense		6500			\$0
<b>Total Instruction</b>			\$0	\$0	\$772,800
<b>Instructional Resources and Media Services</b>	<b>12</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Instructional Resources and Media Services</b>			\$0	\$0	\$0
<b>Curriculum Development and Instructional Staff Development</b>	<b>13</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Curriculum and Instructional Staff Development</b>			\$0	\$0	\$0

**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31 2001**

**Charter School Budget Categories (Continued)**

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Instructional Leadership: 21</b>					
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total Instructional Leadership</b>			\$0	\$0	\$0
<b>School Leadership: 23</b>					
Payroll Costs		6100			\$20,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total School Leadership</b>			\$0	\$0	\$20,000
<b>Guidance, Counseling and Evaluation Services 31</b>					
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$3,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total Guidance, Counseling and Evaluation Services</b>			\$0	\$0	\$3,000

Charter School The IDEA Academy, Inc.

Page 4

For the Fiscal Year Ended August 31

2001

## Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Social Work Services:</b>	<b>32</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Social Work Services</b>			\$0	\$0	\$0
<b>Health Services:</b>	<b>33</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$8,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Health Services</b>			\$0	\$0	\$8,000
<b>Student Transportation</b>	<b>34</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$107,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Student Transportation</b>			\$0	\$0	\$107,000

Charter School The IDEA Academy, Inc.  
For the Fiscal Year Ended August 31 20001

APPLICATION  
Page 5

Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Food Services:</b>	<b>35</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$100,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Food Services</b>			<b>\$0</b>	<b>\$0</b>	<b>\$100,000</b>
<b>Cocurricular/Extracurricular Activities:</b>	<b>36</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$5,000
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Cocurricular/Extracurricular Activities:</b>			<b>\$0</b>	<b>\$0</b>	<b>\$5,000</b>
<b>General Administration:</b>	<b>41</b>				
Payroll Costs		6100			\$25,000
Professional and Contracted Services		6200			\$20,000
Supplies and Materials		6300			\$3,500
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total General Administration</b>			<b>\$0</b>	<b>\$0</b>	<b>\$48,500</b>



**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31 2001**

**Charter School Budget Categories (Continued)**

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Plant Maintenance and Operations:</b>					
	51				
Payroll Costs		6100			\$19,400
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$2,000
Other Operating Costs		6400			\$45,000
Debt Expense		6500			\$0
<b>Total Plant Maintenance and Operations</b>			\$0	\$0	\$66,400
<b>Security and Monitoring Services:</b>					
	52				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Security and Monitoring Services:</b>			\$0	\$0	\$0
<b>Data Processing Services:</b>					
	53				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Data Processing Services</b>			\$0	\$0	\$0

Charter School The IDEA Academy, Inc.  
For the Fiscal Year Ended August 31 2001

APPLICATION  
Page 7

Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Community Services:</b>	<b>61</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Community Services</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Fund Raising:</b>	<b>81</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Fund Raising</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31 2002**

**APPLICATION**  
**Page 1**

**Charter School Budget Categories**

	<b>Object Code</b>	<b>Unrestricted Net Assets</b>	<b>Temporarily Restricted Net Assets</b>	<b>Total</b>
<b>Net Assets at Beginning of Year</b>				<b>\$18,948</b>
<b>Estimated Revenues:</b>				
Local Sources				<b>\$0</b>
State Sources				<b>\$1,087,280</b>
Federal Sources				<b>\$206,886</b>
Other Sources				<b>\$60,000</b>
<b>Total Estimated Revenues</b>		<b>\$0</b>	<b>\$0</b>	<b>\$1,354,166</b>
<b>Estimated Expenses:</b>				
Payroll Costs	6100			<b>\$537,000</b>
Professional and Contracted Services	6200			<b>\$242,280</b>
Supplies and Materials	6300			<b>\$170,000</b>
Other Operating Costs	6400			<b>\$260,000</b>
Debt Expense	6500			<b>\$0</b>
<b>Total Estimated Expenses</b>		<b>\$0</b>	<b>\$0</b>	<b>\$1,209,280</b>
<b>Gains</b>	7950			<b>\$72,000</b>
<b>Losses</b>	8950			<b>\$0</b>
<b>Change in Net Assets</b>		<b>\$0</b>	<b>\$0</b>	<b>\$72,000</b>
<b>Net Assets at End of Year</b>		<b>\$0</b>	<b>\$0</b>	<b>\$90,948</b>

**Charter School Budget Categories (Continued)**

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Instruction</b>	<b>11</b>				
Payroll Costs		6100			\$560,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$190,000
Other Operating Costs		6400			\$100,000
Debt Expense		6500			\$0
<b>Total Instruction</b>			<b>\$0</b>	<b>\$0</b>	<b>\$850,000</b>
<b>Instructional Resources and Media Services</b>	<b>12</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Instructional Resources and Media Services</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Curriculum Development and Instructional Staff Development</b>	<b>13</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Curriculum and Instructional Staff Development</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

**Charter School Budget Categories (Continued)**

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Instructional Leadership: 21</b>					
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total Instructional Leadership</b>			\$0	\$0	\$0
<b>School Leadership: 23</b>					
Payroll Costs		6100			\$21,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total School Leadership</b>			\$0	\$0	\$21,000
<b>Guidance, Counseling and Evaluation Services 31</b>					
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$3,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total Guidance, Counseling and Evaluation Services</b>			\$0	\$0	\$3,000

**Charter School The IDEA Academy**  
**For the Fiscal Year Ended August 31**      2002

Page 4

**Charter School Budget Categories (Continued)**

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Social Work Services:</b>	<b>32</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Social Work Services</b>			\$0	\$0	\$0
<b>Health Services:</b>	<b>33</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$8,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Health Services</b>			\$0	\$0	\$8,000
<b>Student Transportation</b>	<b>34</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$117,280
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Student Transportation</b>			\$0	\$0	\$117,280

**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31 2002**

**Charter School Budget Categories (Continued)**

	<b>Function Code</b>	<b>Object Code</b>	<b>Unrestricted Net Assets</b>	<b>Temporarily Restricted Net Assets</b>	<b>Total</b>
<b>Food Services:</b>	<b>35</b>				
Payroll Costs		6100			\$125,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Food Services</b>			<b>\$0</b>	<b>\$0</b>	<b>\$125,000</b>
<b>Cocurricular/Extracurricular Activities:</b>	<b>36</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Cocurricular/Extracurricular Activities:</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>General Administration:</b>	<b>41</b>				
Payroll Costs		6100			\$25,000
Professional and Contracted Services		6200			\$14,000
Supplies and Materials		6300			\$5,000
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total General Administration</b>			<b>\$0</b>	<b>\$0</b>	<b>\$39,000</b>

Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Plant Maintenance and Operations:</b>	51				
Payroll Costs		6100			\$36,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$2,000
Other Operating Costs		6400			\$60,000
Debt Expense		6500			\$0
<b>Total Plant Maintenance and Operations</b>			\$0	\$0	\$98,000
<b>Security and Monitoring Services:</b>	52				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Security and Monitoring Services:</b>			\$0	\$0	\$0
<b>Data Processing Services:</b>	53				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Data Processing Services</b>			\$0	\$0	\$0



Charter School The IDEA Academy, Inc.  
For the Fiscal Year Ended August 31 2002

Page 7

---

**Charter School Budget Categories (Continued)**


---

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Community Services:</b>	61				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Community Services</b>			\$0	\$0	\$0
<b>Fund Raising:</b>	81				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Fund Raising</b>			\$0	\$0	\$0

**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31** 2003

Page 1

---

**Charter School Budget Categories**

---

	<b>Object Code</b>	<b>Unrestricted Net Assets</b>	<b>Temporarily Restricted Net Assets</b>	<b>Total</b>
<b>Net Assets at Beginning of Year</b>				<b>\$0</b>
<b>Estimated Revenues:</b>				
Local Sources				
State Sources				<b>\$1,442,000</b>
Federal Sources				<b>\$280,500</b>
Other Sources				<b>\$85,000</b>
<b>Total Estimated Revenues</b>		<b>\$0</b>	<b>\$0</b>	<b>\$1,807,500</b>
<b>Estimated Expenses:</b>				
Payroll Costs	6100			<b>\$741,000</b>
Professional and Contracted Services	6200			<b>\$162,500</b>
Supplies and Materials	6300			<b>\$180,000</b>
Other Operating Costs	6400			<b>\$320,000</b>
Debt Expense	6500			<b>\$0</b>
<b>Total Estimated Expenses</b>		<b>\$0</b>	<b>\$0</b>	<b>\$1,403,500</b>
<b>Gains</b>	7950			<b>\$404,000</b>
<b>Losses</b>	8950			<b>\$0</b>
<b>Change in Net Assets</b>		<b>\$0</b>	<b>\$0</b>	<b>\$404,000</b>
<b>Net Assets at End of Year</b>		<b>\$0</b>	<b>\$0</b>	<b>\$494,948</b>

Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Instruction</b>	<b>11</b>				
Payroll Costs		6100			\$720,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$195,000
Other Operating Costs		6400			\$112,000
Debt Expense		6500			\$0
<b>Total Instruction</b>			<b>\$0</b>	<b>\$0</b>	<b>\$1,027,000</b>
<b>Instructional Resources and Media Services</b>	<b>12</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Instructional Resources and Media Services</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Curriculum Development and Instructional Staff Development</b>	<b>13</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$8,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Curriculum and Instructional Staff Development</b>			<b>\$0</b>	<b>\$0</b>	<b>\$8,000</b>

**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31** 2003

Page 3

---

**Charter School Budget Categories (Continued)**


---

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<hr/>					
<b>Instructional Leadership:</b>	21				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total Instructional Leadership</b>			\$0	\$0	\$0
<hr/>					
<b>School Leadership:</b>	23				
Payroll Costs		6100			\$22,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total School Leadership</b>			\$0	\$0	\$22,000
<hr/>					
<b>Guidance, Counseling and Evaluation Services</b>	31				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$3,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Interest		6500			\$0
<b>Total Guidance, Counseling and Evaluation Services</b>			\$0	\$0	\$3,000

Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Social Work Services:</b>	<b>32</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Social Work Services</b>			\$0	\$0	\$0
<b>Health Services:</b>	<b>33</b>				
Payroll Costs		6100			\$18,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$1,000
Debt Expense		6500			\$0
<b>Total Health Services</b>			\$0	\$0	\$19,000
<b>Student Transportation</b>	<b>34</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$180,000
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Student Transportation</b>			\$0	\$0	\$180,000

**Charter School The IDEA Academy, Inc.**  
**For the Fiscal Year Ended August 31 2003**

Page 5

---

**Charter School Budget Categories (Continued)**

---

	<b>Function Code</b>	<b>Object Code</b>	<b>Unrestricted Net Assets</b>	<b>Temporarily Restricted Net Assets</b>	<b>Total</b>
<b>Food Services:</b>	<b>35</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$187,500
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Food Services</b>			<b>\$0</b>	<b>\$0</b>	<b>\$187,500</b>
<b>Cocurricular/Extracurricular Activities:</b>	<b>36</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Cocurricular/Extracurricular Activities:</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>General Administration:</b>	<b>41</b>				
Payroll Costs		6100			\$44,000
Professional and Contracted Services		6200			\$14,000
Supplies and Materials		6300			\$10,000
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total General Administration</b>			<b>\$0</b>	<b>\$0</b>	<b>\$68,000</b>

Charter School Budget Categories (Continued)

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Plant Maintenance and Operations:</b>	<b>51</b>				
Payroll Costs		6100			\$36,000
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$2,400
Other Operating Costs		6400			\$60,000
Debt Expense		6500			\$0
<b>Total Plant Maintenance and Operations</b>			\$0	\$0	\$98,400
<b>Security and Monitoring Services:</b>	<b>52</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Security and Monitoring Services:</b>			\$0	\$0	\$0
<b>Data Processing Services:</b>	<b>53</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Data Processing Services</b>			\$0	\$0	\$0

**Charter School Budget Categories (Continued)**

	Function Code	Object Code	Unrestricted Net Assets	Temporarily Restricted Net Assets	Total
<b>Community Services:</b>	<b>61</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Community Services</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Fund Raising:</b>	<b>81</b>				
Payroll Costs		6100			\$0
Professional and Contracted Services		6200			\$0
Supplies and Materials		6300			\$0
Other Operating Costs		6400			\$0
Debt Expense		6500			\$0
<b>Total Fund Raising</b>			<b>\$0</b>	<b>\$0</b>	<b>\$0</b>



**Application for Recognition of Exemption  
Under Section 501(c)(3) of the Internal Revenue Code**

**APPLICATION**

OMB No. 1545-0056

Note: If exempt status is approved, this application will be open for public inspection.

Read the instructions for each Part carefully.

**A User Fee must be attached to this application.**

If the required information and appropriate documents are not submitted along with Form 8718 (with payment of the appropriate user fee), the application may be returned to you.

**Complete the Procedural Checklist on page 8 of the instructions.**

**Part I Identification of Applicant**


<b>1a</b> Full name of organization (as shown in organizing document)  <u>IDEA Academy, Inc.</u>		<b>2</b> Employer identification number (EIN) (If none, see page 3 of the <b>Specific Instructions</b> ).  <u>Applied For</u>
<b>1b</b> c/o Name (if applicable)  <u>Thomas E. Torkelson</u>		<b>3</b> Name and telephone number of person to be contacted if additional information is needed  <u>(956) 638-4332</u>
<b>1c</b> Address (number and street)  <u>703 Thornwood Ave.</u>	Room/Suite	<b>4</b> Month the annual accounting period ends  <u>July</u>
<b>1d</b> City, town, or post office, state, and ZIP + 4. If you have a foreign address, see <b>Specific Instructions</b> for Part I, page 3.  <u>Mission, TX 78572</u>		<b>5</b> Date incorporated or formed
<b>1e</b> Web site address		<b>6</b> Check here if applying under section: a <input type="checkbox"/> 501(e) b <input type="checkbox"/> 501(f) c <input type="checkbox"/> 501(k) d <input type="checkbox"/> 501(n)
<b>7</b> Did the organization previously apply for recognition of exemption under this Code section or under any other section of the Code? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," attach an explanation.		
<b>8</b> Is the organization required to file Form 990 (or Form 990-EZ)? ..... <input type="checkbox"/> N/A <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "No," attach an explanation (see page 3 of the <b>Specific Instructions</b> ).		
<b>9</b> Has the organization filed Federal income tax returns or exempt organization information returns? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," state the form numbers, years filed, and Internal Revenue office where filed.		

**10** Check the box for the type of organization. ATTACH A CONFORMED COPY OF THE CORRESPONDING ORGANIZING DOCUMENTS TO THE APPLICATION BEFORE MAILING. (See **Specific Instructions** for Part I, Line 10, on page 3.) See also Pub. 557 for examples of organizational documents.)

- a ☒ **Corporation** — Attach a copy of the Articles of Incorporation (including amendments and restatements) showing approval by the appropriate state official; also include a copy of the bylaws.
- b ☐ **Trust** — Attach a copy of the Trust indenture or Agreement, including all appropriate signatures and dates.
- c ☐ **Association** — Attach a copy of the Articles of Association, Constitution, or other creating document, with a declaration (see instructions) or other evidence the organization was formed by adoption of the document by more than one person; also include a copy of the bylaws.

If the organization is a corporation or an unincorporated association that has not yet adopted bylaws, check here ☐

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

Please Sign Here  Thomas Torkelson, Pres.  
(Signature) (Type or print name and title or authority of signer)

02-12-00  
(Date)

For Paperwork Reduction Act Notice, see page 7 of the instructions.

**Part II** Activities and Operational Information

- 1 Provide a detailed narrative description of all the activities of the organization — past, present, and planned. Do not merely refer to or repeat the language in the organizational document. List each activity separately in the order of importance based on the relative time and other resources devoted to the activity. Indicate the percentage of time for each activity. Each description should include, as a minimum, the following: (a) a detailed description of the activity including its purpose and how each activity furthers your exempt purpose; (b) when the activity was or will be initiated; and (c) where and by whom the activity will be conducted.

The purpose of this organization is to form a charter school in partnership with the state of Texas to serve the Donna, TX area.

See the attached narrative.

- 2 What are or will be the organization's sources of financial support? List in order of size.

See Attached

- 3 Describe the organization's fundraising program, both actual and planned, and explain to what extent it has been put into effect. Include details of fundraising activities such as selective mailings, formation of fundraising committees, use of volunteers or professional fundraisers, etc. Attach representative copies of solicitations for financial support.

See Attached

**Part II** Activities and Operational Information (Continued)**4** Give the following information about the organization's governing body:

a Names, addresses, and titles of officers, directors, trustees, etc.	b Annual compensation
Thomas Torkelson, Director, President-703 Thornwood, Mission, TX 78572	-0-
Thelma Balli, Director and Treas., Box 2206 Alamo, TX 78516	-0-
Tracy Epp, Director and Sec'y, 800 S. I Rd, Pharr, TX 78577	-0-
Daniel Hernandez, Director, 313 E 10th St 78562	-0-
Daniel Black, Director, 716 S. Louisiana, Weslaco, TX	-0-

- c** Do any of the above persons serve as members of the governing body by reason of being public officials or being appointed by public officials? ☐ Yes ☒ No  
If "Yes," name those persons and explain the basis of their selection or appointment.

- d** Are any members of the organization's governing body "disqualified persons" with respect to the organization (other than by reason of being a member of the governing body) or do any of the members have either a business or family relationship with "disqualified persons"? (See Specific Instructions for Part II, Line 4d, on page 3.) ☐ Yes ☒ No  
If "Yes," explain.

- 5** Does the organization control or is it controlled by any other organization? ☐ Yes ☒ No  
Is the organization the outgrowth of (or successor to) another organization, or does it have a special relationship with another organization by reason of interlocking directorates or other factors? ☐ Yes ☒ No  
If either of these questions is answered "Yes," explain.

- 6** Does or will the organization directly or indirectly engage in any of the following transactions with any political organization or other exempt organization (other than a 501(c)(3) organization): (a) grants; (b) purchases or sales of assets; (c) rental of facilities or equipment; (d) loans or loan guarantees; (e) reimbursement arrangements; (f) performance of services, membership, or fundraising solicitations; or (g) sharing of facilities, equipment, mailing lists or other assets, or paid employees? ☒ Yes ☒ No  
If "Yes," explain fully and identify the other organizations involved.

Yes, we anticipate grants from state of Texas (they provide most charter school funding) and the US Department of Education.

- 7** Is the organization financially accountable to any other organization? ☒ Yes ☐ No  
If "Yes," explain and identify the other organization. Include details concerning accountability or attach copies of reports if any have been submitted.

Texas Education Agency

**Part II** Activities and Operational Information (Continued)

- 8 What assets does the organization have that are used in the performance of its exempt function? (Do not include property producing investment income.) If any assets are not fully operational, explain their status, what additional steps remain to be completed, and when such final steps will be taken. If none, indicate "N/A."

See Attached

- 9 Will the organization be the beneficiary of tax-exempt bond financing within the next 2 years? ☐ Yes ☒ No

- 10a Will any of the organization's facilities or operations be managed by another organization or individual under a contractual agreement? ☐ Yes ☒ No

- b Is the organization a party to any leases? ☐ Yes ☒ No  
If either of these questions is answered "Yes," attach a copy of the contracts and explain the relationship between the applicant and the other parties.

- 11 Is the organization a membership organization? ☐ Yes ☒ No  
If "Yes," complete the following:

a Describe the organization's membership requirements and attach a schedule of membership fees and dues.

b Describe the organization's present and proposed efforts to attract members and attach a copy of any descriptive literature or promotional material used for this purpose.

c What benefits do (or will) the members receive in exchange for their payment of dues?

- 12a If the organization provides benefits, services, or products, are the recipients required, or will they be required, to pay for them? ☐ N/A ☐ Yes ☒ No  
If "Yes," explain how the charges are determined and attach a copy of the current fee schedule.

- b Does or will the organization limit its benefits, services, or products to specific individuals or classes of individuals? ☒ N/A ☐ Yes ☐ No  
If "Yes," explain how the recipients or beneficiaries are or will be selected.

See Attached

- 13 Does or will the organization attempt to influence legislation? ☐ Yes ☒ No  
If "Yes," explain. Also, give an estimate of the percentage of the organization's time and funds that it devotes or plans to devote to this activity.

- 14 Does or will the organization intervene in any way in political campaigns, including the publication or distribution of statements? ☐ Yes ☒ No  
If "Yes," explain fully.

**Part III** Technical Requirements

- 1 Are you filing Form 1023 within 15 months from the end of the month in which your organization was created or formed? ☐ Yes ☒ No

If you answer "Yes," do not answer questions on lines 2 through 6 below.

- 2 If one of the exceptions to the 15-month filing requirement shown below applies, check the appropriate box and proceed to question 7.

**Exceptions** — You are not required to file an exemption application within 15 months if the organization:

- ☐ a Is a church, interchurch organization of local units of a church, a convention or association of churches, or an integrated auxiliary of a church. See **Specific Instructions**, Line 2a, on page 4;
- ☐ b Is not a private foundation and normally has gross receipts of not more than \$5,000 in each tax year; or
- ☐ c Is a subordinate organization covered by a group exemption letter, but only if the parent or supervisory organization timely submitted a notice covering the subordinate.

- 3 If the organization does not meet any of the exceptions on line 2 above, are you filing Form 1023 within 27 months from the end of the month in which the organization was created or formed? ☐ Yes ☐ No

If "Yes," your organization qualifies under Regulation section 301.9100-2, for an automatic 12-month extension of the 15-month filing requirement. Do not answer questions 4 through 6.

If "No," answer question 4.

- 4 If you answer "No" to question 3, does the organization wish to request an extension of time to apply under the "reasonable action and good faith" and the "no prejudice to the interest of the government" requirements of Regulations section 301.9100-3? ☐ Yes ☐ No

If "Yes," give the reasons for not filing this application within the 27-month period described in question 3. See **Specific Instructions**, Part III, Line 4, before completing this item. Do not answer questions 5 and 6.

If "No," answer questions 5 and 6.

- 5 If you answer "No" to question 4, your organization's qualification as a section 501(c)(3) organization can be recognized only from the date this application is filed. Therefore, do you want us to consider the application as a request for recognition of exemption as a section 501(c)(3) organization from the date the application is received and not retroactively to the date the organization was created or formed? ☐ Yes ☐ No
- 6 If you answer "Yes" to question 5 above and wish to request recognition of section 501(c)(4) status for the period beginning with the date the organization was formed and ending with the date the Form 1023 application was received (the effective date of the organization's section 501(c)(3) status), check here ☐ and attach a completed page 1 of Form 1024 to this application.

**Part III** Technical Requirements (Continued)

7 Is the organization a private foundation?

☐ Yes (Answer question 8.)☒ No (Answer question 9 and proceed as instructed.)

8 If you answer "Yes" to question 7, does the organization claim to be a private operating foundation?

☐ Yes (Complete Schedule E.)☐ No

After answering question 8 on this line, go to line 14 on page 7.

9 If you answer "No" to question 7, indicate the public charity classification the organization is requesting by checking the box below that most appropriately applies:

**THE ORGANIZATION IS NOT A PRIVATE FOUNDATION BECAUSE IT QUALIFIES:**a ☐ As a church or a convention or association of churches  
(CHURCHES MUST COMPLETE SCHEDULE A.)Sections 509(a)(1)  
and 170(b)(1)(A)(i)b ☒ As a school (MUST COMPLETE SCHEDULE B.)Sections 509(a)(1)  
and 170(b)(1)(A)(ii)c ☐ As a hospital or cooperative hospital service organization, or a  
medical research organization operated in conjunction with a  
hospital (These organizations, except for hospital service  
organizations, MUST COMPLETE SCHEDULE C.)Sections 509(a)(1)  
and 170(b)(1)(A)(iii)d ☐ As a governmental unit described in section 170(c)(1).Sections 509(a)(1)  
and 170(b)(1)(A)(v)e ☐ As being operated solely for the benefit of, or in connection with,  
one or more of the organizations described in a through d, g, h, or i  
(MUST COMPLETE SCHEDULE D.)

Section 509(a)(3)

f ☐ As being organized and operated exclusively for testing for public safety.

Section 509(a)(4)

g ☐ As being operated for the benefit of a college or university that is  
owned or operated by a governmental unit.Sections 509(a)(1)  
and 170(b)(1)(A)(vi)h ☐ As receiving a substantial part of its support in the form of  
contributions from publicly supported organizations, from a  
governmental unit, or from the general public.Sections 509(a)(1)  
and 170(b)(1)(A)(vi)i ☐ As normally receiving not more than one-third of its support from  
gross investment income and more than one-third of its support from  
contributions, membership fees, and gross receipts from activities  
related to its exempt functions (subject to certain exceptions).

Section 509(a)(2)

j ☐ The organization is a publicly supported organization but is not sure  
whether it meets the public support test of h or i. The organization  
would like the IRS to decide the proper classification.Sections 509(a)(1)  
and 170(b)(1)(A)(vi)  
or Section 509(a)(2)

If you checked one of the boxes a through f in question 9, go to question

14. If you checked box g in question 9, go to questions 11 and 12.

If you checked box h, i, or j, in question 9, go to question 10.

**Part III** Technical Requirements (Continued)

- 10 If you checked box h, i, or j in question 9, has the organization completed a tax year of at least 8 months?
- ☐ Yes — Indicate whether you are requesting:
- ☐ A definitive ruling. (Answer questions 11 through 14.)
- ☐ An advance ruling. (Answer questions 11 and 14 and attach two Forms 872-C completed and signed.)
- ☐ No — You must request an advance ruling by completing and signing two Forms 872-C and attaching them to the Form 1023.
- 
- 11 If the organization received any unusual grants during any of the tax years shown in Part IV-A, Statement of Revenue and Expenses, attach a list for each year showing the name of the contributor, the date and the amount of the grant, and a brief description of the nature of the grant.
- 
- 12 If you are requesting a definitive ruling under section 170(b)(1)(A)(iv) or (vi), check here ☐ and:
- a Enter 2% of line 8, column (e), Total, of Part IV-A. ....
- b Attach a list showing the name and amount contributed by each person (other than a governmental unit or "publicly supported" organization) whose total gifts, grants, contributions, etc., were more than the amount entered on line 12a above.
- 
- 13 If you are requesting a definitive ruling under section 509(a)(2), check here ☐ and:
- a For each of the years included on lines 1, 2, and 9 of Part IV-A, attach a list showing the name of and amount received from each "disqualified person." (For a definition of "disqualified person," see Specific Instructions, Part II, Line 4d, on page 3.)
- b For each of the years included on line 9 of Part IV-A, attach a list showing the name of and amount received from each payer (other than a "disqualified person") whose payments to the organization were more than \$5,000. For this purpose, "payer" includes, but is not limited to, any organization described in sections 170(b)(1)(A)(i) through (vi) and any governmental agency or bureau.
- 
- 14 Indicate if your organization is one of the following. If so, complete the required schedule. (Submit only those schedules that apply to your organization. Do not submit blank schedules.)
- |  | Yes | No | If "Yes,"<br>complete<br>Schedule: |
|--|-----|----|------------------------------------|
| Is the organization a church? .....  |     |    | A                                  |
| Is the organization, or any part of it, a school? .....  | X   |    | B                                  |
| Is the organization, or any part of it, a hospital or medical research organization? .....                 |     |    | C                                  |
| Is the organization a section 509(a)(3) supporting organization? .....                                     |     |    | D                                  |
| Is the organization a private operating foundation? .....  |     |    | E                                  |
| Is the organization, or any part of it, a home for the aged or handicapped? .....                          |     |    | F                                  |
| Is the organization, or any part of it, a child care organization? .....                                   |     |    | G                                  |
| Does the organization provide or administer any scholarship benefits, student aid, etc.? .....             |     |    | H                                  |
| Has the organization taken over, or will it take over, the facilities of a "for profit" institution? ..... |     |    | I                                  |

**Part IV Financial Data**

Complete the financial statements for the current year and for each of the 3 years immediately before it. If in existence less than 4 years, complete the statements for each year in existence. If in existence less than 1 year, also provide proposed budgets for the 2 years following the current year.

**A. Statement of Revenue and Expenses**

	Current tax year	3 prior tax years or proposed budget for 2 years			(e) TOTAL
	(a) From _____ to _____	(b) _____	(c) _____	(d) _____	
<b>Revenue</b>					
1 Gifts, grants, and contributions received (not including unusual grants — see page 6 of the instructions) . . . . .					
2 Membership fees received . . . . .					
3 Gross investment income (see instructions for definition) . . . . .					
4 Net income from organization's unrelated business activities not included on line 3 . . . . .					
5 Tax revenues levied for and either paid to or spent on behalf of the organization . . . . .					
6 Value of services or facilities furnished by a governmental unit to the organization without charge (not including the value of services or facilities generally furnished the public without charge) . . . . .					
7 Other income (not including gain or loss from sale of capital assets) (attach schedule) . . . . .					
8 Total (add lines 1 through 7) . . . . .					
9 Gross receipts from admissions, sales of merchandise or services, or furnishing of facilities in any activity that is not an unrelated business within the meaning of section 513. Include related cost of sales on line 22 . . . . .					
10 Total (add lines 8 and 9) . . . . .					
11 Gain or loss from sale of capital assets (attach schedule) . . . . .					
12 Unusual grants . . . . .					
13 Total revenue (add lines 10 through 12) . . . . .					
<b>Expenses</b>					
14 Fundraising expenses . . . . .					
15 Contributions, gifts, grants, and similar amounts paid (attach schedule) . . . . .					
16 Disbursements to or for benefit of members (attach schedule) . . . . .					
17 Compensation of officers, directors, and trustees (attach schedule) . . . . .					
18 Other salaries and wages . . . . .					
19 Interest . . . . .					
20 Occupancy (rent, utilities, etc.) . . . . .					
21 Depreciation and depletion . . . . .					
22 Other (attach schedule) . . . . .					
23 Total expenses (add lines 14 through 22) . . . . .					
24 Excess of revenue over expenses (line 13 minus line 23) . . . . .					



**Part IV** Financial Data (Continued)**B. Balance Sheet (at the end of the period shown)**Current tax year  
Date \_\_\_\_\_**Assets**

1	Cash .....	1	
2	Accounts receivable, net .....	2	
3	Inventories .....	3	
4	Bonds and notes receivable (attach schedule) .....	4	
5	Corporate stocks (attach schedule) .....	5	
6	Mortgage loans (attach schedule) .....	6	
7	Other investments (attach schedule) .....	7	
8	Depreciable and depletable assets (attach schedule) .....	8	
9	Land .....	9	
10	Other assets (attach schedule) .....	10	
11	<b>Total assets</b> (add lines 1 through 10) .....	11	

**Liabilities**

12	Accounts payable .....	12	
13	Contributions, gifts, grants, etc., payable .....	13	
14	Mortgages and notes payable (attach schedule) .....	14	
15	Other liabilities (attach schedule) .....	15	
16	<b>Total liabilities</b> (add lines 12 through 15) .....	16	

**Fund Balances or Net Assets**

17	<b>Total fund balances or net assets</b> .....	17	
18	<b>Total liabilities and fund balances or net assets</b> (add line 16 and line 17) .....	18	

If there has been any substantial change in any aspect of the organization's financial activities since the end of the period shown above, check the box and attach a detailed explanation. ☐

**Schedule B. Schools, Colleges, and Universities**

- 1 Does, or will, the organization normally have: (a) a regularly scheduled curriculum, (b) a regular faculty of qualified teachers, (c) a regularly enrolled student body, and (d) facilities where its educational activities are regularly carried on? ☒ Yes ☐ No  
If "No," do not complete the rest of Schedule B.

- 2 Is the organization an instrumentality of a state or political subdivision of a state? ☐ Yes ☒ No  
If "Yes," document this in Part II and do not complete items 3 through 10 of Schedule B. (See instructions on the back of Schedule B.)

- 3 Does or will the organization (or any department or division within it) discriminate in any way on the basis of race with respect to:
- a Admissions? ☐ Yes ☒ No
- b Use of facilities or exercise of student privileges? ☐ Yes ☒ No
- c Faculty or administrative staff? ☐ Yes ☒ No
- d Scholarship or loan programs? ☐ Yes ☒ No
- If "Yes" for any of the above, explain.

- 4 Does the organization include a statement in its charter, bylaws, or other governing instrument, or in a resolution of its governing body, that it has a racially nondiscriminatory policy as to students? ☒ Yes ☐ No

Attach whatever corporate resolutions or other official statements the organization has made on this subject.

- 5a Has the organization made its racially nondiscriminatory policies known in a manner that brings the policies to the attention of all segments of the general community that it serves? ☐ Yes ☒ No

No, the organization is currently being formed as are the policies

If "Yes," describe how these policies have been publicized and how often relevant notices or announcements have been made. If no newspaper or broadcast media notices have been used, explain.

- b If applicable, attach clippings of any relevant newspaper notices or advertising, or copies of tapes or scripts used for media broadcasts. Also attach copies of brochures and catalogs dealing with student admissions, programs, and scholarships, as well as representative copies of all written advertising used as a means of informing prospective students of the organization's programs.

- 6 Attach a numerical schedule showing the racial composition, as of the current academic year, and projected to the extent feasible for the next academic year, of: (a) the student body, and (b) the faculty and administrative staff. See Attached

- 7 Attach a list showing the amount of any scholarship and loan funds awarded to students enrolled and the racial composition of the students who have received the awards. N/A

- 8a Attach a list of the organization's incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations. See Part 2, Question 4

- b State whether any of the organizations listed in 8a have as an objective the maintenance of segregated public or private school education, and, if so, whether any of the individuals listed in 8a are officers or active members of such organizations.

- 9a Enter the public school district and county in which the organization is located.

Donna Independent School District, Hidalgo County, Texas

- b Was the organization formed or substantially expanded at the time of public school desegregation in the above district or county? ☐ Yes ☒ No

- 10 Has the organization ever been determined by a state or Federal administrative agency or judicial body to be racially discriminatory? ☐ Yes ☒ No

If "Yes," attach a detailed explanation identifying the parties to the suit, the forum in which the case was heard, the cause of action, the holding in the case, and the citations (if any) for the case. Also describe in detail what changes in the organization's operation, if any, have occurred since then.

For more information, see back of Schedule B.

Form **8718**(Rev. January 1998)  
Department of the Treasury  
Internal Revenue Service**User Fee for Exempt Organization  
Determination Letter Request**▶ **Attach this form to determination letter application.**  
(Form 8718 is NOT a determination letter application.)**APPLICATION**  
For IRS Use OnlyControl number \_\_\_\_\_  
Amount paid \_\_\_\_\_  
User fee screener \_\_\_\_\_**1** Name of organization \_\_\_\_\_**2** Employer Identification Number \_\_\_\_\_**Caution:** Do not attach Form 8718 to an application for a pension plan determination letter. Use Form 8717 instead.**3 Type of request****Fee**

- a** ☐ Initial request for a determination letter for:
- An exempt organization that has had annual gross receipts averaging not more than \$10,000 during the preceding 4 years, or
  - A new organization that anticipates gross receipts averaging not more than \$10,000 during its first 4 years . . . ▶ **\$150**
- Note:** If you checked box 3a, you must complete the Certification below.

**Certification**

I certify that the annual gross receipts of \_\_\_\_\_  
name of organization  
 have averaged (or are expected to average) not more than \$10,000 during the preceding 4 (or the first 4) years of operation.

Signature ▶ \_\_\_\_\_

Title ▶ \_\_\_\_\_

- b** ☒ Initial request for a determination letter for:
- An exempt organization that has had annual gross receipts averaging more than \$10,000 during the preceding 4 years, or
  - A new organization that anticipates gross receipts averaging more than \$10,000 during its first 4 years . . . . . ▶ **\$500**
- c** ☐ Group exemption letters . . . . . ▶ **\$500**

**Instructions**

The law requires payment of a user fee with each application for a determination letter. The user fees are listed on line 3 above. For more information, see Rev. Proc. 98-8, 1998-1, I.R.B. 225.

Check the box on line 3 for the type of application you are submitting. If you check box 3a, you must complete and sign the certification statement that appears under line 3a.

Attach to Form 8718 a check or money order payable to the Internal Revenue Service for the full amount of the user fee. If you do not include the full amount, your application will be returned. Attach Form 8718 to your determination letter application.

Send the determination letter application and Form 8718 to:

Internal Revenue Service  
P.O. Box 192  
Covington, KY 41012-0192

If you are using express mail or a delivery service, send the application and Form 8718 to:

Internal Revenue Service  
201 West Rivercenter Blvd.  
Attn: Extracting Stop 312  
Covington, KY 41011

Attach Check or Money Order Here

## Part II.

1. The community of Donna, TX is located in the Rio Grande Valley on the U.S.- Mexico border. The community is ravaged by gangs and crime, and is served by an educational system in drastic need of reform. It was in this community that three teachers began their careers several years ago. At the end of their first year of teaching, they felt that the traditional framework for public education simply was not doing enough for their students, nearly all of whom were minorities from economically disadvantaged *colonias* (subdivisions often lacking in water and other basic utilities). It was clear to these teachers that a better approach to education was necessary, and, at the end of their first year of teaching, they resolved to make a change. With the permission and funding of the local school district, these teachers designed and implemented a program aimed at raising their students' achievement to a level comparable to students from the best schools in the nation. The program was named the IDEA Academy (Individuals Dedicated to Excellence and Achievement).

The premise behind the IDEA Academy is simple: if students are to read and write better and develop improved math skills, they need to attend school longer, take more challenging courses, and work harder. This commitment to hard work is matched by strict codes for student discipline and conduct. Students, parents, and teachers decide to make an enormous commitment when they register for the IDEA Academy. All IDEA Academy students choose to attend school from 7:30 a.m. until 5:00 p.m. during the week and from 9:00 a.m. until 1:00 p.m. on Saturday. IDEA Academy students choose to spend 40% more time in school than any other students in the Rio Grande Valley.

By the end of the first year, the results of the hard work began to show. Passing rates for TAAS Math increased from 70% before entering the IDEA Academy to over 95% after just one year. Reading scores also soared from a 69% passing rate to 86%. Furthermore, students came to appreciate the "tough love" approach to education where they were engaged in an exciting educational curriculum that challenged them each day.

After the success of the first year, demand for the program swelled to 104 students for the 1999-2000 school year and students, teachers, and parents began to seek greater autonomy from the school district and requested that the program be expanded to serve sixth and seventh grade students. When these demands weren't met, a collaborative decision was made to apply for state charter status so that the educational journey these students and teachers began could be continued.

With this quest comes the need to establish non-profit status from the I.R.S. When granted this status and after signing a charter school agreement with the state, the IDEA Academy will become an independent public school responsible for educating, providing transportation, facilities, and food services to all students who wish to attend.

2. The Texas Education Agency, United States Federal Government (Departments of Agriculture and Education), and potential private foundations and donors.
3. The IDEA Academy, Inc. will raise money by soliciting private business entities and individuals through selective mailings and personal contacts. A fundraising committee will be formed with the express purpose of organizing volunteers for fundraising efforts. Finally, the organization will authorize the IDEA Academy, Inc. President and School Director to apply for grants from federal and state agencies as well as private foundations.
7. IDEA Academy Inc. is accountable to the Texas Education Agency and the Texas State Board of Education. In our charter agreement with the State Board of Education, it is clearly stated that the Board of Directors of IDEA, Inc. are ultimately accountable to TEA and the SBOE for the school's financial dealings and academic success. In addition, we are required to open our financial records to an independent auditor at the conclusion of the fiscal year.
8. Currently IDEA Academy, Inc. holds no assets. However, after state charter status is granted we will receive funding to purchase necessary school equipment and supplies such as: desks, chairs, supplies, computers, and other equipment necessary for a school to operate.
- 12b. Yes, only students residing in the Rio Grande Valley who register for the IDEA Academy and sign the IDEA contract (Appendix A1) will be offered admittance into the IDEA Academy. All students have an equal opportunity to matriculate and there are no academic criteria for admittance.

#### Schedule B

- 5a. The IDEA Academy, in all mailings and communications with prospective students, clearly states its nondiscriminatory policy towards admitting and educating students.
6. The Racial Composition of the IDEA Academy, which closely reflects that of the communities we serve, is as follows:  
Hispanic/Latino: 99%  
African-American: 1%

#### Projected Racial Composition of students:

Hispanic/Latino: 93%  
European-American: 5%  
African-American: 2%

#### Racial Composition of Teaching Staff:

Hispanic/Latino: 25%  
European-American: 75%

**Projected Racial Composition of Faculty and Staff:**

Hispanic/Latino: 50%  
European-American: 40%  
Other: 10%

# The I.D.E.A. Commitment to Excellence and Achievement APPLICATION

## Student Contract

I, \_\_\_\_\_, commit myself to the IDEA Academy and I pledge that:

1. I will devote myself to learning; I will raise my hand and ask questions in class if I do not understand something.
2. I will attend school Monday through Thursday from 7:30 A.M. to 5:00 P.M., Friday from 7:30 A.M. until 3:00 P.M., and on Saturdays from 9:00 A.M. until 1:00 P.M.
3. I will put forth my best effort in all the work that I do. That means I will complete all my assigned homework every night and I will call my teacher if I have a problem with my homework or if I will be unable to attend school.
4. I will follow the dress code and behave in a way acceptable for students of the IDEA Academy. I will respect my teachers, I will respect my IDEA classmates, and, above all, I will respect myself.

*Failure to adhere to these commitments can cause me to lose IDEA privileges and can lead to my removal from the program.*

Student Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Parent/Guardian Contract

As Parents/Guardians who want our child to succeed, we pledge that:

1. We will devote ourselves to supporting our child in school, and encourage our child to put forth his/her best effort in all the work that he/she does. This means that we will check his/her homework, sign reading logs, and, if possible, let our child call the teacher when he/she needs help.
2. We will ensure that our child is at school Monday through Thursday from 7:30 A.M. to 5:00 P.M., Friday from 7:30 A.M. to 3:00 P.M., and on Saturdays from 9 A.M. until 1:00 P.M.
3. We will allow our child to attend all IDEA field trips.
4. We will contact our child's teacher whenever we have any questions, concerns, or comments about our child's education.
5. We understand that our child needs to follow IDEA rules so that teachers can teach and students can learn. We are responsible for the behavior and actions of our child.

*Failure to adhere to these commitments can cause my child to lose various IDEA privileges and can lead to expulsion from the program.*

Parent/Guardian Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Teacher Contract

As teachers who believe in our students and want them to succeed, we pledge that:

1. We will devote ourselves to our students' learning and encourage our students to put forth their best effort in all the work that they do.
2. We will attend school Monday through Thursday from 7:30 A.M. to 5:00 P.M., Friday from 7:30 A.M. to 3:00 P.M., and on Saturdays from 9 A.M. until 1:00 P.M., and whenever else our students need us.
3. We will prepare ourselves for the school day by making sure we teach in the best way we know how. We will do everything we can to help our students succeed.
4. We will be available to our students and their parents whenever they may need us.

*Failure to adhere to these commitments can lead to our removal from the IDEA Academy.*

Teacher Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Teacher Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Teacher Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Teacher Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Compromiso con I.D.E.A. para Excelencia y Aprendizaje APPLICATION

### Contrato del Estudiante

Yo, \_\_\_\_\_, me comprometo con la Academia I.D.E.A. y prometo que:

1. Me dedicare a aprender. Levantaré mi mano cuando quiera una respuesta para mis preguntas en la clase si no entiendo algo.
2. Asistiré en la escuela de lunes a viernes de las 7:30 A.M. a las 5:00 P.M. y los sábados de las 9:00 A.M. a la 1:00 P.M.
3. Haré mi mas grande esfuerzo en todo el trabajo que haga. Esto quiere decir, que terminaré mis tareas y llamaré a mi maestro(a) en caso de que tenga algun problema, no entienda o no pueda asistir a la escuela.
4. Respetaré las normas de vestir y me portaré de una manera aceptable para mis maestros y compañeros y sobre todo, me respetaré a mi mismo.

*Fracasar con este compromiso, causará que pierda los privilegios de I.D.E.A. y también mi expulsion del programa.*

Firma del Estudiante \_\_\_\_\_

Fecha \_\_\_\_\_

### Contrato del Padre o Tutor

Yo como padre quiero que mi hijo(a) tenga éxito, me comprometo a:

1. Dedicarnos a apoyar a nuestro hijo(a) para que ponga todo de su parte y haga su mayor esfuerzo en todo el trabajo que haga. Esto quiere decir, que revisaremos tareas, firmaremos los records de lectura y si es posible dejar que llame a sus maestros cuando necesite ayuda.
2. Nos aseguraremos de que nuestro hijo(a) esté en la escuela de 7:30 A.M. hasta las 5:00 P.M. y los sabados de 9:00 A.M. hasta la 1:00 P.M.
3. Le permitiremos asistir a los paseos de I.D.E.A.
4. Llamaremos a su maestra(o) cada vez que tengamos preguntas, dudas ó simplemente comentarios sobre los estudios de nuestro hijo(a).
5. Entendemos que nuestro niño necesita seguir los reglamentos de I.D.E.A. para que los maestros puedan enseñar y los estudiantes aprender.

*Fracasar en uno de estos compromisos, puede causar que mi hijo pierda varios privilegios de I.D.E.A. o su expulsión del programa.*

Firma del Padre o Tutor \_\_\_\_\_

Fecha \_\_\_\_\_

### Contrato del Maestro:

Como maestros que creen en sus alumnos y quieren que tengan éxito, nos comprometemos a:

1. Nos dedicaremos al aprendizaje de nuestros estudiantes.
2. Asistiremos a la escuela de Lunes a Viernes de 7:30 A.M. a las 5:00 P.M. y los sabados de 9:00 A.M. a 1:00 P.M. y cada vez que nos necesiten nuestros estudiantes.
3. Nos prepararemos para nuestros dias de escuela asegurandonos que enseñaremos en la mejor manera que podamos. Haremos cualquier cosa que podamos para ayudar a nuestros estudiantes a tener éxito en sus clases. Estaremos al alcance de nuestros estudiantes y sus padres, cada vez que nos necesiten.

*No cumplir con uno de estos compromisos puede resultar en la expulsión de la Academia I.D.E.A.*

Firma del Maestro \_\_\_\_\_

Fecha \_\_\_\_\_

Firma del Maestro \_\_\_\_\_

Fecha \_\_\_\_\_

Firma del Maestro \_\_\_\_\_

Fecha \_\_\_\_\_

Firma del Maestro \_\_\_\_\_

Fecha \_\_\_\_\_



**Appendix V**

**Biographical Affidavit Form**

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: IDEA Academy, Inc. IDEA Academy

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Thomas Edward Torkelson
2. Have you ever had your name changed? No If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: [REDACTED], Toledo, OH

5. Business Address: 703 Thornwood, Mission, TX 78572  
Business Telephone: (956) 638-4332

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1999-present	703 Thornwood, Mission, TX	Mission, TX	78572
1997-1999	4820 N. Main St.	McAllen, TX	78501
1993-1997	2204 Walnut Way	Noblesville, IN	
1982-92	11050 Centerville, ST	Whitehouse, OH	43571

7. Education: Dates, Names, Locations and Degrees

College Class of 1997, Georgetown University, Washington, DC  
B.A. Economics  
Graduate Studies \_\_\_\_\_

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? Yes

If yes, give details: I will be the IDEA Academy School Director

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member; key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? No. If so, please furnish details: \_\_\_\_\_

Dated and signed this 19th day of January, 19 2000, at \_\_\_\_\_

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.

Thomas E. Tackelson  
(Signature of Affiant)

Thomas E. Tackelson

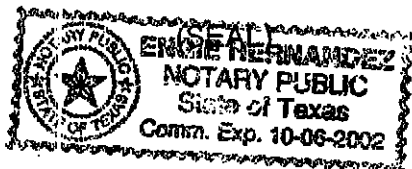
State of Texas  
County of Hidalgo

Personally appeared before me the above named Thomas E. Tackelson personally known to me, who, being duly sworn, deposes and says 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 19th day of January, 19 2000

Engel Hernandez  
(Notary Public)

My commission expires 10/06/2006



**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: \_\_\_\_\_

TL IDEP ACADEMY INCORPORATED; THE IDEA ACADEMY

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Daniel Joseph Black

2. Have you ever had your name changed? No If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: White Plains NY 05-27-77

5. Business Address: \_\_\_\_\_

Business Telephone: \_\_\_\_\_

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1980-95	912 Old Country Road	Elmsford NY	10523
95-99	P.O. Box 0699-Station B	Nashville TN	37235
99-Present	216 S. Louisiana Street	Weslaco TX	78596

7. Education: Dates, Names, Locations and Degrees

College Vanderbilt University - (1995-99) Nashville TN  
B.S. in English

Graduate Studies \_\_\_\_\_

Others \_\_\_\_\_

8. List Membership in Professional Societies and Associations: \_\_\_\_\_

9. Present or Proposed Position with the Proposed Charter School:
- President of IDEA Academy, Inc. and School Director of IDEA Academy

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1997-Present	Donna ISD	116 N. 10 <sup>th</sup> St. Donna, TX	Teacher, Director of IDEA Academy
1999	Teach for America	315 West 36 <sup>th</sup> St. 6 <sup>th</sup> floor NY, NY 10018	School Director

11. Present employer may be contacted:
- ☒
- Yes
- ☐
- No (Circle One)

Former employers may be contacted: ☒ Yes ☐ No (Circle One)

12. a Have you ever been in a position which required a fidelity bond?
- No
- 
- If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? No  
If yes, give details: \_\_\_\_\_

13. 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):
- Probationary Teaching Certificate, issued 1997

14. During the last ten (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?
- No
- If yes, give details: \_\_\_\_\_

APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? No  
If yes, give details: \_\_\_\_\_

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No  
If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? No. If so, please furnish details: \_\_\_\_\_

Dated and signed this 19 day of January, 2000, at Garza Elementary School

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.

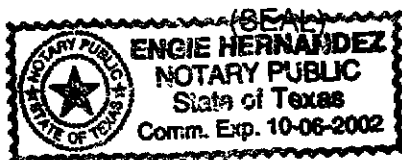
[Signature]  
(Signature of Affiant)

State of Texas  
County of Hidalgo

Personally appeared before me the above named Daniel Black personally known to me, who, being duly sworn, deposes and says 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 19th day of January, 19 2000

Engel Hernandez  
(Notary Public)  
My commission expires 10/06/2002



**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

i) Name of Sponsoring Entity and Name of Proposed Charter School: \_\_\_\_\_

IDEA Academy Inc., IDEA ACADEMY

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Thelma Marie Balli
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) Flores

c. Other names used at any time —

3. Social Security Number\*: [REDACTED]
4. Date and Place of Birth: [REDACTED] Pharr, Texas
5. Business Address: 116 N. 10<sup>th</sup> St.  
Business Telephone: 956-464-1834 Ext. #147
6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1976-present	15072206 physical: 302 S. 13 <sup>th</sup> St.	Akmo, Texas	78516

7. Education: Dates, Names, Locations and Degrees

College Pan American University - Edinburg, Texas  
B.S. - Education 1976  
Graduate Studies Texas A & I - Kingsville, Texas Masters/Education  
1982

## APPLICATION

Others Certification : 1. Special Education  
 2. E.S.L. 3. Midmanagement

8. List Membership in Professional Societies and Associations: U.T.-P.A.U. Alumni Association, Board Member 2 Teach For America, Board Member  
Texas Council of Administrators of Special Education

9. Present or Proposed Position with the Proposed Charter School : \_\_\_\_\_

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1992-present	Donna T.S.D.		Elem Supervisor Sp. Ed. Elem. Principal 5 yrs Asst. Principal Middle School 2 Migrant Specialists 2 1/2 months
1986-1992	P.S.J.A. T.S.D.		Austin Jr. High - Teacher, Sp. Ed.
1977-1983			P.S.J.A. High school E.S.L. Teacher

11. Present employer may be contacted: ☒ Yes ☐ No (Circle One)

Former employers may be contacted: ☒ Yes ☐ No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? NO  
 If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? NO  
 If yes, give details: \_\_\_\_\_

13. 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) T.E.A. - Teaching Certificates in  
Elem. Ed., Sp. Ed., E.S.L., Midmanagement

14. During the last ten (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? NO If yes, give details: \_\_\_\_\_



# APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? No  
If yes, give details: \_\_\_\_\_

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No  
If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? yes. If so, please furnish details: Pending appeal in a personal injury case - 1981 - Plaintiff

Dated and signed this 19 day of January, 192000, at \_\_\_\_\_

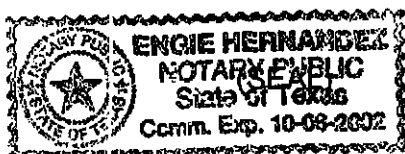
I hereby certify under penalty of perjury that I am acting on my own behalf, and that the foregoing statements are true and correct to the best of my knowledge and belief.

Kelma M. Ball  
(Signature of Affiant)

State of Texas  
County of Hidalgo

Personally appeared before me the above named \_\_\_\_\_ personally known to me, who, being duly sworn, deposes and says 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 19th day of January, 192000



Engie Hernandez  
(Notary Public)  
My commission expires 10/08/2002

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: THE IDEA  
ACADEMY INCORPORATED; THE IDEA ACADEMY

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): TRACY RENE EPP
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: [REDACTED]
4. Date and Place of Birth: [REDACTED] ST. MARY'S COUNTY, MARYLAND
5. Business Address: 3700 N. 10<sup>th</sup> St. Suite 303 McAllen TX 78501  
Business Telephone: 956 630 6781
6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
06/99-Present	800 S. I Rd	Pharr TX	78577
06/99-06/98	318 Hidden Valley	Weslaco TX	78596
06/98-06/97	1604 Orange	Weslaco TX	78596
06/97-06/90	17238 Round Hill Rd	King GEORGE VA	22485

7. Education: Dates, Names, Locations and Degrees

College Case Western Reserve University, Cleveland, OH,  
B. A. History/ Political Science

Graduate Studies \_\_\_\_\_

Others Teacher Certification through Alternative Certification Program

8. List Membership in Professional Societies and Associations: \_\_\_\_\_

Texas Council for Social Studies  
Educational Leadership

9. Present or Proposed Position with the Proposed Charter School: \_\_\_\_\_

Member of Incorporating group and Board of Directors

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
06/99-Present	Teach For America	3700 N. 10 <sup>th</sup> St. McAllen Tx 78501	Program Director
06/99-06/97	Weslaco I.S.D.	1201 S. Bridge Weslaco Tx 78596	Teacher
06/97-06/93	Student	BWRU	

11. Present employer may be contacted: Yes No (Circle One)

Former employers may be contacted: Yes No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? NO

If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? NO

If yes, give details: \_\_\_\_\_

13. 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):

Texas State Teaching Certificate

14. During the last ten (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? NO If yes, give details: \_\_\_\_\_

# APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? \_\_\_\_\_

If yes, give details: NO

16. Have you ever been adjudged bankrupt? NO

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? NO

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? NO

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? NO. If so, please furnish details: \_\_\_\_\_

Dated and signed this 19<sup>th</sup> day of January, 2000, at McAllen, Texas

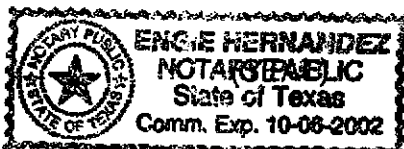
I hereby certify under penalty of perjury that I am acting on my own behalf, and that the foregoing statements are true and correct to the best of my knowledge and belief.

Tracy Ego  
(Signature of Affiant)

State of Texas  
County of Hidalgo

Personally appeared before me the above named Tracy Ego personally known to me, who, being duly sworn, deposes and says 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 19<sup>th</sup> day of January, 19- 2000



Engie Hernandez  
(Notary Public)  
My commission expires 10/06/2002

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: IDEA Academy, Inc., IDEA Academy

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Daniel Hernandez
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) N/A  
c. Other names used at any time N/A

3. Social Security Number\*: [REDACTED]
4. Date and Place of Birth: [REDACTED] Edcouch, Tx
5. Business Address: 116 North 10th St. Donna, Tx 78537  
Business Telephone: (956) 464-1310

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1978-Present	P.O. Box 1081	Edcouch, Tx	78543

7. Education: Dates, Names, Locations and Degrees

College Pan American College B.A. 1960  
Edinburg, Tx.

Graduate Studies Texas A&I University, Kingsville, Tx M.S.

Others N/A

8. List Membership in Professional Societies and Associations: TASA - Texas Association of School Administrators (Life)

9. Present or Proposed Position with the Proposed Charter School: Board Member

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1994-Present	Donna I.S.D.	116 W. 10 St. Donna, Tx	Curriculum Specialist
1997-1994	Edcouch-Edinburg I.S.D.	Edcouch, Tx	Superintendent
1970-1977	LaVilla T.S.D.	LaVilla, Tx	Superintendent

11. Present employer may be contacted: Yes No (Circle One)

Former employers may be contacted: Yes No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? No  
If any claims were made on the bond, give details: N/A

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? No  
If yes, give details: N/A

13. 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): Professional Administrator (Life)

14. During the last ten (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? No If yes, give details: N/A

APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? NO

If yes, give details: N/A

16. Have you ever been adjudged bankrupt? NO

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? NO

If yes, give details: N/A

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? NO

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? NO If so, please furnish details: N/A

Dated and signed this 19<sup>th</sup> day of January, 2000, at \_\_\_\_\_

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.

Daniel Hernandez  
(Signature of Affiant)

State of Texas

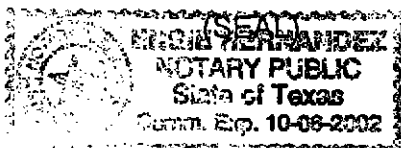
County of Hidalgo

Personally appeared before me the above named Daniel Hernandez personally known to me, who, being duly sworn, deposes and says 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 19<sup>th</sup> day of January, 2000

Enrique Hernandez  
(Notary Public)

My commission expires 10/06/2002



**Appendix V**

**Biographical Affidavit Form**



**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
 (Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: \_\_\_\_\_

TL IDEP ACADEMY INCORPORATED; THE IDEA ACADEMY

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Daniel Joseph Black

2. Have you ever had your name changed? No If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: White Plains NY [REDACTED]

5. Business Address: \_\_\_\_\_

Business Telephone: \_\_\_\_\_

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1990-95	912 Old Country Road	Elmsford NY	10523
95-99	P.O. Box 0699 - Station B	Nashville TN	37235
99-Present	716 S. Louisiana Street	Weslaco TX	78596

7. Education: Dates, Names, Locations and Degrees

College Vanderbilt University - (1995-99) Nashville TN  
B.S. in English

Graduate Studies \_\_\_\_\_

Others \_\_\_\_\_

8. List Membership in Professional Societies and Associations: None

9. Present or Proposed Position with the Proposed Charter School : Teacher

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
Aug 99 - Present	Donna I.S.D.		5th Grade Bilingual Teacher
June 98 - Aug 98	The Gardener's Gardener		Land Saper

11. Present employer may be contacted: Yes No (Circle One)

Former employers may be contacted: Yes No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? No

If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? \_\_\_\_\_

If yes, give details: \_\_\_\_\_

13. 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): \_\_\_\_\_

14. During the last ten (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? No If yes, give details: \_\_\_\_\_

# APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? No

If yes, give details: \_\_\_\_\_

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? No. If so, please furnish details: \_\_\_\_\_

Dated and signed this 19 day of January

2000, at Gazza Elementary School

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)

State of Texas

County of Hidalgo

Personally appeared before me the above named Daniel Black personally known to me, who, being duly sworn, deposes and says 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.

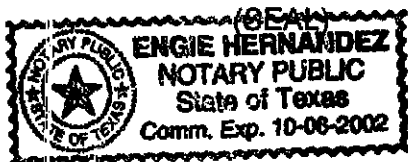
Subscribed and sworn to before me this 19th day of

January

2000

(Notary Public)

My commission expires 10/06/2002



**Appendix V**

**Biographical Affidavit Form**

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: IDEA Academy, Inc., IDEA Academy

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Thomas Edward Torkelson
2. Have you ever had your name changed? No If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: [REDACTED], Toledo, OH

5. Business Address: 703 Thornwood, Mission, TX 78572  
Business Telephone: (956) 638-4332

6. List your residences for the last ten (10) years starting with your current address, giving:

	<u>DATES</u>	<u>ADDRESS</u>	<u>CITY AND STATE</u>	<u>ZIP CODE</u>
1999-present	703 Thornwood	Mission, TX 78572	Mission, TX	78572
1997-1999	4820 N. Main St.	McAllen, TX	McAllen, TX	78501
	1993-1997	2204 Walnut Way	Noblesville, IN	
	1989-92	11050 Centerville, ST	Whitehouse, OH	43571

7. Education: Dates, Names, Locations and Degrees

College Class of 1997, Georgetown University, Washington, DC  
B.A. Economics  
Graduate Studies \_\_\_\_\_

# APPLICATION

Others \_\_\_\_\_

8. List Membership in Professional Societies and Associations: \_\_\_\_\_

9. Present or Proposed Position with the Proposed Charter School: President of IDEA Academy, Inc. and School Director of IDEA Academy

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1997-Present	Donna ISD	116 N. 10th St. Donna, TX	Teacher, Director of IDEA Academy
1999	Teach for America	315 West 36th St. 6th floor NY, NY 10018	School Director

11. Present employer may be contacted: ☒ Yes ☐ No (Circle One)

Former employers may be contacted: ☒ Yes ☐ No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? No  
If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? No  
If yes, give details: \_\_\_\_\_

13. 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): Probationary Teaching Certificate, issued 1997

14. During the last ten (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? No If yes, give details: \_\_\_\_\_

APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? Yes

If yes, give details: I will be the IDEA Academy School Director

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? No. If so, please furnish details: \_\_\_\_\_

Dated and signed this 19<sup>th</sup> day of January, 2000, at \_\_\_\_\_

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.

Thomas E. Tackelson  
(Signature of Affiant)

Thomas E. Tackelson

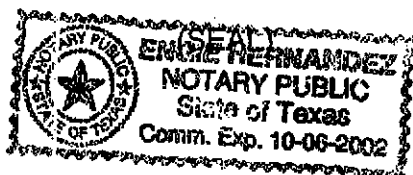
State of Texas  
County of Hidalgo

Personally appeared before me the above named Thomas E. Tackelson personally known to me, who, being duly sworn, deposes and says 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 19<sup>th</sup> day of January, 2000

Enrique Hernandez  
(Notary Public)

My commission expires 10/06/2002



**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

II Name of Sponsoring Entity and Name of Proposed Charter School: \_\_\_\_\_

IDEA Academy Inc., IDEA ACADEMY

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Thelma Marie Balli'
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) Flores

c. Other names used at any time —

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: [REDACTED]

Pharr, Texas

5. Business Address: 116 W. 10<sup>th</sup> St.

Business Telephone: 956-464-1834 Ext. #147

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1976-present	15072206 physical: 302 S. 12 <sup>th</sup> St.	Akmo, Texas	78516

7. Education: Dates, Names, Locations and Degrees

College Pan American University - Edinburg, Texas

B.S. - Education 1976

Graduate Studies Texas A.P.T. - Kingsville, Texas Masters/education  
1982



Others Certification : 1. Special Education  
2. E.S.L. 3. Midmanagement

8. List Membership in Professional Societies and Associations: U.T.-P.A.U. Alumni Association, Board Member 2. Teach For America, Board Member  
Texas Council of Administrators of Special Education

9. Present or Proposed Position with the Proposed Charter School : \_\_\_\_\_

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1992-present	DDNA T.S.D.		Elem Supervisor Sp. Ed. Elem Principal 5 yrs Asst. Principal Middle School Migrant Specialists 2 1/2 months
1986-1992	P.S.J.A. T.S.D.		Austin Jr. High - Teacher, Sp. Ed.
1977-1983			P.S.J.A. High School Teacher E.S.L.

11. Present employer may be contacted: ☒ Yes ☐ No (Circle One)

Former employers may be contacted: ☒ Yes ☐ No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? NO  
 If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? NO  
 If yes, give details: \_\_\_\_\_

13. 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) T.E.A. - Teaching Certificates in  
Elem. Ed., Sp. Ed., E.S.L., Midmanagement

14. During the last ten (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? NO If yes, give details: \_\_\_\_\_

# APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? No

If yes, give details: \_\_\_\_\_

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? yes If so, please furnish details: Pending appeal in a personal injury case - 1981 - Plaintiff

Dated and signed this 19 day of January, 19 2000, at \_\_\_\_\_

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.

Rebecca M. Ball  
(Signature of Affiant)

State of Texas  
County of Hidalgo

Personally appeared before me the above named \_\_\_\_\_ personally known to me, who, being duly sworn, deposes and says 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 19th day of January, 19 2000



Engie Hernandez  
(Notary Public)

My commission expires 10/08/2002

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: The IDEA  
ACADEMY INCORPORATED; THE IDEA ACADEMY

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): TRACY RENEE EPP
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) \_\_\_\_\_

c. Other names used at any time \_\_\_\_\_

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: [REDACTED] ST. MARY'S COUNTY, MARYLAND

5. Business Address: 3700 N. 10<sup>th</sup> St. Suite 303 McAllen TX 78501  
Business Telephone: 956 630 6781

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
06/99-Present	800 S. I Rd	Pharr TX	78577
06/99-06/98	318 Hidden Valley	Weslaco TX	78596
06/98-06/97	1604 Orange	Weslaco TX	78596
06/97-06/90	17238 Round Hill Rd	King GEORGE VA	22485

7. Education: Dates, Names, Locations and Degrees

College Case Western Reserve University, Cleveland, OH,  
B. A. History/ Political Science  
Graduate Studies \_\_\_\_\_

## APPLICATION

Others Teacher Certification through Alternative Certification Program.

8. List Membership in Professional Societies and Associations: \_\_\_\_\_

Texas Council for Social Studies

Educational Leadership

9. Present or Proposed Position with the Proposed Charter School: \_\_\_\_\_

Member of Incorporating group and Board of Directors

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
06/99-Present	Teach For America	3700 N. 10 <sup>th</sup> St. McAllen Tx 78501	Program Director
06/99-06/97	Weslaco I.S.D.	1201 S. Bridge Weslaco Tx 78596	Teacher
06/97-06/93	Student	BWRU	

11. Present employer may be contacted: Yes No (Circle One)

Former employers may be contacted: Yes No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? NO

If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? NO

If yes, give details: \_\_\_\_\_

13. 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):

Texas State Teaching Certificate

14. During the last ten (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? NO If yes, give details: \_\_\_\_\_

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? \_\_\_\_\_

If yes, give details: NO

16. Have you ever been adjudged bankrupt? NO

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? NO

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? NO

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? NO. If so, please furnish details: \_\_\_\_\_

Dated and signed this 19<sup>th</sup> day of January, 192000, at McAllen, Texas

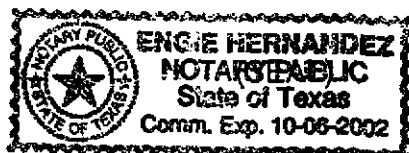
I hereby certify under penalty of perjury that I am acting on my own behalf, and that the foregoing statements are true and correct to the best of my knowledge and belief.

Tracy Epp  
(Signature of Affiant)

State of Texas  
County of Hidalgo

Personally appeared before me the above named Tracy Epp personally known to me, who, being duly sworn, deposes and says 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 19<sup>th</sup> day of January, 192000



Enche Hernandez  
(Notary Public)  
My commission expires 10/06/2002

**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: IDEA Academy, Inc., IDEA Academy

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Daniel Hernandez
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) N/A

c. Other names used at any time N/A

3. Social Security Number\*: [REDACTED]

4. Date and Place of Birth: [REDACTED] Edcouch, Tx

5. Business Address: 116 North 10<sup>th</sup> St., Donna, Tx 78537  
Business Telephone: (956) 464-1310

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1978-Present	P.O. Box 1081	Edcouch, Tx	78543

7. Education: Dates, Names, Locations and Degrees

College Pan American College B.A. 1960  
Edinburg, Tx.

Graduate Studies Texas A&I University, Kingsville, Tx M.S.

## APPLICATION

Others N/A

8. List Membership in Professional Societies and Associations: TASA - Texas Association of School Administrators (Life)

9. Present or Proposed Position with the Proposed Charter School: Board Member

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1994-Present	Donna J.S.D.	116 W. 10 St. Denver, CO	Curriculum Specialist
1997-1999	Edgouch-Elva J.S.D.	Edgouch, TX	Superintendent
1970-1977	LaVilla T.S.D.	LaVilla, TX	Superintendent

11. Present employer may be contacted: ☒ Yes ☐ No (Circle One)

Former employers may be contacted: ☒ Yes ☐ No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? No

If any claims were made on the bond, give details: N/A

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? No

If yes, give details: N/A

13. 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): Professional Administrator (Life)

14. During the last ten (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? No If yes, give details: N/A

# APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? NO

If yes, give details: N/A

16. Have you ever been adjudged bankrupt? NO

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? NO

If yes, give details: N/A

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? NO

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? NO. If so, please furnish details: N/A

Dated and signed this 19<sup>th</sup> day of January, 2000, at \_\_\_\_\_

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.

Daniel Hernandez  
(Signature of Affiant)

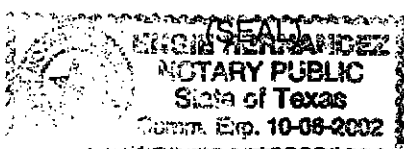
State of Texas  
County of Hidalgo

Personally appeared before me the above named Daniel Hernandez personally known to me, who, being duly sworn, deposes and says 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 19<sup>th</sup> day of January, 2000

Enrique Hernandez  
(Notary Public)

My commission expires 10/06/2002





## APPLICATION

Others \_\_\_\_\_

8. List Membership in Professional Societies and Associations: \_\_\_\_\_

9. Present or Proposed Position with the Proposed Charter School:
- President of IDEA Academy, Inc. and School Director of IDEA Academy

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1997-Present	Donna ISD	116 N. 10 <sup>th</sup> St. Donna, TX	Teacher, Director of IDEA Academy
1999	Teach for America	315 West 36 <sup>th</sup> St. 6 <sup>th</sup> floor NY, NY 10018	School Director

11. Present employer may be contacted:
- Yes
- No (Circle One)

Former employers may be contacted: Yes No (Circle One)

12. a Have you ever been in a position which required a fidelity bond?
- No

If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? No

If yes, give details: \_\_\_\_\_

13. 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):
- Probationary Teaching Certificate, issued 1997

14. During the last ten (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?
- No
- If yes, give details: \_\_\_\_\_

APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? Yes

If yes, give details: I will be the IDEA Academy School Director

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervisor or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? No If so, please furnish details: \_\_\_\_\_

Dated and signed this 19<sup>th</sup> day of January, 2000, at \_\_\_\_\_

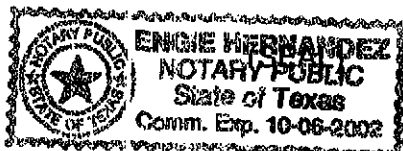
I hereby certify under penalty of perjury that I am acting on my own behalf, and that the foregoing statements are true and correct to the best of my knowledge and belief.

Thomas E. Torkelson  
(Signature of Affiant)  
Thomas E. Torkelson

State of Texas  
County of Hidalgo

Personally appeared before me the above named Thomas E. Torkelson personally known to me, who, being duly sworn, deposes and says 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 19<sup>th</sup> day of January, 2000



Engie Hernandez  
(Notary Public)  
My commission expires 10/06/2002

## APPLICATION

Others Certification : 1. Special Education  
2. E.S.L. 3. Midmanagement

8. List Membership in Professional Societies and Associations: <sup>B</sup> U.T.-P.A.U. Alumni Association, Board Member 2. Teach For America, Board Member  
Texas Council of Administrators of Special Education

9. Present or Proposed Position with the Proposed Charter School : \_\_\_\_\_

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1992-present	Donna T.S.D.		Elem. Supervisor Sp. Ed. Elem. Principal 5 yrs Asst. Principal Middle School 2 Migrant Specialists 2 1/2 months
1986-1992	P.S.J.A. T.S.D.		Austin Jr. High - Teacher, Sp. Ed.
1977-1983			P.S.J.A. High School Teacher

11. Present employer may be contacted: ☒ Yes ☐ No (Circle One)

Former employers may be contacted: ☒ Yes ☐ No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? NO  
 If any claims were made on the bond, give details: \_\_\_\_\_

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? NO  
 If yes, give details: \_\_\_\_\_

13. 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) T.E.A. - Teaching Certificates in  
Elem. Ed., Sp. Ed., E.S.L., Midmanagement

14. During the last ten (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? NO If yes, give details: \_\_\_\_\_

APPLICATION

15. Will you or members of your immediate family be employed by (directly or through contract) or receive remuneration from the proposed charter school? No

If yes, give details: \_\_\_\_\_

16. Have you ever been adjudged bankrupt? No

17. Have you ever been convicted or had a sentence imposed or suspended or had pronouncement of a sentence suspended or been pardoned for conviction of or pleaded guilty or nolo contendere to any information or indictment charging any felony, or charging a felony or misdemeanor involving moral turpitude, or have you been the subject of any disciplinary proceedings of any federal or state regulatory agency? No

If yes, give details: \_\_\_\_\_

18. Have you ever been an officer, director, trustee, investment committee member, key employee, or controlling stockholder of any business, which, while you occupied any such position or capacity with respect to it, became insolvent or was placed under supervision or in receivership, rehabilitation, liquidation or conservatorship? No

19. Are you now, or have you been, within the past five years, a plaintiff or defendant in any lawsuit? yes. If so, please furnish details: Pending appeal in a personal injury case - 1981 - Plaintiff

Dated and signed this 19 day of January, 19 2000, at \_\_\_\_\_

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.

Thelma M. Balli  
(Signature of Affiant)

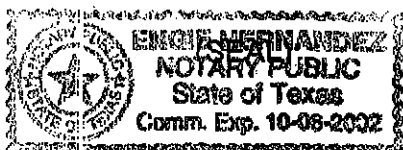
State of Texas  
County of Hidalgo

Personally appeared before me the above named Thelma M. Balli personally known to me, who, being duly sworn, deposes and says 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 19th day of January, 19 2000

Enrique Hernandez  
(Notary Public)

My commission expires 10/06/2002



**TEXAS EDUCATION AGENCY**  
**OPEN-ENROLLMENT CHARTER SCHOOL APPLICANT**  
**BIOGRAPHICAL AFFIDAVIT**  
(Print or Type)

Full Name of Sponsoring Entity and Name of Proposed Charter School: IDEA Academy, Inc., IDEA Academy

In connection with the above-named organization and charter school application, I herewith make representations and supply information about myself as hereinafter set forth. (Attach addendum or separate sheet if space hereon is insufficient to answer any questions fully.)

IF ANSWER IS "NO" OR "NONE", SO STATE.

1. Full Name (Initials Not Acceptable): Daniel Hernandez
2. Have you ever had your name changed? NO If yes, give reason for the change: \_\_\_\_\_

b. Maiden Name (if female) N/A  
c. Other names used at any time N/A

3. Social Security Number\*: [REDACTED]
4. Date and Place of Birth: [REDACTED] Edinburgh, Tx
5. Business Address: 116 North 10<sup>th</sup> St. Dallas, Tx 75237  
Business Telephone: (956) 464-1310

6. List your residences for the last ten (10) years starting with your current address, giving:

DATES	ADDRESS	CITY AND STATE	ZIP CODE
1978-Present	P.O. Box 1081	Elisa, Tx	78543

7. Education: Dates, Names, Locations and Degrees

College Pan American College B.A. 1960  
Edinburg, Tx.

Graduate Studies Texas A&I University, Kingsville, Tx M.S.

# APPLICATION

Others N/A

8. List Membership in Professional Societies and Associations: TASA - Texas Association of School Administrators (L.F.)

9. Present or Proposed Position with the Proposed Charter School: Board Member

10. List complete employment record (up to and including present jobs, positions, directorates or officerships) for the past twenty (20) years:

DATES	EMPLOYER	ADDRESS	TITLE
1994-Present	Donna J.S.D.	116 W. 10 St. Donna, Tx	Curriculum Specialist
1997-1999	Edcouch-Edg J.S.D.	Edcouch, Tx	Superintendent
1970-1977	LaVilla T.S.D.	LaVilla, Tx	Superintendent

11. Present employer may be contacted: ☒ Yes ☐ No (Circle One)

Former employers may be contacted: ☒ Yes ☐ No (Circle One)

12. a Have you ever been in a position which required a fidelity bond? No  
If any claims were made on the bond, give details: N/A

b Have you ever been denied an individual or position schedule fidelity bond, or had a bond cancelled or revoked? No  
If yes, give details: N/A

13. 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): Professional Administrator (Life)

14. During the last ten (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? No If yes, give details: N/A

On May 12, 2000, the State Board of Education (SBOE) adopted changes to Policy 4.3, Disclosure of Campaign Contributions and Gifts. These changes require expanded reporting from those who wish to enter into a contract, grant, or charter with the SBOE. A continuing duty to report exists after the grant, charter, or contract is issued.

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:

Douglas Killian

Employer or Company represented:

Imogene Foundation

Position:

Executive Director

Services rendered to SBOE or contract, grant, or charter issued by SBOE:

Transaction 1.

DATE: \_\_\_\_\_ AMOUNT: \_\_\_\_\_

NAME OF PERSON(S) RECEIVING BENEFIT OR CONTRIBUTION:

N.A.

DETAILED DESCRIPTION OF EXPENDITURE: \_\_\_\_\_

Transaction 2.

DATE: \_\_\_\_\_ AMOUNT: \_\_\_\_\_

NAME OF PERSON(S) RECEIVING BENEFIT OR CONTRIBUTION:

N.A.

DETAILED DESCRIPTION OF EXPENDITURE: \_\_\_\_\_

Transaction 3.

DATE: \_\_\_\_\_ AMOUNT: \_\_\_\_\_

NAME OF PERSON(S) RECEIVING BENEFIT OR CONTRIBUTION:

N.A.

DETAILED DESCRIPTION OF EXPENDITURE: \_\_\_\_\_

## Final Documentation: Charter Schools Opening Fall 2000

Be prepared to supply the following information and documentation to the Charter School Division at the July 20, 2000, orientation. Please note that final authorization to operate the charter school is contingent upon the submission of these documents.

Name of School: IDEA Date of Opening: \_\_\_\_\_

Type of Charter: Open Enrollment \_\_\_\_\_ 75% Rule (At-Risk) \_\_\_\_\_

Director of Charter School: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Required Final Documentation

- Federal Assurances - gave to Sheryl Walton - make sure in file
- Charter Contract ✓
- IRS Determination Letter recognizing the tax-exempt status of the sponsoring entity (not applicable to schools sponsored by universities or governmental entities) ✓

- making me nervous
- Certificate of Occupancy for school facility met w/ Fire Marshall, City Inspector - will submit to TCA before they open
- Building Inspection Certificate (if local authority requires such a certificate in addition to a certificate of occupancy) - sending letter explaining not require
- Fire Safety Inspection Certificate (if local authority requires such a certificate in addition to a certificate of occupancy) will submit prior to opening; currently working w/ Fire Marshall



- A status report detailing steps taken to comply with applicable health and safety requirements. Please provide copies of all communications with appropriate enforcement agencies (e.g., local health department, local fire marshal). *submitted documentation - memo from Tam T.*
- Final site plan                      11      ✓
- Final governance documents (to be submitted only if governance information has changed since submission of the charter application)
  1. Submit final copies of the sponsoring entity's articles of incorporation, by-laws, contracts, and other documents required by application or applicable laws — *by-laws haven't changed since previously submitted*
  2. Updated board members' names, addresses, telephone numbers, biographical affidavits and required disclosures — *will submit prior to opening*
- Evidence of deliberation by school board on the school's insurance coverage plans, including employee health insurance, general liability insurance, property insurance, and directors' and officers' liability coverage, if any. *at Board minutes submitted*
- Updated budgets — *will submit budget before opening*
- Final school calendar

## **Suggested Considerations for New Charter Schools**

The following is not an exhaustive list. Rather, the matters listed below are merely a few of the many you should address with your governing board prior to opening. In some cases, you are required to have policies and procedures in place by the beginning of school. In all cases, these areas must be addressed near the opening of school, and policies and procedures in these areas will be monitored by TEA during on-site visits. Please feel free, however, to contact your regional education service center or the Charter Schools Division at TEA if you would like to discuss any of the following issues.

### **Special Programs**

- Special education policies and procedures

Bilingual/ESL policies and procedures

Child Nutrition policies and procedures

### **Student Health and Safety Plan**

- Screening schedules (TEC §38.003)
- Immunization Review Plan (TEC §38.002)
- Steroid Notice (Grades 7-12)
- Asbestos management plan
- Student Code of Conduct, including procedures for ensuring that students' due process rights are protected
- Crisis Management Plan

### **Admission and Enrollment**

- Marketing plan covering all parts of geographic area

- Enrollment deadlines
- Admission forms and procedures
- Lottery procedures

### **Student Records Management Plan**

- Procedures to maintain confidentiality of student records
- Procedures for recording student achievement, including provisions for transcripts that comply with state requirements
- Procedures for collecting and maintaining Home Language Surveys
- Procedures for collecting and maintaining information regarding eligibility for the Free and Reduced Price Lunch program
- Procedures for collecting and maintaining student attendance data
- Procedures for distributing and collecting notices required by the Family Educational Right to Privacy Act

### **Personnel**

- Procedures for payment of funds owed to the Teacher Retirement System (TRS)
- Procedures for payment of funds owed to the Internal Revenue Service
- Arrangements for Workman's Compensation coverage
- Publication of employee handbook
- Criminal History Checks

**Open Government**

- Policies and procedures for setting board meeting agendas, posting meetings, recording minutes in accordance with state law
- Policies and procedures for providing public access to school records in accordance with state law

**Instruction**

- Textbook adoption and manner of selection
- Curriculum materials and purchase orders
- Lesson plan format/process
- Inservice/Training/Staff Development Plans
- TAAS administration, including procedures for ordering materials, test security, staff training (contact service center for training dates)

# I.D.E.A. Academy

## 2000-2001 School Calendar

CHARTER  
CONTINGENCIES

- Holiday
- △ Teacher Work Day
- Staff Development
- ◇ Saturday School

### Saturday School

Aug. 19 & 26, Sept. 9 & 23, Oct. 7 & 21,  
Nov. 4 & 18, Dec. 2 & 16, Jan. 13 & 27,  
Feb. 10 & 24, Mar. 3, 24, & 31, Apr. 7 & 21

### Exams

Oct. 5, 6, & 7

Dec. 14, 15, & 16

Mar. 1, 2, & 3

May Exams to be announced

Aug. 17th-First Day of School

June 1st-Last Day of School

Feb. 20th-TAAS Testing

Apr. 24-27th-TAAS Testing

1st Nine Weeks Aug. 17-Oct. 12

2nd Nine Weeks Oct. 16-Dec. 20

3rd Nine Weeks Jan. 9-Mar. 9

4th Nine Weeks Mar. 19-Jun. 1

July, 2000						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August, 2000						
S	M	T	W	T	F	S
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September, 2000						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October, 2000						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

November, 2000						
S	M	T	W	T	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December, 2000						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January, 2001						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February, 2001						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

March, 2001						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

April, 2001						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May, 2001						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June, 2001						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**IDEA Academy Board of Directors Meeting**

**Monday, July 3, 2000**

**Meeting is opened at 7:15 P.M.**

**Present - JoAnn Gonzales, Paul Guinn, and Tom Torkelson**

**Agenda Item #1**

**Mr. Torkelson passes out and reads minutes from last board meeting. Mr. Torkelson motions to approve the minutes from the board meeting held on June 19<sup>th</sup>. Mr. Guinn seconds the motion.**

**Agenda Item #2**

**The Drug and Alcohol Free School Statement is passed out for board members to read. Mr. Guinn motions to approve the policy paper as written. Mr. Torkelson seconds the motion.**

**Agenda Item #3**

**The IDEA Academy would like to participate in UIL events. The cost is \$300.00 per school year. Mr. Guinn motions to participate in UIL events. Mr. Torkelson seconds the motion.**

**Agenda Item #4**

**Mr. Torkelson passes out an amended one year budget and three year projection of the budget to board members. The additional cost of purchasing buses has been added to the budget. The plan to contract with Donna ISD failed. Mr. Guinn motions to accept the amended budgets. Mr. Torkelson seconds the motion.**

**Agenda Item #5**

**Mr. Torkelson opens a discussion on insurance policies for IDEA Academy staff members. We are looking at health plans and liability. Mr. Guinn motions to have Mr. Torkelson choose the best plan he can find. Mr. Torkelson seconds the motion.**

**Agenda Item #6**

**Discussion on the wages on support staff. Mr. Guinn states that support staff needs to be paid an hourly salary if they are required to work more than 40 hours per week. Support staff, unlike administration, needs to be paid for overtime hours. Mr. Torkelson states that support staff will not work more than 40 hours per week. Mr. Guinn motions to allow Mr. Torkelson to set the final pay scale for support staff. Mr. Torkelson seconds the motion.**

**Agenda Item # 7**

**No discussion is held on a staff Dinner.**

**Agenda Item # 8**

**Open forum with no discussion taking place.**

**Motion to Adjourn**

**Mr. Guinn motions to adjourn the meeting. Mr. Torkelson seconds the motion. Meeting is adjourned at 7:34 P.M.**

CHARTER  
CONTINGENCIES

The State of Texas  
Secretary of State

CERTIFICATE OF INCORPORATION  
OF

IDEA ACADEMY, INC.  
CHARTER NUMBER 01567442

THE UNDERSIGNED, AS SECRETARY OF STATE OF THE STATE OF TEXAS,  
HEREBY CERTIFIES THAT THE ATTACHED ARTICLES OF INCORPORATION FOR THE  
ABOVE NAMED CORPORATION HAVE BEEN RECEIVED IN THIS OFFICE AND ARE  
FOUND TO CONFORM TO LAW.

ACCORDINGLY, THE UNDERSIGNED, AS SECRETARY OF STATE, AND BY VIRTUE  
OF THE AUTHORITY VESTED IN THE SECRETARY BY LAW, HEREBY ISSUES THIS  
CERTIFICATE OF INCORPORATION.

ISSUANCE OF THIS CERTIFICATE OF INCORPORATION DOES NOT AUTHORIZE  
THE USE OF A CORPORATE NAME IN THIS STATE IN VIOLATION OF THE RIGHTS OF  
ANOTHER UNDER THE FEDERAL TRADEMARK ACT OF 1946, THE TEXAS TRADEMARK LAW,  
THE ASSUMED BUSINESS OR PROFESSIONAL NAME ACT OR THE COMMON LAW.

DATED JAN. 27, 2000

EFFECTIVE JAN. 27, 2000

A handwritten signature in cursive script, appearing to read "Elton Bomer".

Elton Bomer, Secretary of State

CHARTER  
CONTINGENCIES  
FILED  
In the Office of the  
Secretary of State of Texas  
JAN 27 2000  
Comptroller General

## ARTICLES OF INCORPORATION

OF

IDEA Academy, Inc.

We, the undersigned natural persons over the age of eighteen (18) acting as incorporators, adopt the following Articles of Incorporation of IDEA Academy, Inc.

### ARTICLE I

#### Name

The name of the Corporation is IDEA Academy, Inc..

### ARTICLE II

#### Nonprofit Corporation

The Corporation is a nonprofit corporation. When it dissolves, all of its assets will be distributed to the State of Texas or an organization exempt from taxes under Internal Revenue Code Section 501(c)(3) for one or more purposes exempt under the Texas franchise tax.

### ARTICLE III

#### Duration

The Corporation will continue in perpetuity.

### ARTICLE IV

#### Purposes

The purposes for organizing the Corporation are to perform charitable activities within the meaning of Internal Revenue Code Section 501(c)(3) and Texas Tax Code Section 11.18(c). Specifically, the Corporation is organized to operate a charitable school to be operated as an open enrollment charter school under the applicable provisions of the Texas Education Code.

### ARTICLE V

#### Powers

Except as these Articles otherwise provide, the Corporation has all the powers provided in the Texas Non-Profit Corporation Act. Moreover, the Corporation has all implied powers necessary and proper to carry out its express powers. The Corporation may reasonably compensate directors or officers for services rendered to or for the Corporation in furtherance of one or more of its purposes.



## ARTICLE VI Restrictions and Requirements

The Corporation may not take any action that would be inconsistent with the requirements for a tax exemption under Internal Revenue Code Section 501(c)(3) and related regulations, rulings, and procedures. Nor may it take any action that would be inconsistent with the requirements for receiving tax-deductible charitable contributions under Internal Revenue Code Section 170(c)(2) and related regulations, rulings, and procedures. Regardless of any other provision in these Articles of Incorporation or state law, the Corporation may not:

1. Engage in activities or use its assets in manners that do not further one or more exempt purposes, as set forth in these Articles and defined by the Internal Revenue Code and related regulations, rulings, and procedures, except to an insubstantial degree.
2. Serve a private interest other than one clearly incidental to an overriding public interest.
3. Devote more than an insubstantial part of its activities to attempting to influence legislation by propaganda or otherwise, except as provided by the Internal Revenue Code and related regulations, rulings, and procedures.
4. Participate in or intervene in any political campaign on behalf of or in opposition to any candidate for public office. The prohibited activities include publishing or distributing statements and any other direct or indirect campaign activities.
5. Have objectives characterizing it as an "action organization" as defined by the Internal Revenue Code and related regulations, rulings, and procedures.
6. Distribute its assets on dissolution other than for one or more exempt purposes. On dissolution, the Corporation's assets will be distributed to the state government for a public purpose, or to an organization exempt from taxes under Internal Revenue Code Section 501(c)(3) to be used to accomplish the general purposes for which the Corporation was organized.
7. Permit any part of the Corporation's net earnings to inure to the benefit of any private shareholder or member of the Corporation or any private individual.
8. Carry on an unrelated trade or business, except as a secondary purpose related to the Corporation's primary, exempt purposes.

**ARTICLE VII**  
**Membership**

The Corporation will have no members.

**ARTICLE VIII**  
**Initial Registered Office and Agent**

The street address of the Corporation's initial registered office is 703 Thornwood Avenue, Mission, Texas 78572. The name of the initial registered agent at this office is Thomas E. Torkelson.

**ARTICLE IX**  
**Managing Body of Corporation**

The management of the Corporation is vested in its Board of Directors and such committees of the Board that the Board may, from time-to-time, establish. The bylaws will provide the qualifications, manner of selection, duties, terms, and other matters relating to the Board of Directors.

The initial Board will consist of three (3) persons. The initial Board will consist of the following persons at the following addresses:

<u>Name</u>	<u>Address:</u>
Thomas E. Torkelson	703 Thornwood Avenue Mission, Texas 78572
Tracy Epp	800 South I Road Pharr, Texas 78577
Thelma M. Balli	P.O. Box 2206 Alamo, Texas 78516

The number of directors may be increased or decreased by adopting or amending bylaws. The number of directors may not be decreased to fewer than three.

**ARTICLE X**  
**Limitation on Liability of Directors**

A director is not liable to the Corporation or members for monetary damages for an act or omission in the director's capacity as director except as otherwise provided by a Texas statute.

**ARTICLE XI**  
**Indemnification**

The Corporation may indemnify a person who was, is, or is threatened to be made a named defendant or respondent in litigation or other proceedings because the person is or was a director or other person related to the Corporation as provided by the provisions of the Texas Non-Profit Corporation Act governing indemnification.

As the bylaws provide, the Board may define the requirements and limitations for the Corporation to indemnify directors, officers or others related to the Corporation.

**ARTICLE XII**  
**Construction**

All references in these Articles to statutes, regulations, or other sources of legal authority refer to the authorities cited, or their successors, as they may be amended from time to time

**ARTICLE XIII**  
**Incorporators**

The name and street address of each incorporator is:

<u>Name</u>	<u>Address:</u>
Thomas E. Torkelson	703 Thomwood Avenue Mission, Texas 78572
Tracy Epp	800 South I Road Pharr, Texas 78577
Thelma M. Balli	P.O.Box 2206 Alamo, Texas 78516

**ARTICLE XIV**  
**Action by Written Consent**

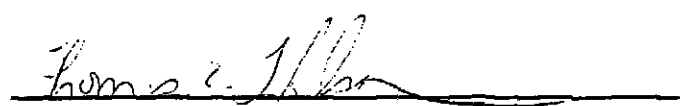
Action may be taken by use of signed written consents by the number of members, directors, or committee members whose vote would be necessary to take action at a meeting at which all such persons entitled to vote were present and voted. Each written consent must bear the date of signature of each person signing it. A consent signed by fewer than all of the members, directors, or committee members is not effective to take the intended action unless consents, signed by the required number of persons, are delivered

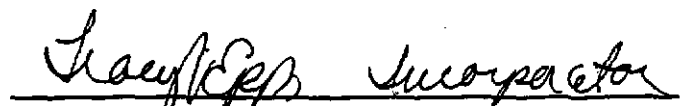
to the Corporation within sixty (60) days after the date of the earliest-dated consent delivered to the Corporation. Delivery must be made by hand, or by certified or registered mail, return receipt requested. The delivery may be made to the Corporation's registered office, registered agent, principal place of business, transfer agent, registrar, exchange agent, or an officer or agent having custody of books in which the relevant proceedings are recorded. If delivery is made to the Corporation's principal place of business, the consent must be addressed to the president or principal executive officer.


The Corporation will give prompt notice of the action taken to persons who do not sign consents. If the action requires documents to be filed with the secretary of state, the filed documents will state that the written consent procedures have been properly followed.

A telegram, telex, cablegram, or similar transmission by a member, director, or committee member, or photographic facsimile, or similar reproduction of a signed writing is to be regarded as being signed by the member, director, or committee member.

EXECUTED this 24<sup>th</sup> day of January, 2000.

  
Thomas E. Torkelson, Incorporator

  
Tracy Epp, Incorporator

  
Thelma M. Balli, Incorporator

To: TEA Charter School Division

From: Tom Torkelson, President and School Director, IDEA Academy

Date: July 18, 2000

Re: Final Site Plan

The IDEA Academy will be housed in the First Baptist Church on 1009 Hester Avenue, located in downtown Donna. The IDEA Academy entered into a lease agreement with the church on July 14, 2000. In addition, the IDEA Academy has contracted with GE Capital Modular to erect four modular classrooms on a lot of land across from the First Baptist Church on the East side of 11<sup>th</sup> St, less than 30 yards from the church. These classrooms will be in place by August 3<sup>rd</sup>.

Status Report of Safety and Health Compliance

To: TEA Charter School Division

From: Tom Torkelson, President and School Director, IDEA Academy

Date: July 18, 2000

Re: Safety Compliance

On July 10, 2000 Rolando Rodriguez, inspector for the city of Donna, visited our school site at 1009 Hester Avenue. Mr. Rodriguez is also doing all fire inspections for the city, since there is currently no fire inspector. Mr. Rodriguez will issue the certificate of Occupancy after we complete minor renovations and improvements to the facility. We must install an auxiliary lighting system and lighted exit signs, change locks and handles to external doors to ensure that they cannot be locked from the inside in such a way as to prevent exit from the building, even if they are locked. There are no health compliance that we must meet, according to Mr. Rodriguez. We are on schedule to make all improvement by the July 29, 2000, and will supply TEA with the appropriate documents at that time.

CHARTER  
CONTINGENCIES

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

DEPARTMENT OF THE TREASURY

Date: JUN 27 2000

IDEA ACADEMY INC  
C/O THOMAS E TORKELSON  
703 THORNWOOD AVE  
MISSION, TX 78572

Employer Identification Number:

74-2948339

DLN:

17053090004020

Contact Person:

TODD COLE

ID# 75901

Contact Telephone Number:

(877) 829-5500

Accounting Period Ending:

July 31

Form 990 Required:

Yes

Addendum Applies:

Yes

Dear Applicant:

Based on information 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).

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in sections 509(a)(1) and 170(b)(1)(A)(ii).

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

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

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, if you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958. Additionally, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please contact your key district office.

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the

-2-

IDEA ACADEMY INC

part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

Donors may deduct contributions to you as provided in section 170 of the 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 Code sections 2055, 2106, and 2522.

Contribution deductions are allowable to donors 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. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

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

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 be sure your return is complete before you file it.

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.



CHARTER  
CONTINGENCIES

-3-

IDEA ACADEMY INC

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

This determination is based on evidence that your funds are dedicated to the purposes listed in section 501(c)(3) of the Code. To assure your continued exemption, you should keep records to show that funds are expended only for those purposes. If you distribute funds to other organizations, your records should show whether they are exempt under section 501(c)(3). In cases where the recipient organization is not exempt under section 501(c)(3), there should be evidence that the funds will remain dedicated to the required purposes and that they will be used for those purposes by the recipient.

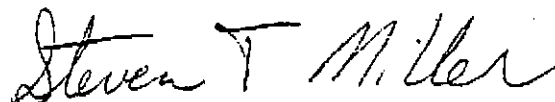
If distributions are made to individuals, case histories regarding the recipients should be kept showing names, addresses, purposes of awards, manner of selection, relationship (if any) to members, officers, trustees or donors of funds to you, so that any and all distributions made to individuals can be substantiated upon request by the Internal Revenue Service. (Revenue Ruling 56-304, C.B. 1956-2, page 306.)

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

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

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

Sincerely yours,



Steven T. Miller  
Director, Exempt Organizations

CHARTER  
CONTINGENCIES

-4-

DOEA ACADEMY INC

You are not subject to the publishing requirements of Rev.Proc. 75-50. 1975-2 C.B. 587 so long as you operate a public school. If your method of operation changes to the extent that your contract with the government is terminated, canceled or not renewed, you should notify your Key District Office. If you continue to operate a school, you will be required to comply with the requirements of Rev.Proc. 75-50.

**CONTRACT FOR CHARTER**

This contract is executed the 21st day of June 2000 between the Texas State Board of Education (the "Board") and I.D.E.A. Academy ("Charterholder") for an open-enrollment charter to operate a Texas public school to be known as The I.D.E.A. Academy.

<b>General</b>
----------------

1. **Definitions.** As used in this contract:
  - "Charter" means the open-enrollment charter, as provided by Subchapter D, Chapter 12, Texas Education Code (TEC), granted by this contract.
  - "Charterholder" means the sponsoring entity identified in the charter application.
  - "Charter school" means the open-enrollment charter school. Charterholder agrees to operate as provided in this contract. The charter school is a Texas public school.
  - "Agency" means the Texas Education Agency.
2. **The Charter.** This contract grants to Charterholder an open-enrollment charter under Subchapter D, Chapter 12, TEC. The terms of the charter include: (a) this contract; (b) applicable law; (c) Request for Application #701-00-006; (d) any condition, amendment, modification, revision or other change to the charter adopted or ratified by the Board; (e) all statements, assurances, commitments and representations made by Charterholder in its application for charter, attachments or related documents, to the extent consistent with (a) through (d); and (f) assurance by Charterholder, evidenced by execution of this contract, that no false information was submitted to the Agency or the Board by Charterholder, its agents or employees in support of its application for charter.
3. **Authority Granted by Charter.** The charter authorizes Charterholder to operate a charter school subject to the terms of the charter. Action inconsistent with the terms of the charter shall constitute a material violation of the charter.
4. **Alienation of Charter.** The charter may not be assigned, encumbered, pledged or in any way alienated for the benefit of creditors or otherwise. Charterholder may not delegate, assign, subcontract or otherwise alienate any of its rights or responsibilities under the charter. Any attempt to do so shall be null and void and of no force or effect; provided, however, that Charterholder may contract at fair market value for services necessary to carry out policies adopted by Charterholder or the governing body of the charter school. Charterholder may not engage or modify the

terms of the engagement of a private management company without approval by the Board in accordance with Paragraph 7 of this contract.

5. Term of Charter. The charter shall be in effect from June 21, 2000 through June 20, 2005, unless renewed or terminated.
6. Renewal of Charter. On timely application by Charterholder in a manner prescribed by the Board, the charter may be renewed for an additional period determined by the Board. The charter may be renewed only by written amendment approved by vote of the Board and properly executed by its chair.
7. Revision by Agreement. The terms of the charter may be revised with the consent of Charterholder by written amendment approved by vote of the Board. For purposes of this paragraph, the terms of the charter include, among other provisions, specifications concerning the school's governance structure, characteristics of the educational program to be offered, and the location, type and number of facilities at which the school will operate. The commissioner of education ("the commissioner") may revise the charter on a provisional basis during an interim between Board meetings; however, such action shall expire unless ratified by the Board at its next regular meeting. Nothing in this paragraph limits the authority of the Board or the commissioner to act in accordance with other provisions of this contract.

<b>Students</b>
-----------------

8. Open Enrollment. Admission and enrollment of students shall be open to any person who resides within the geographic boundaries stated in the charter and who is eligible for admission based on lawful criteria identified in the charter. Total enrollment shall not exceed 500 students. The charter school's admission policy shall prohibit discrimination on the basis of sex, national origin, ethnicity, religion, disability, academic or athletic ability, or the district the student would otherwise attend. Students who reside outside the geographic boundaries stated in the charter shall not be admitted to the charter school until all eligible applicants who reside within the boundaries have been enrolled.
9. Public Education Grant Students. Charterholder shall adopt an express policy providing for the admission of, and shall admit under such policy, students eligible for a public education grant, including those students who reside outside the geographic area identified in the charter application, under Subchapter G, Chapter 29, TEC.
10. Non-discrimination. The educational program of the charter school shall be nonsectarian, and shall not discriminate against any student or employee on the basis of race, creed, sex, national origin, religion, disability or need for special education services.
11. Children with Disabilities. The charter school is a "local educational agency" as defined by federal law. Charterholder must comply with the Individuals with Disabilities Education Act (IDEA), 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, 42 U.S.C. §12131-12165, and implementing regulations; Chapter 29, TEC, and implementing rules; and the many court cases applying these laws. For example:

- (a) Child Find. Charterholder must adopt and implement policies and practices that affirmatively seek out, identify, locate, and evaluate children with disabilities enrolled in the charter school or contacting the charter school regarding enrollment, and must develop and implement a practical method to determine which children with disabilities are currently receiving needed special education and related services. For each eligible child, Charterholder must develop and offer an individualized education plan appropriate to the needs of that student.
- (b) Free Appropriate Public Education. Charterholder must provide a free appropriate public education to all children with disabilities otherwise eligible to enroll in the charter school. If the program, staff or facilities of the charter school are not capable of meeting the needs of a particular child, Charterholder must implement changes necessary to accommodate the child at the charter school. If reasonable accommodations would be insufficient to enable the child to benefit from the charter school's program, Charterholder must, at its own expense, place the child at an appropriate school.
- (c) Services to Expelled Students. Charterholder must continue to provide a free appropriate public education to a child with disabilities even after expelling or suspending the child for valid disciplinary reasons. This obligation to serve the child continues until the end of the school year.
- (d) Monitoring. The charter school's implementation of the laws governing education of children with disabilities will be monitored for compliance by the United States Department of Education, Office of Special Education Programs; the United States Department of Education, Office of Civil Rights; the Texas Education Agency; and others. This monitoring activity includes responding to complaints, random on-site inspections and other investigations by the enforcing agencies, and will result in corrective actions imposed on Charterholder by these agencies for all discrepancies found.
- (e) Due Process Hearings. The charter school's implementation of the laws governing education of children with disabilities will, in addition, be subject to court supervision via litigation against Charterholder brought by individuals affected by the actions of the charter school. The cost of this litigation can be substantial.

Notice: These are only a few of the charter school's legal responsibilities in this area, included here for illustrative purposes only.

- 12. Student Performance and Accountability. Charterholder shall satisfy Subchapters B, C, D, and G of Chapter 39 of the TEC, and related Agency rules, as well as the student performance accountability criteria stated in its application for charter. Charterholder shall annually provide in a manner and form defined by the commissioner a written evaluation of

the charter school's compliance with the statements, assurances, commitments and representations made by Charterholder in its application for a charter, attachments, and related documents.

13. Criminal History. Charterholder shall take prompt and appropriate measures if Charterholder or the charter school, or any of their employees or agents, obtains information that an employee or volunteer of the charter school or an employee, officer, or board member of a management company contracting with the charter school has a reported criminal history that bears directly on the duties and responsibilities of the employee, volunteer, or management company at the school. Charterholder further represents that the Board and the Agency shall be notified immediately of such information and the measures taken.
14. Reporting Child Abuse or Neglect. Charterholder shall adopt and disseminate to all charter school staff and volunteers a policy governing child abuse reports required by Chapter 261, Texas Family Code. The policy shall require that employees, volunteers or agents of Charterholder or the charter school report child abuse or neglect directly to an appropriate entity listed in Chapter 261, Texas Family Code.
15. Notice to District. Charterholder shall 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.
16. School Year. Charterholder shall adopt a school year with fixed beginning and ending dates.

<b>Financial Management</b>
-----------------------------

17. Fiscal Year. Charterholder shall adopt a fiscal year beginning September 1 and ending August 31.
18. Financial Accounting. Unless otherwise notified by the Agency, Charterholder shall comply fully with generally accepted accounting principles ("GAAP") and the Financial Accountability System Resource Guide, Bulletin 679 or its successor ("Bulletin 679") published by the Agency in the management and operation of the charter school.
19. Federal Requirements. Failure to comply with Internal Revenue Service withholding regulations shall constitute a material violation of the charter.
20. Workers' Compensation. Charterholder shall extend workers' compensation benefits to charter school employees by (1) becoming a self-insurer; (2) providing insurance under a workers' compensation insurance policy; or (3) entering into an agreement with other entities providing for self-insurance.
21. Annual Audit. Charterholder shall at its own expense have the financial and programmatic operations of the charter school audited annually by a certified public accountant holding a permit from the Texas State Board of Public Accountancy. Charterholder shall file a copy of the annual audit report, approved by Charterholder, with the Agency not later than the

120<sup>th</sup> day after the end of the fiscal year for which the audit was made. The audit must comply with Generally Accepted Auditing Standards and must include an audit of the accuracy of the fiscal information provided by the charter school through PEIMS. Financial statements in the audit must comply with Government Auditing Standards and the Office of Management and Budget Circular 133.

22. Attendance Accounting. To the extent required by the commissioner, Charterholder shall comply with the "Student Attendance Accounting Handbook" published by the Agency; provided, however, that Charterholder shall report attendance data to the Agency at six-week intervals or as directed by the Agency.
23. Foundation School Program. Distribution of funds to the charter school under Section 12.106, TEC, is contingent upon Charterholder's compliance with the terms of the charter. Charterholder is ineligible to receive Foundation School Program funds prior to execution of this contract by the Board. Within 30 days of receiving notice of overallocation and request for refund under Section 42.258, TEC, Charterholder shall transmit to the Agency an amount equal to the requested refund. If Charterholder fails to make the requested refund, the Agency may recover the overallocation by any means permitted by law, including but not limited to the process set forth in Section 42.258, TEC.
24. Tuition and Fees. Charterholder shall not charge tuition and shall not charge a fee except that it may charge a fee listed in Subsection 11.158(a), TEC.
25. Assets of Charter. Charterholder shall not apply, hold, credit, transfer or otherwise make use of funds, assets or resources of the charter school for any purpose other than operation of the charter school described in the charter.
26. Indebtedness of Charter. Charterholder shall not incur a debt, secure an obligation, extend credit, or otherwise make use of the credit or assets of the charter school for any purpose other than operation of the charter school described in the charter.
27. Interested Transactions. All financial transactions between the charter school and (a) Charterholder; (b) an officer, director, or employee of Charterholder or of the charter school; or (c) a person or entity having partial or complete control over Charterholder or the charter school shall be separately and clearly reflected in the accounting, auditing, budgeting, reporting, and record keeping systems of the charter school. Charterholder shall not transfer any asset of the charter or incur any debt except in return for goods or services provided for the benefit of the charter school at fair market value.
28. Non-Charter Activities. Charterholder shall keep separate and distinct accounting, auditing, budgeting, reporting, and record keeping systems for the management and operation of the charter school. Any business activities of Charterholder not directly related to the management and operation of the charter school shall be kept in separate and distinct

accounting, auditing, budgeting, reporting, and record keeping systems from those reflecting activities under the charter. Any commingling of charter and non-charter business in these systems shall be a material violation of the charter.

### Governance and Operations

29. Non-Profit Status. Charterholder shall take and refrain from all acts necessary to be and remain in good standing as an organization exempt from taxation under Section 501(c)(3), Internal Revenue Code. If Charterholder is incorporated, it shall in addition comply with all applicable laws governing its corporate status. Failure to comply with this paragraph is a material violation of the charter, and the Board may act on the violation even if the Internal Revenue Service, Secretary of State, or other body with jurisdiction has failed to act.
  
30. Records Retention and Management. Charterholder shall implement a records management system that conforms to the system required of school districts under the Local Government Records Act, Section 201.001, et seq., Local Government Code, and rules adopted thereunder; provided, however, that records subject to audit shall be retained and available for audit for a period of not less than five (5) years from the latter of the date of termination or renewal of the charter.
  
31. PEIMS Reporting. Charterholder shall report timely and accurate information to the Public Education Information Management System (PEIMS), as required by the commissioner.
  
32. Conflict of Interest. Charterholder shall comply with any applicable prohibition, restriction or requirement relating to conflicts of interest. If an officer or board member of Charterholder or of the charter school has a substantial interest, within the meaning of Chapter 171, Local Government Code, in a transaction, such interest shall be disclosed in public session at a duly called meeting of the governing body prior to any action on the transaction.
  
33. Disclosure of Campaign Contributions. Charterholder shall adopt policies that will ensure compliance with the disclosure requirements of State Board of Education Operating Rule 4.3 or its successor.
  
34. Indemnification. Charterholder 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 wrongful acts of Charterholder, its agents, employees, and subcontractors.
  
35. Failure to Operate. Charterholder shall operate the charter school for the full school term as described in the charter application in each year of the charter contract. Charterholder may not suspend operation for longer than 21 days without a revision to its charter, adopted by the Board, stating that the charter school is dormant and setting forth the date on which operations shall resume and any applicable conditions.



Charterholder may not suspend operation of the school for a period of more than three days without mailing written notice to the parent or guardian of each student and to the Agency at least 14 days in advance of the suspension. Suspension of operations in violation of this paragraph shall constitute abandonment of this contract and of the charter.

36. Charter School Facility. Charterholder shall have and maintain throughout the term of the charter a lease agreement, title or other legal instrument granting to Charterholder the right to occupy and use one or more facilities suitable for use as the charter school facilities described by the charter. During any period of dormancy granted by the Board, this requirement may be waived by the Board. Facilities occupied and used as charter school facilities shall comply with all applicable laws, including, but not limited to, the Texas Architectural Barriers Act, Article 9102, Vernon's Texas Civil Statutes.

<b>Enforcement</b>
--------------------

37. Agency Investigations. The commissioner may in his sound discretion direct the Agency to conduct investigations of the charter school to determine compliance with the terms of the charter or as authorized in the Texas Education Code or other law. Charterholder, its employees and agents shall fully cooperate with such investigations. Failure to timely comply with reasonable requests for access to sites, personnel, documents or things is a material violation of the charter.
38. Commissioner Authority. The commissioner in his sole discretion may take any action authorized by Section 39.131, TEC, Chapter 29, TEC, or Chapter 42, TEC relating to the charter school. Such action is not "adverse action" as used in this contract. Charterholder, its employees and agents shall fully cooperate with such actions. Failure to timely comply with any action authorized by Section 39.131, TEC or Chapter 29, TEC is a material violation of the charter.
39. Adverse Action. The Board in its sole discretion may modify, place on probation, revoke or deny timely renewal of the charter for cause ("adverse action"). Each of the following shall be cause for adverse action on the charter: (a) any material violation of the terms of the charter listed in paragraphs 2, 3, and 20; (b) failure to satisfy generally accepted accounting standards of fiscal management; or (c) failure to comply with an applicable law or rule.

<b>This Agreement</b>
-----------------------

40. Entire Agreement. 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 merged into, superseded by and canceled by this contract.
41. Severability. 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.

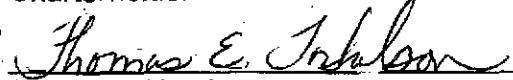
42. Conditions of Contract. Execution of this contract by the Board is conditioned on full and timely compliance by Charterholder with: (a) the terms, required assurances and conditions of Request for Application #701-00-006; (b) applicable law; and (c) all commitments and representations made in Charterholder's application and any supporting documents (to the extent such commitments and representations are consistent with the terms of this contract).
43. 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.
44. Venue. Any suit arising under this contract shall be brought in Travis County, Texas.
45. Governing Law. In any suit arising under this contract, Texas law shall apply.
46. Authority. By executing this contract, Charterholder represents that it is an "eligible entity" within the meaning of Section 12.101 (a), TEC. Charterholder shall immediately notify the Board 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 Charterholder. Charterholder further represents that the person signing this contract has been properly delegated authority to do so.

Entered into this 21<sup>st</sup> day of June, 2000.

Texas State Board of Education

  
By Chase Untermeyer, Chairman

Charterholder

  
(signature/date)

Chairperson, Governing Board of  
Charterholder

Thomas E. Tackelson  
(Printed Name)

  
(signature/date)

Chief Operating Officer, Charterholder

Thomas E. Tackelson  
(Printed Name)