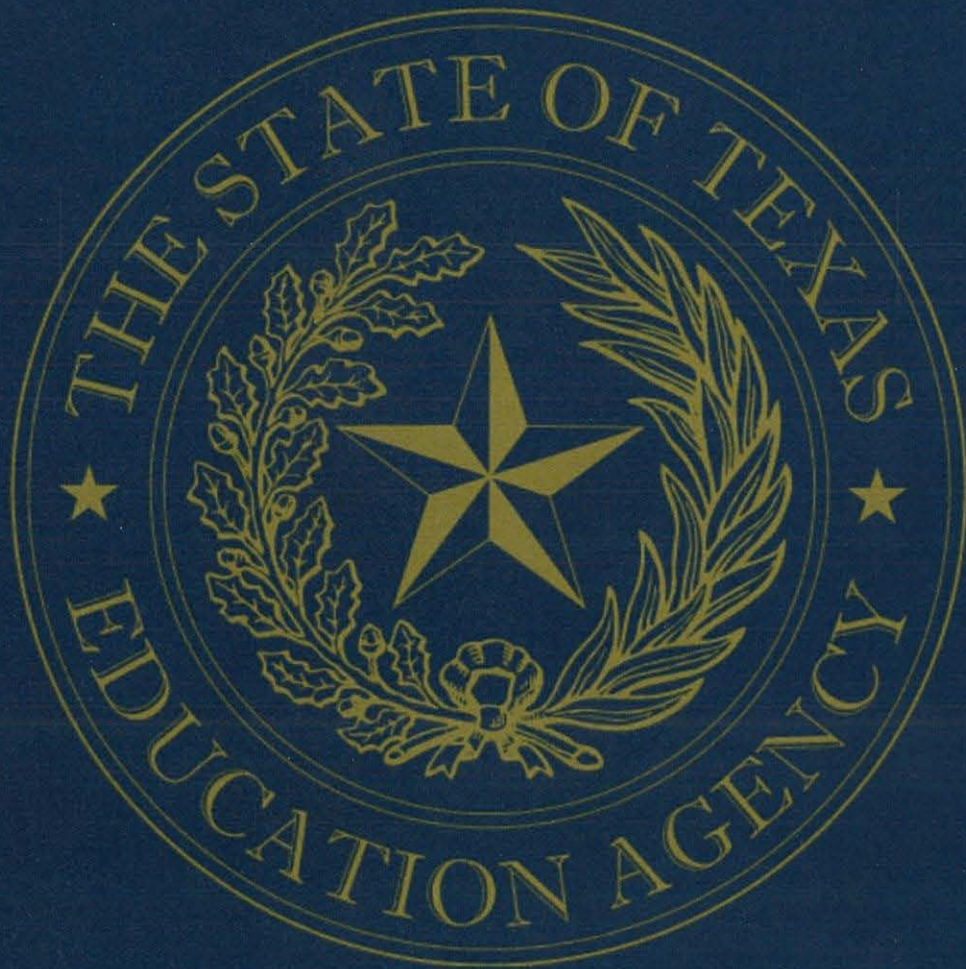


# GENERATION 25

OPEN-ENROLLMENT CHARTER APPLICATION



## RESPONSES AND ATTACHMENTS

Proposed Charter School Name: Cato Classical Academy

Sponsoring Entity: Classical Charter Schools of Texas, Inc.

RFA: 701-19-113

SAS: 566-19



## Table of Contents

|  |                  |
|--|------------------|
| Applicant Checklist.....   | 5                |
| Applicant Cover Sheet .....  | 9                |
| Executive Summary .....  | 12               |
| Targeted Community and Anticipated Student Population .....            | 14               |
| Geographic Boundaries.....   | 15               |
| Enrollment Projections.....  | 16               |
| Demographic Projections.....   | 17               |
| Community Engagement .....   | 18               |
| School Design .....  | 21               |
| Mission, Vision, and Overview of School Design.....                    | 21               |
| Curriculum and Instruction .....                                       | 25               |
| Strategies for Assessment of Learning and Data-Driven Instruction..... | 29 <sup>41</sup> |
| Supports for Special Populations .....                                 | 46               |
| School Culture and Safety .....  | 46 <sup>53</sup> |
| Promotion and Graduation Requirements.....                             | 56               |
| Family and Community Engagement .....                                  | 59               |
| Leadership and Governance.....   | 62               |
| Board Structure and Qualifications.....                                | 62               |
| Proposed Superintendent Qualifications .....                           | 66               |
| Proposed Instructional Leadership Team.....                            | 67               |
| Proposed Financial and Operations Leadership Teams .....               | 70               |
| Performance Management .....   | 73               |
| Talent Management and Development .....                                | 86               |
| Talent Management .....  | 86               |
| Professional Development and Evaluation .....                          | 90               |
| Retention .....  | 95               |
| Operational and Financial Plans .....                                  | 97               |
| School Calendar and Schedule.....                                      | 97               |
| Student Recruitment and Enrollment.....                                | 99               |
| Generation 25: <<Cato Classical Academy>>                              | 2                |



|   |                                     |
|---|-------------------------------------|
| Facility Acquisition.....   | 102                                 |
| Facility Identified.....  | 102                                 |
| Facility Not Identified.....  | 104                                 |
| Transportation .....  | 105                                 |
| Start-up Plan.....  | 105                                 |
| Financial Planning .....  | 108                                 |
| Attachments .....   | 110                                 |
| Attachment 1: Articles of Incorporation .....   | 110                                 |
| Attachment 2: 501(c)(3) Determination Letter .....  | 117                                 |
| Attachment 3: Applicant Information Session Documentation .....                             | 123                                 |
| Attachment 4: Evidence of Community Demand .....  | 125                                 |
| Attachment 5: Certified Mail Receipt Cards.....   | 128                                 |
| Attachment 6: Published Notice(s) of Public Meetings.....                                   | 132                                 |
| Attachment 7: Sample Course Scope and Sequence.....   | 133- 136                            |
| Attachment 8: Proposed Discipline Policy .....  | 143                                 |
| Attachment 9: Evidence of Community Support.....  | 154                                 |
| Attachment 10: Bylaws.....  | 155                                 |
| Attachment 11: Code of Ethics and Conflict of Interest Policy .....                         | 169                                 |
| Attachment 12: Board Members' Résumés and Biographical Affidavits.....                      | 175                                 |
| Attachment 13: Organizational Charts for Year 1 and Full Capacity .....                     | 217                                 |
| Attachment 14: Superintendent Evaluation Tool(s).....                                       | 220                                 |
| Attachment 15: Résumé and Qualifications for Proposed Superintendent .....                  | 224                                 |
| Attachment 16: Job Description or Qualifications for Superintendent.....                    | <b>Error! Bookmark not defined.</b> |
| Attachment 17: Résumé(s) and Qualifications for Proposed Instructional Leadership Team..... | 227                                 |
| Attachment 18: Job Descriptions or Qualifications for Instructional Leadership Team.....    | 228                                 |
| Attachment 19: Leadership Evaluation Tool(s) .....  | 232                                 |
| Attachment 20: Résumé(s) and/or Qualifications for Proposed Financial Team.....             | 234                                 |
| Attachment 21: Résumé(s) and/or Qualifications for Proposed Operations Team.....            | 237                                 |
| Attachment 22: Staffing Chart .....   | 238                                 |
| Attachment 23: Supplemental Human Resources Information Forms.....                          | 241                                 |
| Attachment 24: Teacher Evaluation Tool(s) .....   | 264                                 |
| Attachment 25: Proposed School Calendar (Annual) .....                                      | 277                                 |



|  |     |
|--|-----|
| Attachment 26: Proposed School Schedules.....                  | 279 |
| Attachment 27: Proposed Admissions and Enrollment Policy ..... | 282 |
| Attachment 28: Certificate of Occupancy for Facility .....     | 286 |
| Attachment 29: Evidence that Facility has been Secured .....   | 287 |
| Attachment 30: Detailed Start-up Plan .....                    | 288 |
| Attachment 31: Financial Plan Workbook.....                    | 292 |
| Attachment 32: Budget Narrative .....                          | 294 |
| Attachment 33: Evidence of Other Financial Support .....       | 299 |
| Attachment 34: Audit Report.....                               | 302 |
| Attachment 35: Credit Report.....                              | 307 |
| Attachment 36: IRS Form 990, Form 990-N, or Form 990-EZ .....  | 308 |
| Attachment 37: Plan for Insurance Coverage .....               | 309 |



# Applicant Checklist

Use this checklist to ensure the application is complete. In the third column, write “yes” to indicate that each section has been included in the Application Package.

| Sections                  | Required Elements  | Complete (yes/no) |
|---------------------------|--|-------------------|
| Applicant Checklist       | Applicant Checklist  | Yes               |
| Applicant Cover Sheet     | Applicant Cover Sheet  | Yes               |
| School Overview           | Executive Summary  | Yes               |
|                           | Targeted Community and Anticipated Student Population  | Yes               |
|                           | <ul style="list-style-type: none"> <li>• Geographic Boundaries</li> <li>• Enrollment Projections</li> <li>• Demographic Projections</li> </ul> |                   |
|                           | Community Engagement   | Yes               |
| School Design             | Mission, Vision, and Overview of School Design   | Yes               |
|                           | Curriculum and Instruction   | Yes               |
|                           | Strategies for Assessment of Learning and Data-Driven Instruction  | Yes               |
|                           | Supports for Special Populations   | Yes               |
|                           | School Culture and Safety  | Yes               |
|                           | Promotion and Graduation Requirements  | Yes               |
|                           | Family and Community Engagement  | Yes               |
| Leadership and Governance | Board Structure and Qualifications   | Yes               |
|                           | Proposed Superintendent Qualifications   | Yes               |
|                           | Proposed Instructional Leadership Team   | Yes               |
|                           | Proposed Financial and Operations Leadership Teams   | Yes               |
|                           | Performance Management   | Yes               |
| Talent Management         | Talent Management  | Yes               |



| <b>Sections</b>                 | <b>Required Elements</b>  | <b>Complete (yes/no)</b> |
|---------------------------------|---|--------------------------|
| and Development                 | Professional Development and Evaluation   | Yes                      |
|                                 | Retention   | Yes                      |
| Operational and Financial Plans | School Calendar and Schedule  | Yes                      |
|                                 | Student Recruitment and Enrollment  | Yes                      |
|                                 | Facility Acquisition <ul style="list-style-type: none"> <li>• Facility Identified</li> <li>• Facility Not Identified</li> </ul> | Yes                      |
|                                 | Transportation  | Yes                      |
|                                 | Start-up Plan   | Yes                      |
|                                 | Financial planning  | Yes                      |
| Attachments                     | Attachment 1: Articles of Incorporation   | Yes                      |
|                                 | Attachment 2: 501(c)(3) Determination Letter  | Yes                      |
|                                 | Attachment 3: Applicant Information Session Documentation   | Yes                      |
|                                 | Attachment 4: Evidence of Community Demand  | Yes                      |
|                                 | Attachment 5: Certified Mail Receipt Cards  | Yes                      |
|                                 | Attachment 6: Published Notice(s) of Public Meetings  | Yes                      |
|                                 | Attachment 7: Sample Course Scope and Sequence  | Yes                      |
|                                 | Attachment 8: Proposed Discipline Policy  | Yes                      |
|                                 | Attachment 9: Evidence of Community Support   | Yes                      |
|                                 | Attachment 10: Bylaws   | Yes                      |
|                                 | Attachment 11: Code of Ethics and Conflict of Interest Policy   | Yes                      |
|                                 | Attachment 12: Board Member Résumés and Biographical Affidavits   | Yes                      |
|                                 | Attachment 13: Organizational Charts for Year 1 and   | Yes                      |



| <b>Sections</b> | <b>Required Elements</b>  | <b>Complete (yes/no)</b> |
|-----------------|---|--------------------------|
| Attachments     | Full Capacity   |                          |
|                 | Attachment 14: Tool(s)/Process to Evaluate Superintendent   | Yes                      |
|                 | Attachment 15: Résumé and Qualifications for Proposed Superintendent OR                               | Yes                      |
|                 | Attachment 16: Job Description or Qualifications for Superintendent                                   | Yes                      |
|                 | Attachment 17: Résumé(s) and Qualifications for Proposed Instructional Leadership Team                | Yes                      |
|                 | Attachment 18: Job Descriptions or Qualifications for School's Instructional Leadership Team          | Yes                      |
|                 | Attachment 19: Tool(s)/Process to Evaluate Members of the School's Instructional Leadership Team      | Yes                      |
|                 | Attachment 20: Résumé(s) and/or Qualifications for Proposed Financial Team                            | Yes                      |
|                 | Attachment 21: Résumé(s) and/or Qualifications for Proposed Operations Team                           | Yes                      |
|                 | Attachment 22: Staffing Chart   | Yes                      |
|                 | Attachment 23: Supplemental Human Resources Information Forms for Each Position on the Staffing Chart | Yes                      |
|                 | Attachment 24: Teacher Evaluation Tool(s)   | Yes                      |
|                 | Attachment 25: Proposed School Calendar (Annual)  | Yes                      |
|                 | Attachment 26: Proposed School Schedule for Day and Week: Teacher and Student Versions                | Yes                      |
|                 | Attachment 27: Proposed Admissions and Enrollment Policy  | Yes                      |

| <b>Sections</b>    | <b>Required Elements</b>                                | <b>Complete<br/>(yes/no)</b> |
|--------------------|---|------------------------------|
| Attachments        | Attachment 28: Certificate of Occupancy for Facility    | Yes                          |
|                    | Attachment 29: Evidence that Facility Has Been Secured  | Yes                          |
|                    | Attachment 30: Detailed Start-Up Plan                   | Yes                          |
|                    | Attachment 31: Financial Plan Workbook                  | Yes                          |
|                    | Attachment 32: Budget Narrative                         | Yes                          |
|                    | Attachment 33: Evidence of Other Financial Support      | Yes                          |
|                    | Attachment 34: Audit Report                             | Yes                          |
|                    | Attachment 35: Credit Report                            | Yes                          |
|                    | Attachment 36: IRS Form 990, Form 990-N, or Form 990-EZ | Yes                          |
|                    | Attachment 37: Plan for Insurance Coverage              | Yes                          |
| Special Assurances | Special Assurances                                      | Yes                          |
| CMO Addendum       | CMO Addendum (if applicable)                            | NA                           |



# Applicant Cover Sheet

|   |   |
|---|---|
| <b>NAME OF PROPOSED GENERATION TWENTY-FIVE CHARTER SCHOOL</b> |   |
| Cato Classical Academy  |   |
| <b>NAME OF SPONSORING ENTITY</b>                              |   |
| Classical Schools of Texas, Inc.                              |   |
| <b>The sponsoring entity is a:</b>                            | <input checked="" type="checkbox"/> 501(c)(3) Nonprofit Organization <input type="checkbox"/> Governmental Entity<br><input type="checkbox"/> College or University |

1. As **Attachment 1 and 2**, submit Articles of Incorporation for the sponsoring entity and proof of non-profit status and tax-exempt status, as applicable.
2. Does the school intend to contract with a third-party service provider (CMO) to manage the educational program and operations?

Yes\* ☐      No ☒      If yes, identify the CMO: \_\_\_\_\_

\* If the answer is yes, the applicant must complete the CMO Addendum.

## I. PRIMARY CONTACTS

|                 | Applicant Team Lead                           | Proposed Superintendent                       | Proposed Board Chair                          |
|-----------------|---|---|---|
| Name            | Joe Higgins                                   | Joe Higgins                                   | Dr. Nick Ellen                                |
| Mailing address | 7918 E Broadway, Ste #106 – Pearland TX 77581 | 7918 E Broadway, Ste #106 – Pearland TX 77581 | 7918 E Broadway, Ste #106 – Pearland TX 77581 |
| Email address   | info@catoacademytexas.org                     | info@catoacademytexas.org                     | nvellen@sbell.net                             |
| Phone number    | 520-631-7400                                  | 520-631-7400                                  | 832-215-0123                                  |

3. As **Attachment 3**, submit the information session registration form to document that at least one governing board member from the sponsoring entity attended the session.

## II. CHARTER SCHOOL INFORMATION

|   |              |
|---|--------------|
| <b>Grade level(s) served in Year 1</b>                | Kinder – 6th |
| <b>Number of students served in Year 1</b>            | 306          |
| <b>Grade levels served at capacity</b>                | Kinder – 8th |
| <b>Number of students served at capacity</b>          | 696          |
| <b>Number of campuses requested</b>                   | One          |
| <b>Number of districts within geographic boundary</b> | Three        |

*Note:* The information in this table should align with the data in the Targeted Community and Anticipated Student Population section of the application.

|  |
|--|
| <b>Address of Proposed Administrative Offices (if different from above):</b>   |
| (Same as above)  |
| <b>Physical Address of Each Proposed Campus (please include street address, city, state, zip, and county). If the specific address is unknown at this time, please provide the county and general location of the proposed campus:</b> |
| Hughes Ranch Rd and Country Place Parkway – Pearland Texas Brazoria County, with portions extending into Fort Bend and Harris counties   |

## III. GOVERNANCE/LEADERSHIP

|   |                    |
|---|--------------------|
| <b>Number of Board Members</b>                          | 4                  |
| <b>Chairperson of the Governing Board</b>               | Dr. Nicholas Ellen |
| <b>Chief Executive Officer of the Sponsoring Entity</b> | NA                 |
| <b>Superintendent of Proposed Charter School</b>        | Joe Higgins        |
| <b>Board Member Who Attended Applicant Conference</b>   | Dr. Nicholas Ellen |

*Note:* The information in this table should align with the list of board members in the Board Structure and Qualifications section of the application.

## IV. APPLICATION TEAM MEMBERS

4. For all members of the applicant team, list their names, current position, and position or role in the proposed charter school. (Add additional rows as needed.)

| <b>Full Name</b>   | <b>Current Job Title and Employer</b>          | <b>Position or Role with Proposed Charter School</b> |
|--------------------|--|--|
| Dr. Nicholas Ellen | Senior Professor – College of Biblical Studies | Board Chair  |



|                  |   |                       |
|------------------|---|-----------------------|
| Jignesh Derasari | VP Global Sales, Peaxy Inc.                       | Treasurer - Secretary |
| Renee McGuire    | Principal - R West Development                    | Vice Chair            |
| Jill Shockley    | Enrichment Director – Forgotten Angels Foundation | Board Member          |

5. Identify any individual(s) or organization(s) that prepared, assisted, and/or provided **professional** advice on the contents of the application herein.

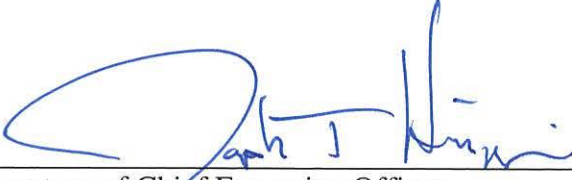
| Name of individual or organization | Was this individual/organization paid?  |  |
|------------------------------------|---|--|
| Joe Higgins                        | Yes <input type="checkbox"/>            | No <input checked="" type="checkbox"/> |
| Texas Charter School Association   | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/>            |
| Joe Hoffer – Attorney At Law       | Yes <input type="checkbox"/>            | No <input type="checkbox"/>            |

### **Attachments**

- 1: Articles of Incorporation
- 2: 501(c)(3) determination letter
- 3: Applicant information session documentation

**I certify that I have not made material changes, alterations, or edits to this *Responses and Attachments* document, unless expressly authorized in the specific directions provided.**

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate, realizing that any misrepresentation could result in disqualification from the application process or revocation after award. In accordance with Texas Education Code §12.120, I further certify that no members of the governing body of the sponsoring entity or of the proposed charter school or any officers or employees of the proposed school have been convicted of a misdemeanor involving moral turpitude or of any felony. I understand that incomplete applications will not be considered. As part of the application submission process, I certify that I have read and reviewed the Generation Twenty-Five Open-Enrollment Charter Application Instructions document.

|   |                  |                                   |
|---|------------------|-----------------------------------|
| <br>Signature of Chief Executive Officer<br>of Sponsoring Entity ( <i>Blue Ink</i> ) | 1/3/2020<br>Date | Joseph T. Higgins<br>Printed Name |
|---|------------------|-----------------------------------|

**IV. APPLICATION TEAM MEMBERS**

4. For all members of the applicant team, list their names, current position, and position or role in the proposed charter school. (*Add additional rows as needed.*)

| Full Name          | Current Job Title and Employer                    | Position or Role with Proposed Charter School |
|--------------------|---|---|
| Dr. Nicholas Ellen | Senior Professor – College of Biblical Studies    | Board Chair                                   |
| Jignesh Derasari   | VP Global Sales, Peaxy Inc.                       | Treasurer - Secretary                         |
| Renee McGuire      | Principal - R West Development                    | Vice Chair                                    |
| Jill Shockley      | Enrichment Director – Forgotten Angels Foundation | Board Member                                  |

5. Identify any individual(s) or organization(s) that prepared, assisted, and/or provided **professional** advice on the contents of the application herein.

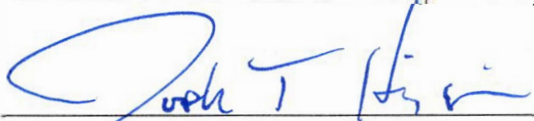
| Name of individual or organization | Was this individual/organization paid? |                             |
|------------------------------------|--|-----------------------------|
| Joe Higgins                        | Yes <input type="checkbox"/>           | No x                        |
| Texas Charter School Association   | Yes x                                  | No <input type="checkbox"/> |
| Joe Hoffer – Attorney At Law       | Yes x                                  | No <input type="checkbox"/> |
| Amanda List – A List Consulting    | Yes x                                  | No <input type="checkbox"/> |

**Attachments**

- 1: Articles of Incorporation
- 2: 501(c)(3) determination letter
- 3: Applicant information session documentation

**I certify that I have not made material changes, alterations, or edits to this Responses and Attachments document, unless expressly authorized in the specific directions provided.**

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate, realizing that any misrepresentation could result in disqualification from the application process or revocation after award. In accordance with Texas Education Code §12.120, I further certify that no members of the governing body of the sponsoring entity or of the proposed charter school or any officers or employees of the proposed school have been convicted of a misdemeanor involving moral turpitude or of any felony. I understand that incomplete applications will not be considered. As part of the application submission process, I certify that I have read and reviewed the Generation Twenty-Five Open-Enrollment Charter Application Instructions document.

  
Signature of Chief Executive Officer  
of Sponsoring Entity (*Blue Ink*)

2/15/2020  
Date

Joseph T. Higgins  
Printed Name



# School Overview

## Executive Summary

**Proposed Community:** The Governing Board of Cato Classical Academy intends to serve the Alvin, Pearland and South Houston areas with a campus located in western Pearland. The school will be the only Texas approved charter school within an 8 mile radius to the north and 12 miles to the west and 20+ miles to the east or south. The Pearland/Alvin/S Houston area is in need of options for parents looking for a rigorous, K8 school with a focus on Social Emotional Learning. The founding board has a long history in Alvin/Pearland area and accurately represents to characteristics of the community. The school will be a new construction campus ranging from 40,000 to 45,000 square feet with a full gym, theater, music and arts program and playground. All integral parts of our program. The intention is to open as a Kinder to 6<sup>th</sup> grade campus and then grow up to 8<sup>th</sup> grade by the third year or sooner of operation.

The Cato Governing Board is proposing one campus with a planned opening date of August of 2021 and a full capacity of 696 scholars. The school is proposing to build a new campus on a 6 acre site with a full gym, theater, state of the art security, play fields and specialty classes for SPED students and science/art facilities.

**School Specifics** The school will be named, Cato Classical Academy. The choice in the name refers to the ancient Roman emperor Cato who stood up for the Roman Republic in the wave of popular support for what ailed Rome.

The founding fathers of the United States emulated Cato's principals of Stoicism and the noble responsibility of leadership. George Washington, Ben Franklin, John Adams, and Samuel Adams were all honored in their time as "the American Cato". Cato was an ardent follower of the Stoic philosophy and modeled for many of the founder's honor, virtue, and leadership by example as well as a personal commitment to something bigger than yourself. The Governing Board of Classical Schools of Texas choose their name because it emulates what they intend to model in the classrooms, hallways, athletic fields of their school and they believe a firm understanding of history and American civics prepares citizens for their responsibility of self governing.

**Leadership Team Expertise:** The Cato Academy Governing Board is made up of five local area members, each of which represents the Pearland community. The group hired and relocated to Texas, **Joe Higgins as the Superintendent**. Mr. Higgins was the founding Superintendent/CEO of a Classical charter school group with locations in Arizona and Colorado. In 2018, Joe left the position after opening 6 campuses in with a staff of 425 and 4500 students enrolled. **Dr. Nick Ellen**, (Board Chair) a long term Senior Professor at The College of Biblical Studies as well as with Bob Jones University. Dr. Ellen is the Senior Pastor at Community of Faith Bible Church, all in Houston. Dr. Ellen is opening a new church located in Pearland with a target open date of summer of 2020. Dr. Ellen is an author 8 books on marriage, family and Biblical Counseling. **Renee McGuire**, a long term resident of Pearland and active member of the business and political landscape of south Houston. Mrs. McGuire was the founding director and served for 9 years of the non-profit, Forgotten Angels. Mrs. McGuire now supports the Forgotten Angels Foundation that operates a full service café and thrift store, among other fundraising ventures to support the special needs adult population in Pearland, Alvin and south Houston. **Jignesh Derasari**, who is a Pearland resident who served as CEO in India, Australia and America for Oil and Gas, data analytics firms, and private equity groups who work in the oil

Generation 25: <<Cato Classical Academy>>



and gas, heavy construction, healthcare and real estate markets. **Jill Shockley** – worked for a decade in the Alief ISD in the speech and hearing areas of special education. She now works with Forgotten Angels Foundation assisting their special needs population.

**Classical Model and Need In The Region:** The geographic region is growing rapidly. Alvin ISD has seen tremendous growth: (AlvinISD.net)

*“In the last decade, the Alvin/Manvel/Pearland region has experienced many changes in light of rapid residential and economic growth in the area.. It is expected that within five years, Alvin ISD will welcome more than 5,088 additional students, which will increase total enrollment from the current 22,030, to nearly 27,000. Looking at the elementary grades alone, Alvin ISD should continue to add close to 500 students each year for the foreseeable future with the strongest growth being felt on campuses in the western portion of the district.”*

A recent bond package, approved by Alvin residents helped with for capacity issues but the influx of new residents is ongoing. In Pearland ISD, the district has seen growth from 2011 to 2016 of 12.4% and is projected to see continued strong growth over the next decade. The pressure for facilities and options to address the growing community create an opportunity for Cato Academy. Houston ISD is within the proposed enrollment boundary and there schools in the enrollment area with D or below grades.

**Whole School – Community School Model** - The campus will be inclusive with opportunities to engage all populations in rigorous academics, intentioned social emotional learning and focused culture building exercises (see the Cato House System, sports participation, after school programming, theater and performance). The CDC model of Whole Child, Whole Community and Whole School uniquely fits the Cato Academy model.

**Education Philosophy:** The proposed school will be built around the Classical Education pedagogy and include hands on, student centered learning as modeled by 18<sup>th</sup> century educator, Charlotte Mason. The Governing board is committed to build a school with the following framework as a guide:

- An environment where teachers, support staff, and administrators lead by example and model what is good, true and beautiful. Our campus will work to foster meaningful student-faculty-parent interaction, in alignment with the Adlerian philosophies of Dr. Rudolf Druikers and Dr. William Glasser which focus on the power of relationships.
- A time tested, standards aligned curriculum that is designed to the needs, strengths, abilities, and learning style of each student to maximize student achievement;
- An environment reinforcing the Charlotte Mason philosophy that every individual has a unique potential that can be developed, while understanding that not every student can be successful all of the time;
- An open and receptive learning atmosphere that respects and encourages the individual ideas and intellectual pursuits of every student and faculty member;
- Instructors that receive continuing education on the delivery, planning, academic and emotional benefits of a Classical education.

The Cato Classical Academy, Governing Board believes in the merits of a Classical Education program with a focus on rigor, character education and high expectations. During their organizational and planning meetings, the board identified the Pearland area as an opportunity to open a school that serves families at all levels of the socioeconomic spectrum. The team has retained a Superintendent and built a team that can execute on Academic, Financial and Operational performance measures put forth by the State of Texas.



## Targeted Community and Anticipated Student Population

|  |   |
|--|---|
| <p><b>Optional Priority Point.</b> Does the applicant propose a campus within the boundaries of the attendance zone of a campus assigned an unacceptable performance rating for the past two years?</p> <p>By checking yes, applicant must cite clear and specific evidence to support this claim.</p> | <p>Yes <input checked="" type="checkbox"/></p> <p>No <input type="checkbox"/></p> |
|--|---|

The Cato Academy Governing Board is proposing one campus to be located in North East Pearland with easy access from Alvin and south Houston. With an identified property near the intersection of Highway 288 and the Sam Houston Toll way, the ease of access for families in a 5 to 8 mile radius will be a unique feature when choosing the school. The general geographic area has performing public schools but rapid growth and no choice options for families looking for a community school model. The Governing Board is proposing one school with measured enrollment projections. They feel that starting with a single campus allows the school culture and norms to be set in a measured process. The power of the school rests on the power of relationships. The relationships between student to teacher, teacher and families and among the teaching and administration teams take time to model and form. The financing and construction plan allows for slow ramp up and flexibility to meet strong or measured enrollment projections.

**One Campus – Location Rational** The Cato Academy Governing board is proposing one campus for opening in August of 2021. The board believes that the geographic boundaries identified as the Houston ISD (south) Pearland ISD and Alvin ISD is ideal for the model being proposed. The rational for the location and the model include: 1. There are very few if any public school choices for the families of the proposed school. 2. The focus on academic rigor and social emotional learning found in the Classical Education model matches the unique aspects of the area. 3. A public charter K8 school with an experienced team in the area of Special Education who will focus on scholars with IEP's extra needs. 4. The efficacy of Latin instruction on ELL scholars will help the subpopulation achieve academic success. 5. The Governing board is proposing a slow ramp up and growth in enrollment and is being conservative in their estimates for the first three years. 6. The region is growing rapidly with a ballooning from 125,198 to an additional 50% growth or 60,000 residents by 2040. As parents come to the region, choices in schools will become an important draw to the region.<sup>1</sup>

The team does not anticipate any non-academic challenges in executing on their model.

Offering a choice to the families in the geographic area is the goal of the Cato Governing Board. The school choices in the area include expensive private schools or local ISD options. The community is interested in an option that provides the private school experience with academic rigor, a focus on character development combined with a community school model. With the background of the Governing Board and the identified need with high special needs populations, the combined model of public K8 charter and special education service provider. English Language Learners, arts and a robust after school program

---

<sup>1</sup> A. Jones. Pearland noted among fast-growing cities

1/4/17 Houston Chronicle - <https://www.chron.com/neighborhood/pearland/news/article/Pearland-noted-among-fast-growing-cities-10834497.php>

## Geographic Boundaries

State the proposed school's **attendance boundary** by providing an alphabetical list of the traditional school districts from which the proposed charter school will accept students. If the charter school will accept students from only a portion of a school district or districts, state exactly what the boundary will be. *Do not list the charter schools located within the designated geographic boundary.*

A **primary attendance boundary** is a subset of school districts within the approved attendance boundary. The proposed charter may admit students who reside outside of the primary boundary once all eligible applicants who reside within the primary attendance boundary have submitted a timely application and have been enrolled per 19 Texas Administrative Code §100.1207(f).

If the proposed charter school will have a primary attendance boundary, list all school district(s) that will establish the boundary. **Do not list the charter schools located within the designated geographic boundary.**

| <b>Attendance Boundary</b>   | <b>Primary Attendance Boundary (if applicable)</b> |
|--|--|
| Alvin ISD  | Alvin ISD  |
| Pearland ISD   | Pearland ISD                                       |
| Houston ISD (individual schools: Almeda EL, Law EL, Woodson School, Codwell EL, Thomas Middle, Mitchell EL, Deanda El, Peterson EL, Reynolds EL) | Houston ISD  |

|  |  |
|--|--|
| <b>Number of charter school campuses currently operating within the occupied district:</b>     | 0 Alvin ISD<br>1 Pearland ISD<br>4 Houston ISD (8 mile radius)   |
| <b>Number of traditional school campuses currently operating within the occupied district:</b> | 7 middle (Alvin ISD)<br>18 elementary (Alvin ISD)<br>5 middle (Pearland ISD)<br>14 elementary (Pearland ISD)<br>1 middle (Houston ISD)<br>8 elementary (Houston ISD) |
| <b>Number of traditional school districts within ten miles of the proposed location:</b>       | 8 traditional school districts<br>Pearland ISD<br>Alvin ISD  |



|  |  |
|--|--|
|  | Houston ISD<br>Pasadena ISD<br>Friendswood ISD<br>Clear Creek ISD<br>Santa Fe ISD<br>Fort Bend ISD |
|--|--|

|  |  |
|--|--|
| <b>Will the proposed school be located in the attendance zone of a campus assigned an unacceptable performance rating under Texas Education Code § 39.054 for the past two school years?</b> | Yes x      No <input type="checkbox"/>     |
| <b>School Name(s):</b>   | Thomas Middle School – Reynolds Elementary |

**Charter schools located within an 8 mile radius:** Horizona Montessori (K8 - Pearland – Academic Rating B), IL Houston Windmill (6<sup>th</sup>-8<sup>th</sup> -S Houston – Academic Rating B), TheVarnett School SE (K-7<sup>th</sup> -S Houston – Academic Rating F), KIPP Zenith Academy (PK-4<sup>th</sup> – S Houston – Academic Rating B), Pro Vision (3<sup>rd</sup> – 8<sup>th</sup> S Houston – Academic Rating D).

### Enrollment Projections

|   |                                      |
|---|--------------------------------------|
| 1. Applicant proposes to open only <b>ONE</b> campus by Year 5?   | Yes x<br>No <input type="checkbox"/> |
| 2. Applicant proposes to open <b>MULTIPLE</b> campuses by Year 5? | Yes <input type="checkbox"/><br>No x |

**Enrollment Summary Table:** Complete the following table for the charter school (not each campus), marking any grades not to be served with an “x”. This table should be aligned with the Financial Plan Workbook.

| Grade Level | Projected Number of Students |        |        |        |        |             |
|-------------|------------------------------|--------|--------|--------|--------|-------------|
|             | Year 1                       | Year 2 | Year 3 | Year 4 | Year 5 | At capacity |
| EE3         |                              |        |        |        |        |             |
| PK 4        |                              |        |        |        |        |             |
| K           | 52                           | 72     | 72     | 72     | 72     | 72          |
| 1           | 52                           | 72     | 72     | 78     | 78     | 78          |
| 2           | 52                           | 65     | 75     | 78     | 78     | 78          |
| 3           | 52                           | 60     | 75     | 78     | 78     | 78          |
| 4           | 35                           | 60     | 75     | 78     | 78     | 78          |
| 5           | 36                           | 52     | 75     | 78     | 78     | 78          |
| 6           | 26                           | 52     | 75     | 78     | 78     | 78          |



|  |      |       |     |      |      |      |
|--|------|-------|-----|------|------|------|
| 7  |      | 52    | 65  | 78   | 78   | 78   |
| 8  |      |       | 65  | 78   | 78   | 78   |
| 9  |      |       |     |      |      |      |
| 10   |      |       |     |      |      |      |
| 11   |      |       |     |      |      |      |
| 12   |      |       |     |      |      |      |
| Total enrollment                             | 306  | 485   | 649 | 696  | 696  | 696  |
| For the projections below, specify by campus |      |       |     |      |      |      |
| Students per classroom                       | 23.5 | 23.09 | 24  | 25.7 | 25.7 | 25.7 |
| Number of classrooms                         | 13   | 21    | 27  | 27   | 27   | 27   |

### Demographic Projections

Provide the anticipated demographics (as percentages) for the first proposed charter campus as well as current demographics for the Occupied District and two Contiguous Districts.

**NOTE:** The term Occupied District refers to the traditional school district in which the first proposed charter campus will be located. Contiguous District 1 and 2 must be contiguous to the school district in which the first proposed charter campus will be located.

|                                   | <b>First Proposed<br/>Charter<br/>Campus</b> | <b>Occupied<br/>District</b> | <b>Contiguous<br/>District 1</b> | <b>Contiguous<br/>District 2</b> |
|-----------------------------------|--|------------------------------|----------------------------------|----------------------------------|
| <b>Name</b>                       | Cato Academy                                 | Pearland ISD                 | Alvin ISD                        | Houston ISD                      |
| <b>African-American</b>           | 18%  | 15%                          | 20%                              | 24%                              |
| <b>Hispanic</b>                   | 42%  | 33.5%                        | 40.5%                            | 61.7%                            |
| <b>White</b>                      | 22%  | 36.5%                        | 27.4%                            | 8.8%                             |
| <b>American Indian</b>            | .04%   | .04%                         | .04%                             | .02%                             |
| <b>Asian</b>                      | 10%  | 11.1%                        | 9.4%                             | 4%                               |
| <b>Pacific Islander</b>           | .01%   | .01%                         | .01%                             | .01%                             |
| <b>Two or More Races</b>          | 2.2%   | 3.3%                         | 2.3%                             | 1.1%                             |
| <b>Economically Disadvantaged</b> | 55%  | 26.8%                        | 47.1%                            | 75%                              |
| <b>English Learners</b>           | 17%  | 9.5%                         | 16.7%                            | 32.4%                            |
| <b>At-Risk</b>                    | 52%  | 30.5%                        | 46.4%                            | 71.7%                            |
| <b>Gifted/Talented</b>            | 10%  | 9%                           | 7.1%                             | 15.8%                            |
| <b>Special Education</b>          | 8.9%   | 8.9%                         | 9.9%                             | 7.1%                             |

## Community Engagement

Enter narrative response to the prompts in this section of the application. *Reference Attachments 4-6 in the response.*

The driving force behind the effort to located Cato Academy in the Alvin/Pearland area was long-time resident of the area, Renee McGuire. Her work in the business and non-profit community prompted her to build a governing board of like-minded leaders with varied racial, cultural and skillsets that could make the proposed charter school a success. Mrs. McGuire has an extensive background in special needs adult populations and wanted to be a part of a school that services the special needs populations to their highest ability as well as a focus on family relationships, character development, and social-emotional learning. The Classical Education model matched what the Governing Boards' vision was. She embarked on finding expertise and leadership in the Classical Education charter arena and visited and eventually hired, Mr. Joe Higgins to be the Superintendent of the new school. He has a proven background and aligned with the Governing Boards vision of what the proposed school will focus on.

During the community outreach period, the group held a number of planning meetings to develop the Mission Statement, Values Statements and determine what type of school to launch. In speaking with parents, families, pastors, business members of the area and community leaders the Governing Board determined there was sufficient demand for the proposed school.

With the addition of Mr. Higgins, a number of community listening and feedback meetings including presentations, meetings and listening sessions with Representative Ed Thompson – Texas Legislature, Carol Artz-Bucek, President and CEO of The Pearland Chamber of Commerce, Dr. John Kelly, Superintendent of Pearland ISD, Amy Bowman Director, Tottenberrys Early Education, Sharon D Baker, Director Back to Basics Pearland, Cynthia Chambers, Center Director, R Kids Learning Academy, Melissa Bagwell, Center Director, Kidde Academy of Pearland, Katie Boughal, Park Naturalist and Education Coordinator for the Delores Fenwick Nature Center, Pearland Parks, and Recreation Department. Jason Omara, Resource Development Manager (Sponsorship Opportunities), City of Pearland. Mychal Mitchell, Special Events Coordinator, City of Pearland. Kyle Livesay, Recreation Program Manager Pearland Parks and Recreation. Pearland Alvin Rotary Club. E Richard Vaughan Rd. Vaughn Interests.

Plan For Community Outreach: Partnering with parents is part of the Mission Statement of Cato Academy and engaging with families has already begun and will ramp up after approval of the charter and the set of the opening date (August 2021 depending on local zoning).

Beginning in September of 2020 through to school opening the objective of the Superintendent, Governing Board, and early hired staff will be to implement a program to engage the community in the new school. Our strategic plan for enrollment includes an aggressive budget of \$70,000 for traditional marketing and advertising. The effectiveness of this effort will be a series of 'call to action' events and open houses held at local community spaces to present the school model, answer questions and begin the enrollment process. The Superintendent has launched schools in four markets in the past and uniquely understands the process of gaining traction, telling the school stories and finding early adopters to help the outreach efforts. During the year-long enrollment and marketing period, all efforts will be tailored towards; 1. Listening to the community and address any unforeseen needs. 2. Engaging



the families, businesses and civic organizations/churches in spreading the word of the school. Special focus will be placed on area preschools. All of which have been visited and the idea of Cato Academy has been introduced during the planning and charter drafting period.

From prior experience, the initial focus will be on finding and building relationships with early adaptor parents that can help organize and extend the reach of the school leadership team. This early parent team will become the beginning PTA and have proven invaluable with organizing volunteers and understanding the pulse of the local parent community.

The team will look to set up tables or events at the area Preschools, and at high traffic businesses and at local community events that are occurring in the target areas. Presentations at MOPS Clubs, youth athletics teams and area Boy and Girl Scouts will be part of the early outreach. The outreach will include setting up tables at libraries, supermarkets, churches, and youth sports events. In meeting with the local Pearland Chamber of Commerce, we were given an annual of lists which we can participate in as well as events at the Alvin/Manvel Chamber of Commerce and the Brazoria County Hispanic Chamber of Commerce, Houston Hispanic Chamber of Commerce.

Board Members McGuire and Ellen and Schockley are active members of the faith-based community and have and will continue to reach out to some of the 163 plus pastors from various areas congregations and denominations. Board Member Derasari is a member of the Indian community and will facilitate outreach within that community.

Meetings with and Outreach to - local Head Starts, Day Cares, Pre-K, Clubs programs: The Lead Founder is currently establishing relationships with these. Presentations at local daycare centers, Head Start clubs and private preschools will all help build the demand for the new school. The Superintendent has met with the executive directors of a number of these faculties in the target area and each has unique ways to engage their parents. Many of these programs have after school services and will pick up scholars at Cato Academy and were very interested in partnering with our school. The Superintendent has identified a number of tutoring, music, karate, and special needs vendors in the local area that many have expressed an interest in partnering with the school.

Meetings with and Outreach to – Parks and Rec: The Pearland/Alvin area Parks and Recreation departments are active and have a number of events in and around the area. Introductory meetings and information meetings have been conducted during the charter drafting phase (see Outreach and Public Meetings) and once approved the leadership team will continue to partner with local community groups to solicit feedback and build demand.

Social Media: All events will be publicized on social media and via email. A consistent social media campaign has been budgeted for and will be the hallmark of our communication efforts. Beginning in August of 2020, the team will post on social media at least once per week event updates, school hiring and construction progress, surveys asking families for feedback and monitoring of community questions. The social media program, to be effective will be a blend of organic activity and paid to boost of ads

The Marketing Campaign (detailed in Student Recruitment and Enrollment) will produce messages both digitally and in print both in English and Spanish to reach all families. The plan has a budget of \$70,000 and covers print, radio, outdoor, and social media.

School Open Houses: Starting in August of 2020, the leadership team will host two open houses per month. All marketing efforts will communicate these events and we have found them to be great ways to meet prospective parents and answer their particular questions. These events



will be scheduled during times that are convenient. Each event will have handouts of Frequently Asked Questions and materials where families can raise questions or offer feedback on our plan. All the information in Spanish and English. Sign up interest lists will be an important part of building our communication list.

Communication with School District Leaders and Members of the Texas Legislature:

Mrs. McGuire and Mr. Higgins met with Representative Ed Thompson, District 29 (Pearland/Alvin area) Texas State Representative to share the vision for the school and solicit feedback. The details of the proposed camps, model, families that we propose to serve and focus on social and emotional learning was discussed. Mr. Higgins and Mrs. McGuire met with Superintendent of Pearland ISD, Dr. John Kelly. At the meeting, we discussed the proposed location the Classical Education model and issues in the area surrounding special education needs and opportunities.

During the planning and drafting period of the application, the team put together a marketing outreach program which involved: Social Media marketing, web site design, marketing materials in English and Spanish and two open houses in the Alvin/Pearland/South Houston area on December 5<sup>th</sup> and December 7<sup>th</sup> at New Harvest Christian Fellowship. The ad campaign was targeted to parents with PreSchoolers (age 3 to 5), parents with early age school children (age 6 to 8) and parents with Preteens (9 to 12). The social media campaign reached 14,140 people with 55,349 impressions. The campaign yielded 26 event respondents and



**CATO ACADEMY**

ESCUELA PÚBLICA GRATUITA - EDUCACIÓN CLÁSICA

**SESIONES INFORMATIVAS**

JUEVES 5 DE DICIEMBRE • 6:30-7:30PM  
SÁBADO 7 DE DICIEMBRE • 9:30-10:30AM

NEW HARVEST CHRISTIAN FELLOWSHIP  
12216 BROADWAY ST. | PEARLAND, TX 77584

La misión de Cato Classical Academy es proporcionar una población académica diversa con una base educativa para el éxito. Lo académico se mezcla con los principios de una vida virtuosa, el aprendizaje tradicional y la responsabilidad cívica. Preguntas? Email [Info@CatoAcademyTexas.org](mailto:Info@CatoAcademyTexas.org)

**K-8TH APERTURA OTOÑO 2021 • VISITE [CATOACADEMYTEXAS.ORG](http://CATOACADEMYTEXAS.ORG)**

RIGOR | VALORES Y VIRTUDES | ATLETISMO | UNIFORMES | COLABORACIÓN CON LOS PADRES



**CATO ACADEMY**

FREE PUBLIC CHARTER SCHOOL - CLASSICAL EDUCATION

**INFORMATION SESSIONS**

THURSDAY, DECEMBER 5 • 6:30-7:30PM  
SATURDAY, DECEMBER 7 • 9:30-10:30AM

NEW HARVEST CHRISTIAN FELLOWSHIP  
12216 BROADWAY ST. | PEARLAND, TX 77584

Cato Classical Academy's mission is to provide a diverse scholar population with an educational foundation for success. Academics are blended with the principles of virtuous living, traditional learning, and civic responsibility. Questions? Email [Info@CatoAcademyTexas.org](mailto:Info@CatoAcademyTexas.org)

**K-8TH OPENING FALL 2021 • VISIT [CATOACADEMYTEXAS.ORG](http://CATOACADEMYTEXAS.ORG)**

RIGOR | VALUES AND VIRTUES | ATHLETICS | UNIFORMS | PARTNER WITH PARENTS

# School Design

## Mission, Vision, and Overview of School Design

**School's Mission:** At Cato Classical Academy our mission is to prepare a diverse scholar population with an educational foundation for success in life. Academics are blended with the principles of virtuous living, traditional learning, and civic responsibility. We believe relationships are the key to our success. We accomplish this by partnering with parents to provide a rigorous, time tested classical education. We strive to equip and train our teachers with academically excellent tools with the goal of instilling a lifelong love of learning in our scholars.

**School's Vision:** The vision of Cato Classical Academy is to hold our leaders, teachers, and students to the highest level of integrity and accountability. We model what we teach. We embed social emotional and character development in everything we do. We expect what we model. Our vision statement was formulated by reaching back into history and modeling the great thinkers and leaders on the character attributes that we look to teach and model in our schools: **Courage (Aristotle)** "Courage is the first of human qualities because it is the quality that guarantees the others." **Curiosity (Einstein)** "It is a miracle that curiosity survives formal education."

Curiosity, Makes the acquisition of knowledge and wisdom long-lasting. **Humility (Aquinas)** "Where there is humility, there is wisdom" **Gratitude (Cicero)** Gratitude is the parent of all other virtues – which allows us to seek what is Good, True and Beautiful. **Dignity (Mandela)** We respect the inherent value and worth of each person. **Justice (Gandhi)** Truth never damages a cause that is just. **Fortitude (Locke)** Fortitude is the guard and support of other virtues. Responsibility (Abraham Lincoln) You cannot escape the responsibility of tomorrow by evading it today." What matters is measured.

Dr. Ellen and Mrs. McGuire and Mr. Higgins composed a draft missions and vision statement that addressed the philosophies they believed would meet the needs of the Pearland/Alvin community and incorporate the essence of Classical Education. The preliminary Mission and Vision was shared with a number of area residents, business leaders and community members to solicit feedback and ensure the foundational goals were in alignment with the community. The feedback has been positive and suggestions were incorporated in early October and a final version of the mission and vision was established. The founding team met in November to discuss and approve the final vision and mission of the school. Dr. Nick Ellen, board chair and Renee McGuire, board member embarked, three years ago on providing a Classical education school option for the Pearland/Alvin area. Mrs. McGuire believed that her community was missing an option for parents that believed in character development and academic rigor found in Classical Education schools located in other areas of Texas. Mrs. McGuire is from Pearland and has been an active member of the community for her whole life. She has built a number of housing, commercial and non-profit entities in the area and uniquely knows what her community needs. Forgotten Angels was founded in 2001 and ran for a decade by Renee McGuire, to help friends who were struggling to find appropriate services for their adult children with disabilities. In 2011, Forgotten Angels Foundation partnered with Unified Care Group to provide foster care and Home and Community-based services. Today, Forgotten Angels Foundation provides over 20 residential homes in the areas specially designed homes and facilities, as well as recreational, educational, and vocational opportunities for more than 120 individuals with special needs. Her experience with adults with disabilities showed a need for



services in the elementary and middle school disabled student population. She sought out and visited, in 2016, a Classical Education school in Arizona and ultimately hired the Superintendent, Joe Higgins. Mr. Higgins was the founding leader and spent 5 years as Superintendent of the schools with campuses in Arizona and Colorado. Under his tenure the team built out the systems for a K8 Classical school network with 4500 scholars and 7 locations as well has a platform for the home school Classical Education market. Mr. Higgins was added to the team of Forgotten Angles Foundation in December of 2020, by Mrs. McGuire, to bring the expertise to the operation and to establishing a school in the Pearland area. He is moving to the Pearland area and will serve as Superintendent/CEO of the school and manage all aspects of early opening and operations. He will report directly to the Cato Classical Academy of Texas Governing Board and execute on their directives. In addition to launching and leading the Leman Academy charter schools in Arizona and Colorado, Mr. Higgins served on the board of a private prep high school for 13 years, and spent 2 years on the governing board of an alternative graduation charter in Arizona. He is on the governing board of Rockwood Prep a Phoenix based private, high needs special education schools. His background in systems, operations, and governance of a public charter schools and private special education schools will be important in bringing the vision together. He will function as the schools Superintendent, paid through the Forgotten Angels Foundation and be responsible for identifying a school Principal and helping to get the school approved, built and operating.

**Community Served – Unique Offering – Statement of Need** ELL Population: The Governing Board is committed to serving a diverse population within Houston/Pearland/Alvin and will enroll a student body that mirrors the demographics of the area. Cato Classical Academy specifically choose the location because of the concentration of at least 20% Hispanic or Romance Language (French, Spanish, Italian, Portuguese, and Romanian) or other ELL populations. Research out of Penn State Center for Language Science found that lessons in the Latin roots of words may help Spanish-speaking students who are learning English bridge the gap between the two languages.<sup>2</sup> Latin instruction is an integral part of the Cato Academy classical school. Using Latin to bridge the gap for ELL students is one more tool to address the growing Hispanic populations in south Houston area. Based on surrounding ISD information, the proposed school will have an ELL population of between 15 and 17%.

| <b>ISD Info</b> | Pearland<br>ISD | Alvin ISD    | Houston<br>ISD |
|-----------------|-----------------|--------------|----------------|
| ISD Enroll      | 21628           | 24852        | 213,528        |
| Hispanic        | 33.5%           | 40.5%        | 61.7%          |
| Black           | 15%             | 20%          | 24%            |
| ELL pop         | <b>9.5%</b>     | <b>16.7%</b> | <b>32.4%</b>   |
| IEP pop         | 8.9%            | 9.9%         | 7.1%           |

Rapid Growth In Target Area: From 2010 to 2017, Pearland ranked as the 10th fastest growing city in the U.S., compared to other cities with a population of 50,000 or more in 2010. By 2040, it is projected that Pearland will grow by another 60,000 residents, on top of the 125,198 current residents (2017). Houston is one of the most racially/ethnically diverse metropolitan areas in the nation. In fact, it is the most diverse of the 10 largest U.S. metropolitan

<sup>2</sup> Penn State. "Latin may help students bridge their native language with English." ScienceDaily. ScienceDaily, 4 October 2018. <[www.sciencedaily.com/releases/2018/10/181004110035.htm](http://www.sciencedaily.com/releases/2018/10/181004110035.htm)>



areas. And in 2012, Pearland surpassed Houston, as the region's second most diverse city. All U.S. Census-tracked ethnic groups within the community increased more than 50% from 2000 - 2016.<sup>1</sup>

**Key Programmatic Statement** Cato Academy looks create a schooling option that addresses why many parents are choosing to move to home schooling instead of traditional public school. In findings from the National Center for Education Statistics (NCES) conducts its National Household Education Survey (NHES) every four years, the 2016 report found most common reason parents gave dissatisfaction with their school and desire for other options included a concern about the environment of other schools (80%). Almost two-thirds of parents cited dissatisfaction with academic instruction at other schools (61%). Large numbers of parents also indicated that they were looking for other options that provide to provide moral (67%) or religious (51%) instruction or in order to provide a nontraditional approach to a child's education (39%). Comparatively fewer parents cited physical or mental health problems (14%), special needs (20%), or temporary illness (4%).<sup>2</sup> As detailed in this application, Cato Academy is an important option to address diverse parental needs. Cato Classical Academy is built on the time tested Classical education model which match a parents need for academic rigor and a focus on Social and Emotional Learning or Whole Child education. There are NO Classical options, and no school choice options from charter schools within a 8 to 20 mile radius of our proposed geographic area. The Cato Classical Academy is Classical, among other characteristics because it follows the learning mode laid out in the Trivium of learning but unique in its philosophy and execution.

**Cato and Classical Education:** "Classical education depends on a three-part process of training the mind. The early years of school are spent in absorbing facts, systematically laying the foundations for advanced study. In the middle grades, students learn to think through arguments. In the high school years, they learn to express themselves. This classical pattern is called the *Trivium*. A classical education is more than simply a pattern of learning, though. Classical education is language-focused; learning is accomplished through words, written and spoken, rather than through images (pictures, videos, and television). Why is this important? Language-learning and image-learning require very different habits of thought. Language requires the mind to work harder; in reading, the brain is forced to translate a symbol (words on the page) into a concept. Images, such as those on videos and television, allow the mind to be passive. In front of a video screen, the brain can "sit back" and relax; faced with the written page, the mind is required to roll its sleeves up and get back to work."<sup>3</sup> The first eight years of education consist of two repetitions of the same four-year pattern: Ancients, Middle Ages to Reformation, Founding of America and Modern Times. In a traditional Classical Model, the child studies these four time periods at varying levels — simple for grades 1-4, more difficult in grades 5-8 (when the student begins to read original sources), when the student works through these time and also has the opportunity to pursue a particular interest (music, dance, technology, medicine, biology, creative writing) in depth. This pattern lends coherence to the study of history, science, and literature — subjects that are too often fragmented and confusing. The pattern widens and deepens as the student progresses in maturity and learning. The classical

---

<sup>1</sup> <http://www.pearlandede.com/Information-Center/Demographics.aspx>

<sup>2</sup> Parent and Family Involvement in Education: Results from the National Household Education Surveys Program of 2016. M McQuiggan Mahi-Megra. 2016. IES, National Center for Educational Statistics.

<sup>3</sup> *What Is Classical Education* by Susan Wise Bauer [www.TheWellTrainedMind.com](http://www.TheWellTrainedMind.com) <https://welltrainedmind.com/a/classical-education>



education is, above all, systematic — in direct contrast to the scattered, unorganized nature of so much secondary education. This systematic, rigorous study has two purposes.<sup>4</sup>

**Cato Classical Academy and Charlotte Mason Influence:** Cato Classical Academy blends the traditional Classical pedagogy with the influences of Charlotte Mason. Charlotte Mason was a classical English educator in England at the turn of the twentieth century. She proposed to base the education of children upon a wide and liberal curriculum. Mason's philosophy of education is best summarized by two key mottos found in her writings as "Education is an atmosphere, a discipline, a life" and "Education is the science of relations." Mason believed that children were born persons and should be respected as such; they should also be taught the Way of the Will and the Way of Reason. Her motto for students was "I am, I can, I ought, I will." Mason placed great emphasis on the reading of high-quality literature, and coined the phrase "living books" to denote those writings that "spark the imagination of the child through the subject matter." Mason placed great emphasis on the reading of high-quality literature, and coined the phrase "living books" to denote those writings that "spark the imagination of the child through the subject matter."<sup>5</sup> A Charlotte Mason and Classical blended model is much more hands on and student centered. Science focuses on nature studies, narration is an important component of our English program and art and music are actively engaging subjects that hold high prominence in our schools.

**Cato Classical Academy and Relationships** The foundations of the Cato Classical Academy culture is based on research by Dr. Rudolf Dreickurs an Adlerian psychologist who's life work who suggested that human misbehavior is the result of feeling a lack of belonging to one's social group. When this happens the child acts from one of four "mistaken goals": undue attention, power, revenge or avoidance (inadequacy). Dreickurs' overall goal was that students would learn to cooperate reasonably without being penalized or rewarded because they would feel that they are valuable contributors to the classroom.<sup>6</sup> This simple theory is the basis for student success and the root of discipline issues in a school. The power of relationships between the teacher and the scholar is the foundation of academic and life success of the scholar. To simplify the theory the Teddy Roosevelt quote; 'People won't **care** how much **you know until they know** how much **you care**.' opens the door to learning and is modeled in all aspects of Cato Academy.

Continuing with Dr. Dreickur's theory, Dr. William Glasser laid out Choice Theory<sup>7</sup> which is the idea that the behavior of children is related to five basic needs; survival, love and belonging, power and significance, freedom and autonomy, and fun. Both Dreickurs and Glasser offer concrete techniques to be employed in the classroom to manage discipline issues and set the classroom up for a year of success. Dr. Dreickurs 1. Always Speak in positive terms, never be negative 2. Encourage students to strive for improvement, not perfection 3. Emphasize student strengths while minimizing weaknesses. 4. Help students learn from mistakes, which are valuable in learning 5. Encourage independence and the assumption of responsibility 6. Encourage students to help each other 7. Be optimistic and enthusiastic – a positive outlook is contagious. Dr. Glasser and Choice Theory 1. Stress Student Responsibility 2. Set Classroom Rules 3. Accept NO EXCUSES 4. Teach Students to Make VALUE JUDGEMENTS 5. Suggests

---

<sup>4</sup> Ibid

<sup>5</sup> Wikipedia contributors. "Charlotte Mason." *Wikipedia, The Free Encyclopedia*. Wikipedia, The Free Encyclopedia, 23 Oct. 2019. Web. 2 Dec. 2019.

<sup>6</sup> Rudolf Dreickurs – Wikipedia - [https://en.wikipedia.org/wiki/Rudolf\\_Dreickurs](https://en.wikipedia.org/wiki/Rudolf_Dreickurs)

<sup>7</sup> William Glasser Institute – Choice Theory - <https://wglasser.com/our-approach/choice-theory/>



Reasonable ALTERNATIVES – lay out CONSEQUENCES 6. Be CONSISTANT and REVIEW your STRATEGY often

These foundational elements (Classical/Trivium, Charlotte Mason, Drs. Druickers and Glasser) permeate our teacher training and expectations, our school leadership beliefs, our board governance and classroom activities.

## **Curriculum and Instruction**

The selection of the instructional materials and program of instruction is uniquely aligned with Cato Academy's mission statement in that the interconnection of disciplines and focus on the full liberal arts education prepares scholars the society of the future. Through deep rich literature and a focus on the arts, scholars learn what is good true and beautiful and how their actions impact the community. Character development (Social and Emotional Learning) is an ongoing part of the entire campus learning experience.

With a focus on the Socratic and Shared Inquiry (Great Books Foundation) teaching methods put student lead discussions at the forefront of the Classical model. This student centered approach helps students refine their communication skills and build a deeper understanding of a wide range of subjects. Prior knowledge and interconnection of not just facts but how to apply the knowledge learned is the skill set that the classical model builds in scholars. Classically educated leaders including Martin Luther King Jr, Albert Einstein, JK Rowling, and a number of US Presidents appear throughout history and have major impacts on all portions of society.

Cato Academy is implementing time tested Classical pedagogy with research-backed choices on ELA, Math, Science curriculum and teaching methods. Operationally Cato Academy will employ a comprehensive program to ensure quality instruction including **1.** Quality teacher recruitment and detailed Professional Development offerings, **2.** Ongoing monitoring of curriculum, academic growth and teacher impact using the LoTi teacher evaluation tool. **3.** Quality data capturing metrics that help design and improve instruction (iReady – NWEA-MAP) **4.** Detailed intervention strategies using; MTSS/RTI, a framework with special interventions for Tier 3 students, ELL and Special Education populations. **4.** Quality curriculum aligned to Texas Essential Knowledge Skills with Customization for remediation and acceleration and special populations.

The Schoology cloud based Learning Management System (LMS) has been chosen by the Cato Governing Board to organize and support the teaching staff in their lesson planning and resource support. The contracted LMS, Schoology, is used by 20 million K12 users currently and was purchased by PowerSchool in October of 2019. With Schoology, teachers will have the option to enroll students in blended classrooms or use the tool for resource acquisition and lesson planning. The Cato Governing Board will determine the framework for digital tool usage recognizing that Classical Education is primarily about a book in the students hand, but understanding the role of technology in the future of their scholars lives.

**Curriculum Alignment with Mission/Vision: The Framework For Cato Academy's Academic Program Design** The end goal of the academic, athletic, community service and social emotional learning programs implemented at Cato Academy will be built out on the framework of the following goals: **1.** A focus on deep learning rather than shallow knowledge. **2.** The ability to assess mastery using a number of measures detailed in this application. **3.** Addressing the needs of all students regardless of socio economic, ELL designation or identified



learning adaptation. **4.** A focus on innovative learning methods that are rooted in the Classical Education framework but account for technology advancements in our modern times, a focus problem solving skills all with a goal of higher order thinking. **5.** A balanced approach of instruction from Socratic/Shared Inquiry (Great Books Foundation), to direct instruction, small group based learning. **6.** Character development and Social Emotional Learning is integrated into everything we do at Cato Academy. From in the classroom, in the lunchroom or on the athletic fields, character development is an everyday role of all staff members at the school.

**Curriculum Alignment with Mission/Vision: Classical Education Model** “Classical education depends on a three-part process of training the mind. The early years of school are spent in absorbing facts, systematically laying the foundations for advanced study. In the middle grades, students learn to think through arguments. In the high school years, they learn to express themselves. This classical pattern is called the *trivium*. The final phase of a classical education, the “Rhetoric Stage,” builds on the first two. A classical education, then, has two important aspects. It is language-focused. And it follows a specific three-part pattern: the mind must be first supplied with facts and images, then given the logical tools for organization of facts, and finally equipped to express conclusions.”<sup>10</sup>

**Academic Accountability Committee (AAC):** An Academic Accountability Committee (AAC) will be established and made up of the Principal, administration, master teachers, PD coach and ELL/Special Education team. The AAC will meet quarterly to review curriculum, data driven instruction (in particular the quarterly NWEA-MAP benchmark assessment data), teacher professional development strengths and weaknesses (using the LoTi teacher pop in scores explained in section 18 of this application) and recommend corrective actions in curriculum, pacing or professional development should the available data point to an issue. The school Principal will report to the Cato Governing Board the results, goals and progress after each quarterly NWEA benchmark assessment.

Concentration of the Trivium: Tools of Learning along natural transitions

| Grades K-5  | Grades 5-8   | Grades 8-12   |
|---|--|---|
| <b>Grammar</b><br>Foundational Learning<br>Beginning Latin<br>Mathematics Concepts<br>Memorize – Language Rules<br>Oration via Recitation | Grammar  | Grammar   |
| Logic   | <b>Logic</b><br>Asking ‘Why’ Stage<br>Making sense of facts<br>String together concepts<br>Connecting across subjects<br>Written & Oral Skills | Logic   |
| Rhetoric  | Rhetoric   | <b>Rhetoric</b><br>Socratic Stage<br>Reasoning – Persuasion<br>Draw upon Grammar/Logic<br>Internalization of Learning<br>Advance Oral and Written |

Shaded boxes are the dominant, but not exclusive, tools and techniques used for instruction. During each stage, all the subjects are taught (Math, Science, English, History, Fine Arts)

### **Curriculum and Instruction**

**Alignment with Mission/Vision:** Cato Academy chose the Classical Education model because it blends academic rigor with deliberate focus on Social and Emotional Learning. The role of a teacher in a Classical school is to encourage risk taking, exploration and deeper learning. Beginning in the early grades of K5, teachers blend direct instruction with Socratic discussions with the goal of students exploring the subject matter that interests them all within the preplanned scope and sequence. A classroom experience will have limited direct instruction, followed by individual or small group analysis of the topic

and then include classroom wide discussions. The Grammar stage of the Trivium is where foundation around math facts and concepts as well as grammar conventions, vocabulary, comprehension skills, early writing are taught and memorized. In the 5<sup>th</sup> to 8<sup>th</sup> grades, there is minor focus on direct instruction and a greater emphasis on Socratic/Shared Inquiry (Great

<sup>10</sup> What Is Classical Education by Susan Wise Bauer [www.TheWellTrainedMind.com](http://www.TheWellTrainedMind.com) ; <https://welltrainedmind.com/a/classical-education/>



Books Foundation) and student lead individual and group projects. Each band of the Trivium, in a Classical school, naturally follows the age appropriate learning styles. Recitation and jingle based learning begin in 1<sup>st</sup> grade and help young scholar's master concepts that will be referenced as they grow in the Classical model.

#### **Curriculum Alignment with Mission/Vision: Thematic Units – Emersion In History**

- The use of thematic units of study, in the case of Cato Academy, emersions in time periods of history have been found to have a higher level of Critical Thinking Skills and a more positive attitude towards Social Studies in general.<sup>11</sup> The Cato Academy Classical model built on a yearlong exploration of a historical time period moves beyond fact memorization and on to a deeper understanding. According to Freeman and Sokoloff's the goal it to build curriculum so that students explore these questions requires that students develop facility in math, science, literature, history,... etc. It is not possible to answer such questions without using the knowledge, skills, and attitudes represented within the disciplines.<sup>12</sup>

#### **Curriculum Alignment with Mission/Vision: Customized Curriculum Resources -**

Gibboney (1994)<sup>13</sup> showed the challenges teachers experience in taking off the shelf publisher textbooks and the difficulty in embedded the concepts into various pedagogies. His study puts forth that teachers are professionals and are most successful with they adapt their instruction to meet their comfort levels and the responses from their students. Nowhere is this adaptation more pronounced than in the Classical pedagogy. Since the Classical education model has been primarily focus on secular private schools, to build out a comprehensive thematic program has been elusive. Many public Classical charters have been forced to piece together a program from various publishing houses content. True thematic instruction has been difficult to achieve. Cato Academy will be starting with a comprehensive framework, perfected in other Classical schools which has over 2000 syllabi built for Math, English, History, Science, Art, Music, Logic, Latin, and Geography. These resources are available to use as is, modify and adjust depending on the teacher and classroom make up. The scope and sequence incorporates TEKS standards, "I Can" learning targets for teachers to use in their lesson planning, unit long Exit Tickets aligned to TEKS and Social Emotional Learning prompts tied to ELA, History and other subjects.

**Teacher Curriculum Resources:** The **Schoology LMS** will have a series of curriculum resources and support materials to compliment the selected text books detailed in this section. Schoology has day by day sample lesson plans, add on resources (powerpoints, documentaries, Socratic discussion prompts, source documents etc.) which the teacher can use off the shelf or can customize to the pacing and interest level of the scholars. Think of Schoology as a customized, Classical Education, thematic unit version of Teachers Pay Teachers that is resource rich and aligned to the schools scope and sequence.

**Exit Tickets and I Can Statements:** Each unit of study for English, Math, History, Science and Art/Music has a defined **Exit Ticket** which align to TEKS standards and objectives which are to be mastered at the completion of the unit. In addition to the Exit Tickets, there are daily or weekly **"I Can Statements"** that further break down the standards to be mastered. These Exit Tickets and I Can Statements are aligned to TEKS standards and allow for Administration to visually audit that teachers are on pace with the adopted scope and sequence.

---

<sup>11</sup> The Effects of Thematic Social Studies Instruction on Eight Grade Student's Historical Reasoning Ability and Attitudes Towards Social Studies Related Tasks. Cloutier, Andrew R (2013). Education Dissertations. <http://repository.wcsu.edu/educationdis/21>

<sup>12</sup> Freeman, Skoloff, "Toward a Theory of Thematic Curricula: Constructing New Learning Environments for Teachers & Learners" (1995). Education Policy Analysis Archives.

<sup>13</sup> Gibboney, R. (1994). The stone trumpet. A story of practical school reform, 1960-1990. Albany, NY: State University of New York Press.



**Assessment and Data Tracking Plan:** Cato Academy will contract with NWEA-Map assessments beginning in 2<sup>nd</sup> grade. Using internal assessment data from NWEA-Map, the Cato AAC team can quickly isolate low scores and determine if the issue is a curriculum based or isolated to a particular instructor. With curriculum that is paced correctly and which calls out the various standards to be focused on during the particular unit we can assure that we have a common foundation from school to school. The data driven instruction becomes an identification tool to help with our differentiated instruction inside the classroom or as an intervention tool. The following assessment data will be analyzed on a per scholar: **1.** DIBELS-Dynamic Indicators of Basic Early Literacy Skills (K3) **2.** Teacher developed pre-assessment and post-assessment (all grades) **3.** Teacher developed rubrics for writing and oral skill mastery (TEKS ELA standards 1, 11 and 12) **4.** Math Fact Fluency Assessment goals by grade (as outlined by NWEA-MAP – TEKS – iStation - all grades). **5.** RIT Word Fluency Assessment goals by grade (as gaps are identified in NWEA-MAP all grades) **6.** Math – NWEA-Map Fluency, Teacher Assessment, Singapore Math Assessments (upper grades), Saxon Math Progress Monitoring Assessments (all grades), iStation as implemented K5. **7.** Scholar Report Cards and progress monitoring (all grades) **8.** Historic review of Texas STAAR results by grade band as well as key grades of 3<sup>rd</sup>, 5<sup>th</sup> and 8<sup>th</sup>. **9.** NWEA-MAP quarterly scholar assessments (beginning in 2<sup>nd</sup> grade)

Each teacher will follow a prescribed, 8 point plan for analyzing their student (NWEA-MAP) benchmark data. This process includes the teachers strategy to address learning gaps, address special populations and establish S.M.A.R.T. goals to achieve prior to the next NWEA Benchmark test(part of the teachers 8 step data analysis protocol). The teacher generated lesson plans will be audited by the Principal and ACC team for completeness. For all students, testing data will be analyzed and broken down by strand a series of intervention programs will be employed to achieve maximum student growth; **1.** Study Hall or one on one tutoring with the teaching staff (to occur during mandatory weekly 2 hour teacher study hall). **2.** Purposeful Pause in content delivery if entire portions of a class need assistance **3.** Dedicating class time to differentiate in ‘Crash Course’ by strand instruction. **4.** Advanced scholar strategy to challenge students who can advance beyond their grade level. **5.** Differentiated Instruction – and the training needed for all teachers to successfully implement differentiation techniques in their classroom. **6.** Progress monitoring with additional testing on standards that need additional support. **7.** Third party cloud based subscription services such as Study Island. **8.** Parent Volunteers and or tutor clubs. **8.** Referral to RTI/MTSS and intervention

**For Referrals to RTI/MTSS:** RTI/MTSS team will review academic performance of individual students that need supports above and beyond classroom interventions. The RTI/MTSS team will implement a learning plan to ensure success of all students. The analysis will include: **1.** High quality, differentiated core instruction in an environment that is responsive to social, emotional and academic and behavior goals. (monitored by the PD and Admin team). **2.** Data informed decision making. Review of goals, prior data, improvement and trends. **3.** Progress monitoring using benchmark testing. **4.** Layered hand offs for a continuum of academic, social, emotional and behavior supports. **5.** Family, School and community partnership as available. **6.** Professional Development offerings and tailoring to meet the particular needs of a teacher or the entire school. **7.** The Hexagon Tool<sup>14</sup> is a framework to score a schools ability to

<sup>14</sup> Metz, A. & Louison, L. (2018) The Hexagon Tool: Exploring Context. Chapel Hill, NC: National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill. Based on Kiser, Zabel, Zachik, & Smith (2007) and Blase, Kiser & Van Dyke (2013).



react and sustain a comprehensive program. The Hexagon Tool includes the MTSS/RtI team grading the schools capacity at any given time of the following – 6 Point Plan Includes: 1. Needs of students; how well the program or practice might meet identified needs. 2. Fit with current initiatives, priorities, structures and supports , and parent/community values. 3. Resource Availability for training , staffing, technology supports, curricula, data systems and administration. 4. Evidence indicating the out comes that might be expected if the program or practices are implemented well. 5 Readiness for Replication of the program, including expert assistance available, number of replications accomplished, exemplars available for observation, and how well the program is operationalized. 6. Capacity to implement as intended and to sustain and improve implementation over time.

**Tier 1 and 2 – Classroom Differentiation** - Once scholar's skills needs have been identified, teachers will implement a differentiation strategy that best fits their unique class dynamics. The methods that teachers are trained on by our Professional Development team and the process administration is tracking include; Lessons that are differentiated by a choice of content, process or outcome goal. The grouping will be done by student interest, skill readiness or learning profile. The tactics employed by the teacher in the classroom will include flexible grouping, student choice, and learning centers. Ongoing monitoring and adjusting are crucial to a successful differentiation program.

Students in the 20-30% of grade level proficiency will be enrolled in the Cato Academy intervention program and move to Tier 3 – Pull out intervention. **Tier 3 - Pull Out**

**Intervention:** Certain scholars will be identified as needing beyond classroom support and will be enrolled in the Cato Academy Intervention Program. Tier 1 and 2 interventions primarily occur with the classroom teacher. Tier 3 interventions for struggling early readers involve identification and constant monitoring and small group pull out instruction. In the intervention department, that team has a number of digital options including the iReady English program and workbook as well as the iReady assessment tool to monitor progress. Wilson Foundations ([wilsonlanguage.com](http://wilsonlanguage.com)) has been identified as an intensive intervention system and will be available on an as-needed basis as well as the open source resources developed by Dr. Sharon Walpole from the University of Delaware and found at [Bookworms.com](http://Bookworms.com).

If academic achievement expectations or goals are not met, the leadership team will also analyze data and operations to determine if there are deficiencies in instruction to include curriculum and or teacher instructional techniques. The corrective action steps would include the following: **1.** Additional observations of teachers to identify poor instruction, classroom management, or root cause issues that may be affecting student outcomes. **2.** Referral to the school leadership team to analyze curriculum and resources to ensure proper alignment of state standards. **3.** Revamp the Enrichment and Remediation (E/R) instruction in middle school to better meet the needs of students who are not meeting academic expectations. **4.** Address teacher training and professional development offerings to specifically address shortcomings in academic expectations or goals. **5.** Analyze and adjust student ability grouping via differentiation in lower grades and class enrollment in middle school, where necessary. This would happen for both reading groups and the math block. The Principal would be responsible for implementing corrective action if expectations or goals are not being met. The Principal will enlist the assistance of the lead teachers, the Academic Accountability Committee (AAC) team and the schools governing board in order to take immediate corrective action.



**Teacher Based Benchmark and Final Exams:** Teacher created content-specific Benchmark and Final Exams are required in every Cato Academy course. These assessments provide teachers with essential data regarding the effectiveness of their teaching and the curriculum. Teacher generated quarterly and mid term exams provide teachers and scholars with the opportunity to measure the amount of learning at the mid-point in the semester. Final Exams provide teachers and scholars with the opportunity to summarily measure the total amount of learning over the entire semester. Triangulated with teacher generated exams is the quarterly NWEA-MAP assessments which benchmark each grade level to national cohorts. Instructional staff will be trained and monitored on their formative and summative assessments occurring in their classroom. Some of the techniques teachers will be expected to implement include:

**Formative:** Check for Understanding - Throughout the lessons, the Teacher will regularly check for understanding using a variety of methods: **1.** Class response system – thumbs up thumbs down. **2.** Q&A. **3.** Exit Tickets. **4.** Classroom quizzes. Define Success – Socratic feedback and tracking -The teacher provides students with an open-ended question related to a concept they are studying and asks the students to identify the information or details necessary for a response to demonstrate full understanding of the concept. A list of these details is recorded on the board Quiz with Student Cross Grading – Each unit of instruction, typically 4 weeks, will involve one or two quizzes prior to the End of Chapter Test. Quizzes will be graded by fellow students and time will be devoted for time to pair and share between students to solve quiz answers that are not correct.

**Summative including:** **1.** End of Chapter Testing – Students will be given an end of chapter test with instructions to show their work. The grading rubric will include 75% of the overall grade will go for the correct answers and an additional 25% for correct showing of how the student arrived at the answer. **2.** Summative Assessment Analysis and Adjustment –following summative assessment results, the teacher will determine if the entire class should be reinstructed on the particular topic or if a differentiation program should be implemented to ensure mastery of the subject. **3.** Homework Help Program – Students are asked to place the homework that they are struggling with on the board. Other students then begin working through the steps of solving the equation with the student struggling with the work functioning as teacher – fielding and directing the discussion.

**Curriculum Alignment with Mission/Vision: Latin Instruction** - Scholars at Cato Academy will be instructed in Latin language with a focus of 5 or the 5 dictated standards laid out by The American Classical League and The American Philological Association and Regional Classical Associations<sup>15</sup>. Standard 1 is to read and understand the Latin language, standard 2 is to have an understanding of the Roman culture and the foundations of the Latin language, standard 3 and 4 is to integrate and recognize Latin origins across subject areas. Standard 5 is to integrate their knowledge of Latin into their community. Latin language instruction found in Cato Academy beginning in third grade has been found to have lasting impacts on SAT scores and student achievement. **1. SAT Scores** - In 2002, The College Board published a newsletter stating that the mean Verbal SAT score for those who took the SAT II Latin Test was 666, compared to the national average of 504. Students who took the French SAT II Test achieved a mean verbal score of 637, compared to the 581 achieved by students who took Spanish. Likewise, those who majored in "Classical Languages" or "Classics" and took the GRE between

---

<sup>15</sup> Standards for Classical Language Learning. A Collaborative Project of The American Classical League and The American Philological Association and Regional Classical Associations. (1997)



1996-1999 scored the highest of over 270 fields in the Verbal section. <sup>1</sup> 2. According to Association of American Medical Colleges, students who major or double-major in Classics have a better success rate getting into medical school than do students who concentrate solely in biology, microbiology, and other branches of science” (Princeton Review).<sup>2</sup> 3. In 1971, more than 4,000 fourth-, fifth- and sixth-grade pupils of all backgrounds and abilities received 15 to 20 minutes of daily Latin instruction. The performance of the fifth-grade Latin pupils on the vocabulary test of the Iowa Test of Basic Skills was one full year higher than the performance of control pupils who had not studied Latin. Both the Latin group and the control group had been matched for similar backgrounds and abilities.<sup>3</sup>

In finalizing the early literacy/mathematics program, the Principal will craft compliant **Texas HB3 - K3 literacy and mathematics proficiency plans**. The Principal will and post the final plan on the school website. As part of the Board’s annual academic performance plan, HB3 will criteria will be included. Goals will be adopted for all students and for disaggregated student groups. The Academic Accountability Committee will report to the Governing Board the progress toward those goals at least once annually. Teacher training, goal setting and additional compensation will be adopted by the Governing Board annually in accordance with HB3 directives from TEA.

**Curriculum Alignment with Mission/Vision: English Program** The Cato Academy English program draws from works of literature from American, British and World Lit and Classics. All literature courses will be built around the novels selected in the particular course. Young Adult Contemporary Classics and traditional Classical literature has been chosen based on the grade level, novel Lexile score, and the time period match of the novel to the history theme. These novels will be used to construct classes that discuss themes relevant to scholars and which are aligned to the school’s mission, vision, and core values. Each model novel lesson will include components of literary analysis (theme, plot, arch), grammar (foundational grammar and sentence structure lessons), vocabulary (taken from the novel with LEXIL appropriate text as well as high frequency misspelled words for that grade level and a focus on Latin root words.), and writing (prompted from novel themes, focused on a repeating pattern of Narrative, Opinion, Informative and Creative writing conventions).

**K3 ELA Program Kinder to 3<sup>rd</sup> Grades:** Scholars will receive daily English instruction equal to no less than 135 minutes per day. Our program requires three 45-minute segments. The segments involve (1) a daily interactive read-aloud with time for grammar and writing instruction. The text choices are above grade level and teachers will be trained to make these read alouds interactive. Additional time in this 45 minute block will be used for writing and learning grammar conventions, with the read aloud text as a guide. (2) a daily shared reading lesson involves students following along with the teacher and word studies for difficult words found in the text, this segment involves partner reading as well and (3) small-group differentiated instruction occurs during the third 45 minute block. Using assessment tools including Dibels, the teacher will group students at reading levels and work through struggling readers as needed. During ELA lessons, scholars are introduced to the objectives which are aligned to TEKS standards and easily found in the Schoology LMS for each unit. In Kinder to 3rd Grade the focus on the ELA program is on encoding, decoding, comprehension and making connections to fiction and non-fiction text. The ELA **framework was**

---

<sup>1</sup> A Case for Classics In Middle School, Ruculo. John Hopkins School of Education (2004)

<sup>2</sup> Classics! Princeton Review - <https://www.princetonreview.com/college-majors/64/classics>

<sup>3</sup> Latin in the Elementary School: A Help for Reading and Language Arts, Nancy A. Mavrogenes, *The Phi Delta Kappan*, Vol. 60, No. 9 (May, 1979), pp. 675-677



developed by Dr. Sharon Walpole with the support of the University of Delaware and is available as an open source platform with customization of literature choices to match our Classical model. The protocol of the K3 ELA program will include evidence based practices that enable teachers and students to focus on building foundational skills, fluency, comprehension and knowledge. The curriculum offerings, pacing and teacher support includes ; **1.** Balanced literacy choices between fiction and non-fiction. **2.** Heavy focus on real book that are leveled and ready available. Lessons, research, writing, large group and small group activities are based on the literature provided in each classroom. **3.** There is a use of songs, jingles and chants to anchor foundational skills. **4.** Teacher directed read alouds are a daily occurrence and part of the Charlotte Mason influence on the Classical model. **5.** Vocabulary and grammar skills are introduced, memorized and learned weekly through the assigned literature. Latin root words are introduced in 3<sup>rd</sup> grade spelling. **6.** Phonetic awareness is introduced in early kinder and 1<sup>st</sup> grades and as remediation where needed (in small groups). **7.** Whole class and center based reading time is embedded in each day. **8.** Value and virtue prompts that coincide with campus wide social-emotional learning are integrated in projects, Socratic discussions and writing prompts. Writing in a Classical school is a frequent occurrence across subjects. The scope and sequence mapping calls for a rotation of Opinion, Narrative, Expository and Research based writing to occur not only in English but in History and Science (lab journaling/research) as well. **8.** In class differentiation occurs in small group times and intensive intervention strategies are employed on the lowest 20-30% of readers **9.** Scholars have a grade-appropriate poem that they recite individually and as a class starting in Kinder and continuing to 8<sup>th</sup> grade. **10.** The use of songs and jingles to engage and anchor grammar skills. Integral within the read aloud block is focused instruction from the teacher on reading nursery rhymes, poems that use jingles in aiding scholars in memorizing. This is in line with our philosophy on the ability of young children to memorize basic facts and fundamental rules, and to absorb background knowledge and information more easily at a younger age.

The ELA program was chosen because it has been proven to build early readers and a strong ELA foundation.<sup>20 21</sup> 1. Utilizes all learning styles: visual, auditory, kinesthetic. 2. Never teaches isolated concepts. 3. Incorporates scholar/teacher interaction. 4. Uses repetition to attain mastery. 5. Challenges accelerated scholars. 6. Promotes higher-order thinking. 7. Provides the connection between grammar skills, writing and effective speaking.

**Handwriting (K5 to Mastery):** Handwriting is introduced in kindergarten and developed throughout grades 1-6. Cursive writing is introduced beginning in grade 2. Attentiveness to detail, correct formation and overall neatness is emphasized at each grade level.

**ELA Program 4<sup>th</sup> to 8<sup>th</sup> Grades;** For grades 4<sup>th</sup> to 8<sup>th</sup>, the ELA program aligned to 6 to 8 classical novels. These novels have a Lexile reading level that is just above grade level. From the novel study, the curriculum program has customizable lessons to address the major components of an English program. Each novel has a featured writing prompt (Argumentative/Persuasive, Explanatory/Informative, Narrative and Research), that the scholars work on from prompts in the novel. This writing prompts are also scheduled into their history instruction and when appropriate into science, music, and art. In addition to writing, teachers follow the TEKS scaffolded standards for literature analysis, grammar, vocabulary and presentation skills. These TEKS standards are found in each unit as Exit Tickets and 'I Can

<sup>20</sup> S.Giancola, S.Jelenewicz, J. Klein, G.Mora, K.Morrison, D.Riser, A.Sarfo. Bookworms Case Study. Univ of Delaware CRESPP Study. Jan. 2019.

<sup>21</sup> EdReports.org (2017) <https://www.edreports.org/reports/overview/bookworms-2017>



Statement'. Themed units are aligned to one or two novels which allow the teacher to introduce compare and contrast prompts and allow the student to integrate historic source documents, plays, poems and excerpts from other classical works of literature into their unit.

The ELA block is also 135 minutes and likewise is broken down in 3, 45 minute segments. Block 1. Additional time in this 45 minute block will be used for writing and learning grammar conventions, with the read aloud text as a guide. The text complexity is increased in read alouds (2) a daily shared reading lesson involves students following along with the teacher and word study to include select Latin root words as prescribed, this segment involves partner reading as well and (3) small-group differentiated instruction occurs during the third 45 minute block. By this stage, our NWEA-MAP benchmark data will drive ability grouping and where the teacher will focus in small group differentiation. Read alouds become optional in grade 6 and more student choice is built into the plan.

Cato Academy works with the 70 year old Great Books Foundation for content, lesson planning and professional development on their Shared Inquiry model. The program is rooted in the great works of classical literature and implements teacher based inquiry techniques that have been proven to increase reading comprehension and writing skills in elementary students. The power of the program is in Collaborative Discussion Guided by Authentic Questioning from a trained teacher. The Great Books Foundation provides teachers with training in the Shared Inquiry method which functions much like a Socratic discussion but the teacher is leading and directing the discussion. The Great Books Foundation curriculum tools are aligned to the theme or time frame of the novels being studied in order to keep the thematic learning benefits in place.

An example of the ELA in practice, in 6<sup>th</sup> grade, the first semester, two novels, *King Arthur and His Knights of the Roundtable* by Roger Green and *The Samurai's Tale* by Erik Haugaard (the Mulan story), are the primary novels being studied. Grammar, writing and vocabulary lessons are built out from these novels. In addition to the novels, the theme of *The Hero's Journey*, based on Joseph Campbell's work on archetypal stories, is introduced through the four month unit. The *Hero's Journey* unit includes shorter passages from *The Power of Myth* (Joseph Campbell), *Beowulf* (JRR Tolkien), *The Once and Future King* (T.H. White), *The Perfect Storm* (Sebastian Junger) and *Grendel* (John Gardner) as well as an article by Jon Krakauer from 1996 about his ascent to Mt. Everest. The poems to memorize and recite tie into the hero and adventure theme to include, *Travel* by Robert Lewis Stevenson and *Can't* by Edward Guest. Each day, the teacher would have a plan that connects the value/virtue of courage to the novels. Socratic discussion prompts and writing exercises incorporate identifying similarities and difference in the story themes and how each author chose to address the hero's journey in their work. The class would be arranged into small groups for preliminary discussion of the prior night reading and then classroom wide Socratic discussions would take place to measure comprehension and build speaking and listening skills. Throughout this unit the scholars will be dissecting the text, identifying themes, authors voice, alliterations and figures of speech. Various writing styles (narrative, opinion, expository) will be assigned and discussed. The blend of informational text and fiction help immerse the students into the theme of the unit and value/virtue of the month. This full dive into ELA units carries on into history and the thematic approach to a topic that is a hallmark of Classical education.

Writing occurs not only in English but in History and Science. The teacher grading distribution must include at least 10-20% of the student's grade (depending on the grade band) in these subjects to include journals, research papers, presentations and scientific notebooks. ELA



will focus a balanced literacy between fiction and non-fiction. History and science will primarily focus on literacy standards and feature informational text and historic source documents, all of which are identified and provided for the teacher. Logic is a hallmark of Classical education schools and will begin in the 6<sup>th</sup> grade and continue to 8<sup>th</sup> grade. The Logic units introduce students to the foundations of argument, fallacies and the various forms of argument. Logic has a heavy focus on written and oral presentations and defense of a point of view.

Interventions in K8 ELA classes involve a three tier approach, the first two occurring in the classroom and the third involving a selection of options determined by the RTI/MTSS team. Intervention strategies are detailed under the Intervention located below.

**Curriculum Alignment with Ed Philosophy:** Mathematics Program the teachers will have grade by grade TEKS math standards and a number of resources to support goals of teaching math. (see sample 5<sup>th</sup> grade scope and sequence attachment) The school will provide the following options for math instruction. The primary plan for math will be a pre-designed set of scope and sequence by grade maps that the teachers will follow to allow for grade by grade scaffolding of concepts towards mastery. The focus in math instruction will be on the Operations and Algebraic Thinking, Number and Operations in Base Ten, Measurement and Data, Geometry, Number and Operations – Fractions (beginning with limited mastery in grade 4) and Financial Literacy. Math will occur in the allotted class time but we believe math should be introduced in other subjects as well. The cross subject instructional model, which is a hallmark of Classical Education, applies to math as well. In science measurements, math facts, fractions and basic computations are a natural tie in to the mathematical learning. Statistics are becoming more and more important as scholars continue their education. Because of this trend, we are training and requesting that teachers look for opportunities to include statistical analysis (graphics, charts, data analysis) into their history, science and other subjects.

Professional development and instructional expectations are that teachers organize their math instruction in five daily activities: morning routines, fact practice, an explicit lesson, guided class practice, and homework. For supports, we will make available the iStation math resources, Singapore math and Saxon math textbooks.

In developing the mathematics program for the Cato Academy math program, the founding group looked for a program explicitly aligned to the school's philosophical approach, specifically: 1. Integration of conceptual understanding, computation fluency, and problem solving skills. These traits are critical for building on a math future for scholars and passing of the STAAR exams. 2. Proficiency to mastery of whole-number operations, fluency with standard algorithms, and understanding of core math laws of operations. Sufficient opportunities for practice with whole-number operations are necessary to develop automatic recall of core math tenants. 3. Math learning of all students can be improved by a strong differentiation program in the classroom and interventions that address social, affective, and motivational factors. 4. Professional development for teaching staff with emphasis on using frequent assessment data to plan remediation and pacing. Our rationale for building the math program draws heavily from research which indicates that students who are taught with a mathematics curriculum that uses continual practice and review demonstrate greater math achievement and skill acquisition than do students who are taught with a mass approach (Good & Grouws, 1979; Hardesty, 1986; MacDonald, 1984; Mayfield & Chase, 2002; Ornstein, 1990; Usnick, 1991).

**Math Schedule** – Kinder to 8<sup>th</sup> Grade - Math is the second largest block scheduled for mornings with 60 minutes in K5 and 55 minutes in 6<sup>th</sup> to 8<sup>th</sup> each day of instruction per week.



Within the math block instruction will be purposeful and spiral concepts from prior lessons with new concepts. This spiraling aspect spends the first part of the year (25% to 33% of the years total lessons) on prior knowledge and foundational concepts needed to master the current years concepts. The remainder of the year then slowly introduced from basic core concepts for the particular course to more advanced concepts. Prior standards are continually brought back in with the goal of building deeper understanding and mastery. Research also suggests there is value in a teaching method that uses small, easily digestible chunks of information within its lessons (Ausubel, 1969; Brophy & Everston, 1976). Studies by Rosenshine and Stevens (1986) and Brophy and Everston (1976) demonstrated the importance of using incremental steps when teaching new information. Effective concept development involves incremental skill instruction distributed throughout a school year.

The structure in the classroom for math instruction will be a balance of INSTRUCTION, PRACTICE and ASSESSMENT. Every 10 lessons an assessment is given to check the class for understanding and to give the teacher feedback on how concepts are being retained. Continual, distributed practice ensures that concepts are committed to students' long-term memory and that students achieve automaticity of basic math skills. Several research studies show that students who are taught with a mathematics curriculum that uses continual practice and review show greater skill acquisition and math achievement (Good & Grouws, 1979; MacDonald, 1984; Hardesty, 1986; Mayfield & Chase, 2002; Usnick, 1991; Ornstein, 1990). Additional studies have concluded that spaced (distributed) practice results in higher performance than massed practice (Dhaliwal, 1987; Proctor, 1980).<sup>22</sup>

#### **Curriculum Alignment with Mission/Vision: Science Program**

The science program at Cato Academy follows a pattern of one full year of Earth Sciences, Biology, Chemistry and Physics. The science scope and sequence will include; a primary focus on Biology in 1<sup>st</sup> and 5<sup>th</sup>, Earth Sciences in 2<sup>nd</sup> and 6<sup>th</sup>, Chemistry in 3<sup>rd</sup> and 7<sup>th</sup> and Physics in 4<sup>th</sup> and 8<sup>th</sup> grades. In addition to the primary science focus by grade, each teacher will incorporate science standards prescribed by grade in accordance with the TEKS standards. The teacher will be responsible for grading and promotion of the scholar from the course. The purpose of our science program is to provide students with a broad knowledge of scientific concepts and establish a solid foundation for students to pursue high school and college level sciences. At the beginning of each science course, the teacher will reintroduce the scientific method, safety in science, and lab journals protocols as age appropriate. Each course will have major historic advancements in science or famous scientists from the time or science discipline. The science curriculum will prepare students to achieve the Science TEKS master of science concepts prescribed for each grade level by incorporating an inquiry-based approach to learning of the central science themes: matter and energy, force and motion, earth and space, presses of life, and the scientific method. Classroom teaching strategies will emphasize active learning, both individually and in groups. Students will engage in problem-solving, communication, and reasoning through experiments, modeling, investigations, and real-world applications. All science coursework is designed to promote a sense of inquiry through laboratory experiences and to further develop critical thinking skills. Science courses will include a heavy emphasis on the major scientists and discoveries surrounding the various units of learning. The ethical and moral implications of scientific advancements are embedded in lessons for teachers to bring historical

---

<sup>22</sup> Research – Behind the Difference That Gets Results. Saxon Math. HMCO Publishers.



perspective and moral debates into the science classroom. Emphasis will be paid on the use of laboratory techniques, terminology and relationships between scientific and mathematical disciplines. The school will provide science labs appropriate to the programmatic and content needs of each area of scientific study. Instruction will also include teaching the need for appropriate safety measures, protocols, precautions, and procedures for the science classroom.

**Curriculum Alignment with Mission/Vision: US Citizenship Exam** – The goal for a graduating 8<sup>th</sup> Grader will be to score 85% on 100 question, US Citizenship exam. Beginning in 5<sup>th</sup> grade, up to 25 questions will be introduced and studied per year. Aligning the focus questions to the particular historic theme unit is part of the curriculum mapping. US Citizenship Exams are not related to any requirements for citizenship, the Governing Board believes Cato Academy students should leave the program with a higher level of understanding of the American experience.

**Curriculum Alignment with Mission/Vision: History Exit Tickets** - Each unit of history (1 month) from 1<sup>st</sup> to 8th grade has an accompanying Exit Ticket for completion of the course. These Exit Tickets are what the instructor designs their history instruction around. Cato Academy believes that history is more than dates and events, and encourages the instructors to make the time period come to life. Each of the month long units has content created using the S.P.R.I.T.E. (Society, Politics, Religion, Intellectual, Technology, Economic) model. Prior to opening, inside of the Schoology Learning Management System, there will be available for the teacher lesson plans, short videos, long-form documentaries, source documents and close reading materials for instructors to choose from in arriving at the Exit Ticket goals. Specific add on modules for Economics, Geography and State of Texas specific skills will be included for teacher lesson preparation.

**Curriculum Alignment Special Areas: Art, Music, Physical Education:** Scholars at Cato Academy will participate in a structured art class, music, and physical education classes. Art will have an emphasis on art appreciation. The principles and fundamentals of art will also be taught. Music will have an emphasis on music appreciation, and chorus in the upper grades. Art and music themes are aligned to the time period in history being studied by the particular grade band.

**Curriculum Alignment with Mission/Vision: Social Emotional Learning (SEL) – Character Education** – The Cato Academy Governing Board chose the Classical Educational model because of its balanced focus on academic achievement and character education. The school will launch with a 7 step character education program which incorporates research and best practices on effective Social and Emotional Learning.

1. **Language based curriculum delivered through a strong literature based curriculum.** By using classical literature and fables scholars learn through the power of time tested moral stories. Societies have used the power of story to teach the next generation right from wrong for over 5000 years. The expansion of vocabulary and the ability to internalize these deep rich stories into everyday life are the foundation of the Cato character program.<sup>2324</sup> Critical to the Cato Academy model will be a comprehensive Social Emotional Learning program that includes lesson plans, SEL discussion prompts and training tools for teachers to incorporate into their lessons.

---

<sup>23</sup> Carr, David & Harrison, Tom (2015). *Educating Character Through Stories*. Imprint Academic.

<sup>24</sup> Bohlin, Karen (2005). *Teaching Character Education Through Literature*. Psychology Press.



2. **Content and Process** – As part of the Cato Academy character plan, the entire school will spend one month on TWO values and virtues. The Governing Board started with the Ben Franklin 13 Virtues (published in his 1720 autobiography) and tailored the options to include 20 values/virtues to cover throughout the year. Teachers and scholars spend intentional time, with a featured value/virtue each month. The in-depth analysis includes school wide exercises and in classroom discussion on the focus value/virtue. Scholars walk through what the value/virtue means, what the alternatives are and how their actions affect the scholars around them.
3. **Positive Language and Discipline** – This method uses the foundations of Dr. Rudolf Dreikurs and Dr. William Glasser. These two foundations are rooted in the WHY of anti-social behavior and the importance of HOW we react as a school community to poor behavior. The nuances of choices of language and the power of relationship and high expectations are the root of both philosophies. Dreikurs states that "his goal may occasionally vary with the circumstances: he may act to attract attention at one moment, and assert his power or seek revenge at another" (Dreikurs, 1968, p.27)<sup>25</sup>
4. **School Climate Approach** – Character education and Bullying prevention does not stop in the classroom. An effective culture program should incorporate every aspect of a scholar's day on campus. From orderly transfers in the hallways, holding of doors for other scholars or adults, to the custom of using please and thank you, to cleaning up lunch the room and modeling the appropriate behaviors on the playgrounds there are large and small parts of every scholar's day that should reemphasize the school's cultural norms. As part of the roll out of the Cato Academy character program includes, numerous visual reinforcements in the classroom, on the hallway walls and on lunchroom and play areas are an important reminder of what the school holds as important. Visuals are custom designed to tie in with the famous stories from history which are studied in the classrooms to reinforce character messages. Incorporating the visuals and stories from Values.com provides specific options of visual reinforcements for schools with different socio economic issues or specific issues that need to be addressed.
5. **Teacher Aligned and Integrated Support** Materials available in Schoology LMS include values and virtues lesson plans, prompts tied to novels, campus wide programs as standalone modules or for maximum impact embedded in the traditional ELA, History and Science and lessons. The curriculum embedded approach lets teachers and scholars move seamlessly through TEKS standards and character instruction. There is a **High Degree of Teacher Flexibility** in our character education plan. No one knows their scholars and what the classroom needs moment by moment better than the teacher in the classroom. Specific professional development training will occur prior to the launch the school year and ongoing to support the teachers mastery of Social Emotional Learning opportunities.
6. **Parental Involvement and Scholar Ownership**– Parent engagement is paramount for success of any educational or character based program. Part of the Cato Academy character education involves parental outreach and a focused effort aimed to engage parents with on campus activities and service projects. Partnering with families and the community is critical to the Mission/Vision set forth by the Cato Academy Governing Board. The study of growth mindset and engagement of students in their learning has shown promising results in

---

<sup>25</sup> Dreikurs, R.. & Loren, G. ( 1968 ). A new approach to discipline: Logical consequences. New York: Hawthorn Books.



increasing student outcomes, rising above socioeconomic or home life challenges and creating a sense of belonging on a school campus.) **Cato Academy House System** – to achieve the goal of involvement from parents and ownership from students, Cato Academy will roll out a house system with the launch of school. The concept has been tested and is inspired by the ideals of republican participation, shared leadership, and civil service.

Specifically, the Cato Academy House System exists for three purposes:

- To allow scholars a system in which they can belong, collaborate, and serve.
- To allow families an organizing structure to build community, celebrate learning, and give back to their local school.
- To sponsor school events and other school needs with the creativity, energy, and leadership of family-volunteers in each grade-level.

Similar to how the curriculum is organized by historical time period following a 4-year cycle, scholars in each grade-level will belong to a House (called by the Latin “Domus”) in partnership with the other grade-level that is studying the same period in history each year. Houses are encouraged to seek outside service projects beyond the campus. Suggested activities include visiting retirement homes, volunteering in local parks, connecting with local service clubs like Rotary International and more.

7. **Foundations Rooted in Stoic Philosophy** Stoic model of education—derived from the works of Seneca, Epictetus, and Aurelius focuses on education as knowing yourself and the importance of logic and critical thinking in decision making. In the tradition of Stoic philosophy, education is preparation for life and knowledge is integrated into private, local and global understandings. School leaders, teachers and staff will be hired and expected to exhibit the Stoic ideals we teach in the classrooms. The name, Cato Academy is a nod to the Roman statesman and Stoic ideas that we model and integrate in the classroom and campus wide.

**Governing Board Monitoring of Curriculum and Instructional** strategies will be monitored on a quarterly basis by the Academic Accountability Committee (AAC). The AAC will be lead by the school Principal and include members of the professional development team, master or lead teachers and special education director. A quarterly report will be generated by the AAC for the Cato Academy Governing Board and a presentation will be made by the Superintendent upon completion of the quarterly committee review. The data points to be monitored and reported to the AAC and then on to the Cato Governing Board will include: Benchmark analysis from the NWEA-MAP quarterly exams, reporting from the RTI/MTSS committee on specific scholars in jeopardy of being retained and the ARD committee regarding progress with special populations. The report will include academic growth, and any strategies required to ensure all students are at or above grade level in ELA and MATH. Subgroups (including ELA and Special Education) will be delineated and reported in the same fashion. LoTi pop in observation scores that have been input by the school administration and PD director will be included in the Governing Board report. A synopsis from the AAC on the teaching staffs strengths and weaknesses as well as a plan from the Admin as to how they intend to improve instruction will be included Any curriculum change suggestions will accompany the Governing Board Academic report. The Governing Board will ensure proposed changes are in line with their guiding mission and vision for the school. Historic review of the recent STAAR results, the cohort growth will be reviewed by the Governing Board prior to the start of the next school year. The Cato Academy Governing Board may elect to establish an academic review standing committee to better understand academic performance.



**High Quality Teaching** - The role of a teacher in a Classical school is to encourage risk taking, exploration and deeper learning. From ‘sage on the sage’ to ‘guide on the side’, the teaching staff receives focused training on the power of questioning and the fine art of leading a Socratic discussion or Shared Inquiry lesson. Beginning in the early grades of K5, teachers blend direct instruction with Socratic discussions with the goal of students exploring the subject matter, building upon prior knowledge, making connections between subjects and exploring topics of student interest. The board approved, scope and sequence is a monthly guide with bread downs of standards to be mastered and academic strands to be taught. Within those guidelines, there is a high degree of teacher customization available to meet the needs of a diverse student population. A classroom experience will have limited direct instruction, followed by individual or small group analysis of the topic and then include classroom wide discussions. The Grammar stage of the Trivium is where foundation around math facts and concepts as well as grammar conventions, vocabulary, comprehension skills, early writing are taught and memorized. In the 5<sup>th</sup> to 8<sup>th</sup> grades, the beginning of the Logic stage of the Trivium, there is much less of a focus on direct instruction and a greater emphasis on Socratic/Shared Inquiry (Great Books Foundation) and student lead individual and group projects. Each band of the Trivium, in a Classical school, naturally follows the age appropriate learning styles. At all stages and in all subjects, the teachers will focus on social emotional learning through featured values and virtues that are pre-programmed into each month of instruction. From campus wide to classroom and lesson specific, opportunities to model, discuss, find in history or literature the value of the month will be suggested and trained. One of the most important aspects of quality instruction is meeting each student where they are academically and growing their skills to achieve grade level mastery. Differentiation is a critical component of achieving academic growth. As such, teacher training on differentiation techniques, dedicated time for differentiation to occur in the classroom, intentioned focus on whole class and small group, progress monitoring through a robust data based instruction program are all important parts of the Cato Academy model.

**Addressing Target Population Needs for Improved Achievement** In order to address the academic excellence, Cato Academy will utilize research backed support programs to monitor Tier 1 to 3 interventions. The teams responsible for improved achievement include the formation of: **RTI/MTSS Multi Tiered System of Supports (MTSS) Team – and ARD Committee as needed.** The framework that Cato Academy will implement their MTSS/RTI program will be based on the facts that: **1.** Every student learns and achieves to a high standard. **2.** Learning includes academic and social emotional skill sets. **3.** Every member of the school teaching staff and leadership are lifelong learners. **4.** Every adult at every level is responsible for every student.

The school will create a committee to review academic performance of individual students and teachers and implement a learning plan to ensure success of all students. The analysis will include: **1.** High quality, differentiated core instruction in an environment that is responsive to social, emotional and academic and behavior goals. **2.** Data informed decision making. Review of goals, prior data, improvement and trends. **3.** Progress monitoring using benchmark testing. **4.** Layered hand offs for a continuum of academic, social, emotional and behavior supports. **5.** Family, School and community partnerships. **6.** Professional Development offerings and tailoring to meet the particular needs of a teacher or the entire school. The RTI/MTSS will use the Hexagon Tool as their framework for evaluation of the schools effectiveness to implement a successful intervention program.



The Hexagon Tool is a framework to score a schools ability to react and sustain a comprehensive program. The Hexagon Tool (Hexagon Tool – Laurel Kiser, Karen Blasé, and Dean Fixsen 2013) includes the MTSS/RtI team grading the schools capacity at any given time of the following – 6 Point Plan Includes: **1.** Needs of students; how well the program or practice might meet identified needs. **2.** Fit with current initiatives, priorities, structures and supports , and parent/community values. **3.** Resource Availability for training, staffing, technology supports, curricula, data systems and administration. **4.** Evidence indicating the out comes that might be expected if the program or practices are implemented well. **5.** Readiness for Replication of the program, including expert assistance available, number of replications accomplished exemplars available for observation, and how well the program is operationalized. **6.** Capacity to Implement as intended and to sustain and improve implementation over time.

**Training and Implementing A Successful MTSS Program at Our School** Staff members have the knowledge and skills provided through professional development and other means necessary to implement the State of Texas, TEKS standards and MTSS with fidelity. In order to ensure fidelity and sustainability of MTSS implementation, all educators should receive initial and on going professional development so that they have the knowledge and skills necessary to deliver effective core instruction and make data-based decision about student progress in mastering concepts. The following recommendations for training of the school staff comes from research on implementation of evidence based practices (Fixsen, et al 2003). **1.** Emphasize practice and use of feedback on practice to teach the finer points. **2.** Use practice sessions to help trainee teachers integrate practice and doing. **3.** Provide guidance with respect to the boundaries of using the technique, describing when it may be useful and when it may not be useful. **4.** Provide guidance on the flexible use of the core contents of the MTSS program. **5.** Encourage peer and administrative support and buy in.

An effective professional development program should include information on; **1.** What content is being taught, high level strategies to teach the content and the type of student work that demonstrates mastery of the content, as well as likely areas of student misconceptions and how to address them. **2.** How to implement, evaluate, and support interventions for students. **3.** How to monitor progress, including collecting, displaying, interpreting, and using performance data to maximize the impact of instruction on student work and achievement. **4.** How to evaluate student trajectories of learning to determine the need for instruction l intervention, and engagement in effective problem solving and decision making. **5.** How to communicate and celebrate outcomes of the MTSS process with school district an staff. **6.** How to engage with parents and caretakers about the multi-tiered process, communicating ways they might support their student and developing procedures for notifying parents and caretakers about student progress. (<https://www.cgcs.org/>)

**Tier 3 interventions** – As merited, based on the status of students academically after prescribed interventions outlined and monitored by the MTSS/RTI teams, Cato Academy will establish and Academic Accountability Committee (AAC) that will convene after each benchmark test (NWEA-MAP). AAC will closely monitor and approve the improvement plans for Tier 3 students, those with a high discipline occurrence or students at risk of being held back. Students will be flagged for AAC review and possible intervention from the following sources: **1.** Referral by the MTSS/RTI team - referral would include data points from the subject teachers, benchmark testing (NWEA-MAP), and strategies the MTSS/RTI teams implemented in Tier 1 and Tier 2. **2.** Referral by a teacher or administration – referral would include data points,



interventions attempted to date, and disciplinary actions. **3.** Failure to pass an English or mathematics core course. **4.** Review of End of Year state exams that are problematic.

The AAC team will be made up of the teaching team (math, ELA, history, homeroom), a representative of the Administration, and a member of the Special Education team if that merits. Parents will be encouraged to engage and be involved in the AAC process via in person meetings or face to face. Parents will be involved in decision making regarding interventions and will be provided copies of progress monitoring. Parents will be instructed on ways to help their child at home to maximize the impact of the aggressive interventions. If the student's issue is surrounding discipline or mental health issues, the AAC will provide the parent with community resources support their family. These Tier 3 intensive supports are aimed at students in need of individualized, immediate and long term supports.

The AAC develops a plan through analyzing various data points and implementing a personalized plan for the at risk student. The team will analyze each outcome with the following framework: **1.** Is the intervention plan appropriately matched to the student? **2.** Did the problem solving plan address the whole student, taking into account the student's academic outcomes AND social emotional behavioral needs? In keeping with the mission of Cato Academy to educate the whole student, the integration of needs are paramount. **3.** If the interventions are working for the student, does the team see the results in the classroom, in the assessment data and in the behavior modifications? **4.** If the student is not progressing under the AAC team plan, is it execution on the part of the school or some outside factor? **5.** Does the student require referral to an MTSS/RTI, up to and possibly including screening for special education services?

## **Strategies for Assessment of Learning and Data-Driven Instruction**

**The Assessment Plan:** The Cato Team has put forth a comprehensive assessment strategy detailed in this application which addresses; formative and summative assessments at the classroom level, Exit Tickets (Unit assessment targets aligned to TEKS across all subjects) and I Can Statements (individual TEKS learning strand broken down to individual lessons as well as national benchmark assessments (NWEA-MAP) to identify learning gaps and ensure academic growth. Summative and benchmark data points will be administered by the classroom teacher using TEKS, I Can Statement, and Exit Tickets which will be provided for easy reference to the teaching staff. For benchmark assessment NWEA will be used for K to 8<sup>th</sup> grades. Dibles Next will be the diagnostic test for early literacy in K3. Teachers will be trained in their role in data interpretation as well as teaching strategies to address learning gaps. The Principal will be responsible for implementing and monitoring the Cato Academy 8 Step Data Interpretation protocol which teachers implement after each benchmark assessment. For literacy Cato Academy will implement a three Tier Intervention strategy and RTI as described under intervention strategies below.

The Cato Academy Governing Board will receive quarterly reports on academics in the form of a formal report generated from the Academic Accountability Committee (AAC). The AAC will monitor assessment data, pop in observations of teachers by the PD team and Administration and oversee curriculum choices, implementation and suggest adjustments to the Professional Development plan. For all grades, NWEA Map assessments will be shared with the families after each assessment. Dibles Next data will be shared with K3 families whose students that fall below standard for early literacy. Teacher generated grades from formative and



summative assessments. The Principal will have ultimate responsibility for academic achievement and will be provided the resources to address any deficiencies.

Teachers will be provided with general grading and assessment framework to guide their classroom grades. Assumptions: Grades are not the best motivator for learning and Grades are an important communication tool. Expectations: Grades should be updated weekly in the electronic grading system 50% of total points should be ***Success Opportunities***. If you follow the instructions, do your best, and turn it in on time, you should be able to earn these points.” And 50% of total points should be ***Reality Checks*** “How your current skill level measure-up to an external benchmark.” The following framework will guide the grading for reporting to Administration and families. The following rubric by grade will be expected: For K2 classes; 20% test and quizzes, 80% class work and homework. For 3<sup>rd</sup> to 5<sup>th</sup> teachers; 20% tests and projects, 20% quizzes, 20% writing (across curriculum) and 40% class work and homework. For 6<sup>th</sup> to 8<sup>th</sup> grade 30% tests and projects, 20% quizzes, 20% writing (across subjects), 30% class work and homework.

**Monitoring and Oversight of Assessment Plan:** School Principal will direct and create and Academic Accountability Committee (AAC) to monitor curriculum, assessment data and instruction. The AAC will include the Principal, Vice Principal, PD coaches and master teachers. AAC will review benchmark data and teacher generated unit grading data to ensure academic growth in alignment with school wide goals. Historic analysis of prior year STAAR results will occur over the summer during curriculum and assessment planning. Gaps between benchmark and STARR end of year academic data may prompt a closer look at individual teacher formative and summative testing plans and curriculum.

Formative Assessment: throughout the lesson, the teacher will regularly check for understanding using various techniques including; Class Response Systems, Q&A, Exit Tickets, etc. The criteria for success is the ability of a student to accurately define the subject matter being taught. Summative Assessment: at the end of unit of instruction teachers will provide opportunity for students to demonstrate their mastery of a subject through a number of different assessment strategies up to and including; text analysis, close reading interpretation of a text, written or oral presentations, opinion or compare and contrast analysis of one or more subjects. Tests and quizzes and final exams are all tools to ensure mastery. NWEA-Map Student Assessment - uses anonymous assessment data from over 10.2 million students to create national norms. Educators compare their students’ performance against norms to improve instruction. The norming against multiple state standards is a critical component of the MAP program. MAP testing data will provide valuable feedback to ensure that our proprietary curriculum is aligned for quality instruction. With aligned curriculum and predictive testing data, the Professional Development team and site-based administrators can quickly and accurately guide teacher training.

1. **To differentiate instruction.** MAP Growth data makes it easy to identify students’ different learning levels, so teachers can engage in differentiated instruction and ability grouping that leads to positive results for every student.
2. **To evaluate curriculum programs.** MAP Growth data have become a key component in assessing the impact of specific curriculum programs. MAP Growth scores contribute to understanding what works, so when special programs are instituted, educators can see precisely how much growth has occurred with participating students.
3. **To use as a universal screener/RTI placement tool.** Universal screening tools can be used to identify students at risk of academic failure and to inform a learning plan. Grade-independent MAP Growth assessments received the highest possible rating for classification



accuracy and high ratings in all other categories from the Center on Response to Intervention (<http://www.rti4success.org/>). 4. **To project proficiency on state tests.** MAP Growth items enable NWEA Research to analyze students' performance on MAP Growth as compared to other assessments. From there, NWEA researchers create state-specific linking studies that predict proficiency on state accountability assessments, as well as college readiness linking studies that predict college readiness for grade 5+ students as measured by ACT benchmarks.

NWEA benchmark assessments will occur 3 times per year to provide the administration and instructional staff with data that can be acted upon with respect to deficiencies and ELA and math academic growth. Internal Benchmark Assessment: NWEA measures students beginning in grade 2 and continuing through grade 8. Time frame for benchmark NWEA testing: Map Test 1 - August - **Early August (to determine the academic level of all students)**. NWEA – Map Test 2 - November – (12-14 weeks from prior benchmark. NWEA – Map Test 3 - March 4th – (12-14 weeks from prior benchmark. NWEA – MAP Test 3 – Optional post STAAR assessment for calibration

The proposed plan for assessment and the work of the teachers and AAC will provide a fluid process for modifying curriculum and instruction based on measurable data. The assessment plan will also provide ample time for the teachers to reflect on the personalization strategies used and proactive, academic interventions. Early literacy monitoring via Dibel Next will signal Tier 1, 2 or 3 intervention strategies up to convening and Response To Intervention Team (RTI) and pull out intervention plans as needed.

Additional Assessment Options used in the school. The following assessment data will be analyzed on a per scholar basis; DIBELS- Dynamic Indicators of Basic Early Literacy Skills, Teacher developed pre-assessment and post-assessment, Teacher developed rubrics for writing and oral skill mastery (TEKS ELA standards 1, 11 and 12). Math Fact Fluency Assessment goals by grade (NWEA, iStation). RIT Word Fluency Assessment goals by grade (as gaps are identified in NWEA-MAP). Math Progress Monitoring Assessments. Scholar Report Cards and progress monitoring . Historic review of Texas STAAR results by grade band.

Teachers will be trained on an 8 Step Data Interpretation Plan which shows the teachers how to interpret class wide and small group and individual learning needs is the first step in a Data Informed Instructional school. The 8 Step Data Interpretation Plan includes review by grade level teachers, communication to the home and with the students. The plan culminates with goal setting with the students and class and reporting and monitoring those goals to the Academic Accountability Committee (AAC). To be a great school we must have systems in place to inspect what we expect.

Assessment and Screening – Special Populations; Scholars already enrolled in the Cato Academy special education programs will be monitored with quarterly progress reports documented and shared with the classroom teacher, administration and the parents/guardians of the scholar. Annual reviews of the IEP will occur and determinations will be made if reevaluations and adjustments are required.

#### **Remediation and Intervention Explanation**

The Cato Academy system has elected test each student in early August and right before Christmas break and early March with the NWEA MAP online test. Results will be analyzed by the leadership team and each teaching group will identify the areas their students need additional support in.



Data Informed Instruction - Using internal assessment data the teacher and AAC team can quickly isolate low scores and determine if the issue is curriculum based or isolated to a particular instructor. With a curriculum that is paced correctly and which calls out the various standards to be focused on during the particular unit, we can assure that we have a common foundation from school to school. With the data broken down by strand a series of intervention programs will be employed to achieve maximum student growth; **1.** Study Hall or one on one tutoring with the teaching staff. All teaching staff is contractually required to scheduled two hours per week for tutoring. **2.** Purposeful Pause in content delivery if entire portions of a class need assistance. **3.** Dedicating class time to differentiate in 'Crash Course' by strand instruction. **4.** Advanced (Gifted and Talented) scholar strategy to challenge students who can advance beyond their grade level. **5.** Differentiated Instruction – and the training needed for all teachers to successfully implement differentiation techniques in their classroom. **6.** Progress monitoring with additional testing on standards that need additional support. **7.** Move to Intervention department under a pull out model. Third party cloud based subscription services such as iStation, iReady – Study Island - Wilson Foundations. **8.** Parent Volunteers and or tutor clubs

The ability to meet the needs of a diverse student population who joins a new school at different educational levels is one of the major benefits of the planning work of curriculum resources and the Schoology Learning Management System. The customization, ability to adjust pacing, the ability to flip or blend the classroom and the tools to look backward and forward and the data that supports higher outcomes for students in Classical education models are all reasons Cato Academy chose to partner with Schoology for content delivery and customization. For math instruction, the teacher has at their disposal years prior lessons and learning targets to pull from should learning gaps and foundational skills show up as lacking. This ability to quickly search and customize math lesson planning ensures that benchmark is actionable. Lesson plans are checked to ensure that teachers are reacting and remediating instruction based on test data.

**Intervention Tier Plans and Process For INDIVIDUAL Poorly Performing Students:**  
**Step 1 -Referrals to RTI** RTI team will review academic performance of individual students that need supports above and beyond classroom interventions. The RTI team will implement a learning plan to ensure success of all students. The analysis will include:

- High quality, differentiated core instruction in an environment that is responsive to social, emotional and academic and behavior goals. (monitored by the PD and Admin team)
- Data informed decision making. Review of goals, prior data, improvement and trends.
- Progress monitoring using benchmark testing.
- Layered hand offs for a continuum of academic, social, emotional and behavior supports.
- Family, School and community partnership as available.
- Professional Development offerings and tailoring to meet the particular needs of a teacher or the entire school.

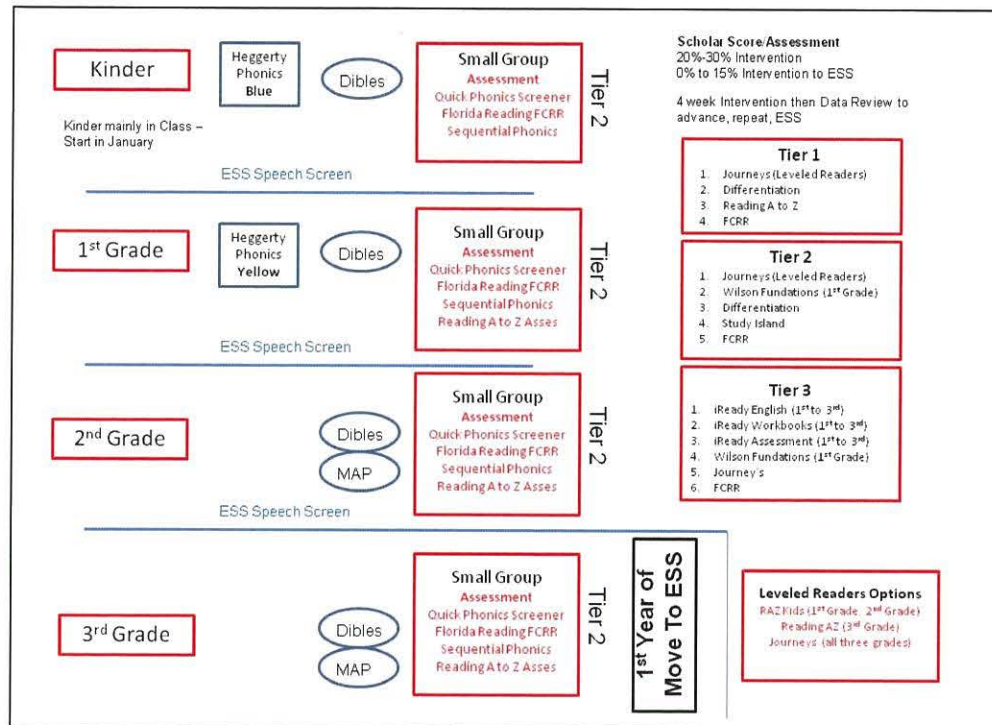
**Framework For Cato's RTI Process:** The Hexagon Tool<sup>26</sup> is a framework to score a schools ability to react and sustain a comprehensive program. The Hexagon Tool includes the RTI team grading the schools capacity at any given time of the following – 6 Point Plan Includes: **1.** Needs of students; how well the program or practice might meet identified needs. **2.** Fit with current initiatives, priorities, structures and supports , and parent/community values. **3.** Resource

---

<sup>26</sup> Metz, A. & Louison, L. (2018) The Hexagon Tool: Exploring Context. Chapel Hill, NC: National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill. Based on Kiser, Zabel, Zachik, & Smith (2007) and Blase, Kiser & Van Dyke (2013).



Availability for training , staffing, technology supports, curricula, data systems and administration. **4.** Evidence indicating the out comes that might be expected if the program or practices are implemented well. **5.** Readiness for Replication of the program, including expert assistance available, number of replications accomplished, exemplars available for observation, and how well the program is operationalized. **6.** Capacity to Implement as intended and to sustain and improve implementation over time.



Tier 1 and 2  
- Classroom Differentiation -  
 Once scholar's skills needs have been identified, teachers will implement a differentiation strategy that best fits their unique class dynamics. The methods that teachers are trained on by our Professional Development team and the process administration is tracking include;

Lessons that are differentiated by a choice of content, process or outcome goal. The grouping will be done by student interest, skill readiness or learning profile. The tactics employed by the teacher in the classroom will include flexible grouping, student choice, and centers. Ongoing monitoring and adjusting are crucial to a successful differentiation program.

The Cato Academy English Program allows for three, 45 minute segments. The third segment of each day is designed for **small group instruction and differentiation** for struggling readers. In Kinder to 3rd Grade the focus on the ELA program is on encoding, decoding, comprehension and making connections to fiction and non-fiction text. The evidence based protocol of the K3 ELA program will include practices that enable teachers and students to focus on building foundational skills, fluency, comprehension and knowledge. Time is built into each day for intensive differentiation should the data point at issues. This occurs in the classroom. The teacher has resources including leveled readers, targeted phonics programs and digital tools from iStation, Edmentum and others. This is in line with our philosophy on the ability of young children to memorize basic facts and fundamental rules, and to absorb information and knowledge more easily at a younger age. The ELA program aligns with the latest research on literacy instruction and aligns with the mission and vision of Classical Education in the following ways; **1.** Utilizes all learning styles: visual, auditory, kinesthetic. **2.** Never teaches isolated concepts. **3.** Incorporates scholar/teacher interaction. **4.** Uses repetition to attain mastery. **5.**



Challenges accelerated scholars. **6.** Promotes higher-order thinking. **7.** Provides the connection between grammar skills, writing and effective speaking.

Tier 3 - Pull Out Intervention: Certain scholars will be identified as needing beyond classroom support and will be enrolled in the Cato Academy Intervention Program. Tier 1 and 2 interventions primarily occur with the classroom teacher. Tier 3 interventions for struggling early readers involve identification and constant monitoring and small group pull out instruction. In the intervention department, that team has a number of digital options including the, iStation (math, ELA), iReady English program and workbook as well as the iReady assessment tool to monitor progress. Wilson Foundations will be available on an as-needed basis.

## **Supports for Special Populations**

### **Special Education Scholars and English Language Learners**

The learning community of Cato Classical Academy will consist of scholars with a wide range of learning abilities and special needs. The leadership of Cato Academy has built a special populations program that takes into account best practice, TEA goals and frameworks (TEC Chapter 29, A, B, D), and Federal rules and laws including: Title VI of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972, which prohibit discrimination on the basis of race, color, sex, and national origin. Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990, which prohibit discrimination on the basis of disability. Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974 (EEOA), and the Individuals with Disabilities Education Act (IDEA).

We are anticipating 10% of our student population will qualify for IEP services. Scholars with special needs will receive the services as outlined in their Individual Education Plan (IEP). Our teachers will work closely with administration, Special Education teachers, contracted service provider, parents and any IEP team member(s) to ensure that the implementation of an IEP is effective and meets the requirements as stated in the document. Specific training through experts in the field of Special Education will be made available to the faculty and staff of Cato Academy in order to both meet the needs of the special needs scholar and to meet all state and federal laws regarding Special Education. IEPs will be reviewed and revised on an annual basis by special education staff along with educational evaluations performed by a school psychologist or other related service providers as needed.

Year 1 we have budgeted to hire a Special Education Specialist and a SPED Assistant as needed. The Superintendent will locate and contract outside SPED specialists as needed to include, Speech Therapists, Occupational Medicine Therapists, Psychologist. Cato Academy will hire a certified Special Education Teacher and one paraprofessionals who will be responsible for managing the special education needs of the projected enrollment.

**Individual Education Plan (IEP) – Free and Appropriate (FAPE) and Least Restrictive Environment** -Intake for scholars with existing IEP's and the placement of scholars with initial IEP's will have the following protocols for placement: **1.** The placement decision for each child will be: Made by a group that includes; Cato Academy school staff including the Special Education team and allied third party professionals (Speech Path, School Psych, Occ Med etc.) The parents and other persons knowledgeable about the child, about the meaning of the evaluation data, and about the placement options; In conformity with the Least Restrictive Environment provisions of the IDEA regulations; Determined at least annually; Based on the child's IEP; **2.** Unless the IEP of a child requires some other arrangement, the child will be



educated in Cato Classical Academy classroom environment. **3.** In selecting the Least Restrictive Environment, consideration will be given to any potential harmful effect on the child or on the quality of services that she or he needs. **4.** A child with a disability will not be removed from age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

**Identification and Screening of Scholars** As required by school policy and Federal law, Cato Academy, must ensure that a free appropriate public education (FAPE) is available to all children with disabilities even those attending private schools and home schools, regardless of the severity of the disability and those who are in need of Special Education and/or related services, are identified, located and evaluated. **1.** Cato Academy has established, implemented, and disseminated to its school-based personnel and all parents written procedures for the identification and referral of all children with disabilities aged Kinder through 8<sup>th</sup> grade. **2.** Cato Academy will require all school-based staff to review the written procedures related to child identification and referral on an annual basis and will maintain documentation of the staff review. **3.** Identification (screening for possible disabilities) shall be completed within 45 calendar days after: **4.** Entry of each kindergarten scholar and any scholar enrolling without appropriate records of screening, evaluation, and progress in school; or Parent notification of concern regarding developmental or educational progress by their child grades kinder through 8<sup>th</sup> grade. **5.** Screening procedures shall include vision and hearing status and consideration of the following areas: Cognitive or academic; Communication; Motor; Social or behavioral; and Adaptive development. **6.** For a scholar transferring into a school, the public agency shall review enrollment data and educational performance in the prior school. If there is a history of special education for a scholar not currently eligible for special education or of poor progress, the name of the scholar shall be submitted to the administrator for consideration of the need for a referral for a full and individual evaluation or other services. **7.** If a concern about a scholar is identified through screening procedures or review of records, the parents of the scholar shall be notified of the concern within 10 school days and informed of the public agency's procedures to follow up on the scholar's needs. Parents will be notified and invited to participate in the RTI/MTSS meeting along with special education staff, school psychologist, and/or related service providers to discuss the scholar's progress in school and create a plan to best support their scholar's learning. (in accordance with Senate Bill 1153, 85<sup>th</sup> Texas Legislature and TEC, Section 26.0081. Families will be notified by U.S. Mail and a face to face meeting with the Cato Academy Principal at the start of an SPED intervention or during a change of intervention protocol. The notice will be provided in the parent's native language as necessary and describe the assistance provided, including intervention strategies as well as the RTI/MTSS strategies employed thus far. The notification and plan will include a timeline, with progress monitoring. **8.** Cato Academy will maintain documentation (within the chosen platform, IEP-Pro) of the identification procedures utilized, the dates of entry into school or notification by parents of a concern, and the dates of screening. The dates shall be maintained in scholars' permanent records.

**Least Restrictive Environment – Inclusive Focus** The Cato Academy Special Education/ELL team will meet regarding that scholars that have been identified and classified in and IEP or 504 accommodation. These meetings will meet occur every two weeks to review the progress of at-risk scholars who are underperforming in class and on assessments using a



modified Response to Intervention (RTI) model to support scholars with the interventions needed for achievement.

At the study teams direction the tools the teacher and the Special Education team have for students with IEP's include dedicated scholar hours with the classroom teacher, differentiated instruction and parent partnering. The study team will meet and evaluate student data to determine progress and next steps. The next steps are to increase scholar hours and or targeted instruction through the reading interventionist or complete an evaluation for the purposes of consideration of qualifying special education service at Cato Academy.

The Cato special education team will service the scholar with the IEP directed number of additional minutes of instruction. A pull out of the classroom model may be determined to be the best options for IEP scholars. Once in the special education department there are a number of curriculum and digital curriculum options for scholar instruction.

Children with disabilities, including children in public or private institutions or other care facilities, will be educated to the maximum extent appropriate with children who are not disabled in accordance with §§300.114–300.117 of the IDEA regulations. Depending on the scope of the IEP requirements Cato Academy will make every effort to services children with disabilities in the classroom with their peers. A continuum of alternative placements will be made available to meet the needs of children with disabilities for special education and related services.

**Content and Delivery Modifications** Teachers will utilize a variety of tools to provide special education for scholars within the classroom environment. Every effort will be made to support teachers in finding solutions with tools and support they need to effectively individualize learning for scholars with special needs: **1.** Utilize flexible classroom models. **2.** Address IEPs with personalized learning plans. **3.** Engage all learning styles with a variety of instructional modalities. **4.** Differentiate instruction with meaningful assessment. **5.** Measure gains with real-time reporting.

**Progress Monitoring of Special Education Population.** The evaluation process for Special Education scholars will include grades and reporting from the classroom teacher as well as quarterly reports from the Cato Special Education team. Cato Academy will contract with e-IEP Pro for management of all scholars with Individualized Educational Plans (IDEA) and 504 plans. The key benefits of e-IEP Pro include: **1.** All scholar data managed in a central location. Easy access from any computer or mobile device. **2.** Allows all stakeholders quick and easy access to scholar IEP's, 504s and more. **3.** Notification of due dates, such as meetings, IEP and MET review due dates and 504 plans. **4.** Provides for documenting assessment data and eligibility data for each special education scholar. **5.** Easy paperless transfer of electronic scholar records. **6.** Document locking feature allowing IEP teams to lock down documents to protect data integrity. **7.** Integrated training videos and software support section available to all users 24/7. **8.** Notification to parents as to progress and any potential changes to the intervention plan. (in accordance with TEC Section 26.081)

Scholars already enrolled in the Cato Academy special education programs will be monitored with quarterly progress reports documented and shared with the classroom teacher, administration and the parents/guardians of the scholar. Annual reviews of the IEP will occur and determinations will be made if reevaluations and adjustments are required. Assessments utilized to determine eligibility (not limited to this list). Wechsler Intelligence Scale for Children – Fourth Edition. Wechsler Nonverbal Scale of Ability. Woodcock-Johnson – Normative Update Complete. Test of Written Language – Fourth Edition. Vineland Adaptive Behavior Scales –



Second Edition. Diagnostic Adaptive Behavior Scale. Speech and Language evaluative tools. Clinical Evaluation of Language Fundamentals – Fifth Edition. CAAP-2. LAS assessments developed by Data Recognition Corporation (DRC). Individual Special Education staff and contracts will have experience with particular tests and will use the above for monitoring.

Progress monitoring of special education populations will occur in the same manner and fashion as all Cato Academy scholars. Benchmark assessment data (DIBLES for early reading, NWEA-MAP for standards mastery) will be compiled quarterly. The Special Education and or ELL staff will follow the 8 step data analysis process which all teachers in the school follow. The final report and on student progress, goal setting plan and strategy prescribed to improve academic outcomes will be presented to the Academic Accountability Committee for review and monitoring.

**ELL Screening and Identification:** Best Practices for Teaching ELL Scholars in our Target Population include: LAS assessments developed by Data Recognition Corporation (DRC) Screening will identify student English learners that have a primary language or home language other than English and who is in the process of acquiring English language proficiency. This screening will identify students at different stages of English language development according to Title 19 of the Texas Administrative Code (TAC), Chapter 74, Subchapter A, Section §74.4(b)(2). The LPAC Framework Manual (TEA, 2018c) will be used as a framework for the committee to ensuring equitable academic opportunities for English learners and outline the responsibilities of the committee: *As an advocate for the English learners, the LPAC becomes the voice that initiates, articulates, deliberates, and determines the best instructional program for the student. It functions as a link between the home and the school in making appropriate decisions regarding placement, instructional practices, assessment, and special programs that impact the student (TEA, 2018, p. 7).*

**Language Proficiency Assessment Committee (LPAC).** The school Principal will establish a LPAC committee to monitoring the EL program effectiveness. The LPAC committee will include ELL teaching staff, administration and at least one parent representative. The LPAC committee must make informed management decisions about English learners within the programs regarding placement, instructional practices, assessment, and any other special programs that impact the student. Various student data points will be monitored and decisions will be made for the best interest of the English language learner. The goal of the LPAC establish a collaborative effort between, teachers, campus leaders, and parents within the LPAC at each campus (TAC, §89.1265(a)). Certified ESL teachers should understand their role in supporting the ongoing coordination between the ESL program and the general educational program, while ensuring that the ESL program in place is addressing the affective, linguistic, and cognitive needs of their English learners (TAC, §89.1210(b)).

**EL Modifications** - Cato Academy will accommodate the instruction, pacing, and materials so that English learners participating in their EL program have the opportunity to master the Texas Essential Knowledge and Skills (TEKS) and the English Language Proficiency Standards (ELPS) as required curriculum in all content areas (TAC, §89.1210(a)). The academic program will monitor the academic progress of the English learners on progress towards mastery of the TEKS standards and extent to which English learners are becoming proficient in English as well as the number of students who have met reclassification as English proficient (TAC, §89.1265(b)). The Cato Academy ESL focus is in alignment with the school's stated mission of being academically rigorous and promote deeper connections, and has been designed so that



instruction is "... structured to ensure that the students master the required essential knowledge and skills and higher-order thinking skills in all subjects" (TAC, §89.1210(b)(2)(A)-(B)).

**EL Academic Assessment** - Academic Progress monitoring of special education populations will occur in the same manner and fashion as all Cato Academy scholars. Benchmark assessment data (DIBLES for early reading, NWEA-MAP for standards mastery) will be compiled quarterly. The Special Education and or ELL staff will follow the 8 step data analysis process which all teachers in the school follow. The final report and on student progress, goal setting plan and strategy prescribed to improve academic outcomes will be presented to the Cato Academy, Academic Accountability Committee (AAC) for review and monitoring. Data points to be monitored include, ELL teacher assessments, NWEA-MAP benchmark assessments and ELL Made Simple – LoTi pop in observations.

**EL Classroom Pop In Observation Tool** - Cato Academy is implementing the ELL Made Simple ([ellmadesimple.com](http://ellmadesimple.com)) framework to train and monitor the ELL student population. ELL Made Simple has partnered with the LoTi pop in observation tool which the school will use for teacher evaluation and training. The LoTi ELL observation tool will be used specifically to measure the ELL population in the classroom setting. The four phases of classroom monitoring and assessing will be done by the ELL lead teacher via pop in observations done monthly. LoTi ELL pop ins will be done by the ELL teacher and monitor each general classroom teacher with ELL students in their class at least once monthly. The following framework for measurement of effectiveness will be used (as provided, trained and supported by ELL Made Simple; **1. Measuring Student Learning with H.E.A.T.** Use the LoTi ELL five-step walk-through protocol to determine how English Learners demonstrate Higher order thinking, Engaged learning, Authentic connections, and Technology use. **2. Providing Strategic and Relevant Feedback** - Refine the focus of walkthroughs in classrooms that support English Learners by using a feedback cycle that develops language proficiency and promotes academic growth. **3. Using Data to Simplify ELL Instruction** Expand the classroom walkthrough process by identifying trends that reveal instructional practices that will simplify and transform instruction for English Learners. **4. Supporting English Learners in Every Day** Connect instructional and learning frameworks with language proficiency standards to leverage high impact feedback and learning for English Learners in any classroom setting.

Students must be kept in the EL program only as long as needed for them to develop adequate English skills that will allow them to participate meaningfully in the regular instructional program for their grade level. As with the initial EL assessment, students who may be eligible for exiting the EL program should be tested with an objective assessment that has been validated for this purpose. Generally, students are tested annually at the end of the year; the Cato Academy LPAC committee will give these exit assessments at other times during the year if a teacher or parent requests.

Cato Academy will monitor the academic performance of former EL students for two years following their exit from the program to make sure they can participate meaningfully in the regular educational program. Ongoing monitoring post exit of the EL program will include: (1) whether former EL students is able to perform comparably to their non-EL peers in the regular educational program; (2) whether they can participate successfully in essentially all aspects of the school's curriculum without the use of simplified English materials; and, (3) whether their retention in grade and dropout rates are similar to those of their non-EL peers. Data will be



collected using the same tools as used by the classroom teacher (benchmark assessments, formative and summative grades, semester grades, etc.)

**Tier 1** Core instruction adjusted to meet each EL's language proficiency level and cultural connections are provided 70 – 80% **Tier 2** Supplemental Interventions are adjusted to meet each ELL's language proficiency level and cultural connections are provided. An additional 10 minutes of oral language development provided to support lessons. 15-25% **Tier 3** Intensive Interventions continue to be adjusted to meet ELL's language proficiency level and cultural connections are provided. An additional 10 minutes of oral language development is provided to support lessons. 5-10%

EL teachers will be certified to teach in the school.

**ELL student – Family Outreach** – The mission statement at Cato Academy states that we purpose to partner with supportive parents, for ELL populations this commitment continues as families, teachers and administration play an integral part in assisting parents in supporting their child's academic success. In building a partnership between the parents, the school, and the community, ESSA (2017) spells out that schools that receive Title I funds to "...educate teachers, specialized instructional support personnel, principals, and other school leaders with the assistance of parents in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school" (Title I, Part A, Section 1116). Strategies for parent involvement may include anything from honoring a time and place for homework to providing communications in the parents native language, to taking interest in their child's education by asking their child or the teacher questions and interacting with their child at home by reading or telling stories in their primary language (Breiseth, Robertson, and Lafond, 2011).

A gifted Scholar gives evidence of high achievement capability in areas such as intellectual, creative, artistic, or leadership capacity, or in specific academic fields, and who need services and activities not ordinarily provided by the school in order to fully develop those capabilities.

The curriculum and mission of Cato Academy is rigorous academic expectations. All students will receive rich content and above grade level opportunities to read and dissect literature. Our academic model includes for all students, differentiation methods to be trained, monitored and tracked, and academic model that focuses on acceleration, depth and complexity, higher order thinking skills and content extensions. A standard in all our classrooms is teachers that employ large groups, small group instruction, and targeted interventions for low and high achieving scholars. The Pearland ISD has 9% of their population as Gifted and Talented (<https://schools.texastribune.org/districts/pearland-isd/>) which Cato Academy will budget in their enrollment estimates.

Gifted/Talented scholar identification will be determined by testing that show the scholars test in the 95th percentile and above on norm-referenced standardized test. These testing options will be chosen by the site Principal in identification of Gifted/Talented scholars; Naglieri Test of Nonverbal Ability (NNAT), Cognitive Abilities Test (CogAT), Otis-Lennon School Ability Test, IOWA Test of Basic Skills (ITBS), NWEA-MAP. Additional data: anecdotal records, interviews, observations, characteristics, checklists will be considered in identification. Teacher will refer scholars to the RTI/MTSS team when the student is identified as needing an advanced academic challenge. In the 6<sup>th</sup> to 8<sup>th</sup> grades scholars that are above grade level in math



can enroll in a grade ahead math classes. Cato Academy will offer Algebra 1 (a typical 9<sup>th</sup> grade course) to all scholars that qualify. Addition advanced math classes will be made available using teacher guided online tools.

Cato Academy will implement academic interventions such as accelerating a student in a single subject, compacting curriculum, concurrent enrollment, advanced placement or customized advanced courses in the Schoology LMS Curriculum module, allow teachers to customize academic programs, independent academic studies, grade acceleration.

The framework for a Gifted and Talent program will be based on the Education Strategies for the Gifted and Talented as defined by the Section 29.123 of the Texas Education Code (TEC), the State Plan for Gifted and Talented standards of services and accountability.

Gifted and talented students and those with high abilities will receive gifted education programs that will challenge them in regular classroom settings and enrichment and accelerated programs to enable them to make continuous progress in school. **§89.1 Student Assessment. Texas**

**Education Code.** The Cato Academy Governing Board will develop policies for identifying and monitoring of the gifted/talented population. This policy will (1) include provisions for ongoing screening and selection of students who perform or show potential for performing at remarkably high levels of accomplishment in the areas defined in the Texas Education Code, §29.121; (2) include assessment measures collected from multiple sources according to each area defined in The Texas State Plan for the Education of Gifted/Talented Students (including school selected NWEA-MAP benchmark assessments); (3) include data and procedures designed to ensure that students from all populations in the school have access to assessment and, if identified, services for the gifted/ talented program; (4) provide for final selection of students to be made by a committee of at least three school educators who have received training in the nature and needs of gifted students; and (5) include provisions regarding furloughs, reassessment, exiting of students from program services, transfer of students, and appeals of the charters decisions regarding program placement. Source: The provisions of the §89.1 adopted to be effective September 1, 1996, 21 TexReg 5690.

Educational acceleration will be the cornerstones of the Cato Academy gifted education practices, with more research supporting this intervention than any other in the literature on gifted individuals. The practice of educational acceleration has long been used to match high-level students' general abilities and specific talents with optimal learning opportunities. Strategies for K5 and 6<sup>th</sup> to 8<sup>th</sup> will take into account class scheduling and in classroom opportunities to address this special population.

**§89.5 Program Accountability.** School districts shall ensure that student assessment and services for gifted/talented students comply with accountability standards defined in the Texas State Plan for the Education of the Gifted/Talented. Source: The provisions of this §89.5 adopted to be effective September 1, 1996, 21 TexReg 5690.

Cato Academy teachers will employ instructional strategy condenses, modifies, or streamlines the regular curriculum to reduce repetition of previously mastered material. "Compacting" what students already know allows time for acceleration or enrichment beyond the basic curriculum for students who would otherwise be simply practicing what they already know. The curriculum mapping and scope and sequencing allows for deeper dives into topics and standards. With the Schoology LMS, the teachers have the ability to reach forward multiple grades to create challenging lessons for scholars that are ready for greater challenges. **§89.3 Student Services and Curriculum/Pacing Modifications for Gifted and Talented.** Cato



Academy will provide an array of learning opportunities for gifted/talented students in kindergarten through grade 8<sup>th</sup> and shall inform parents of the opportunities. Options must include: (1) instructional and organizational patterns that enable identified students to work together as a group, to work with other students, and to work independently; (2) a continuum of learning experiences that leads to the development of advanced-level products and performances; (3) in-school and, when possible, out-of-school options relevant to the student's area(s) of strength that are available during the entire school year; and (4) opportunities to accelerate in areas of strength. Source: The provisions of this §89.3 adopted to be effective September 1, 1996, 21 TexReg 5690

The practice of grouping will be implemented where appropriate.

An important part of all teacher training at Cato Academy includes strategies for effective differentiated instruction for advanced and struggling students. The school is committed to training and monitoring effective differentiated instruction. **§89.2 Professional Development.** In addressing the gifted/talented population, the charter school program shall ensure that: (1) prior to assignment in the program, teachers who provide instruction and services that are a part of the program for gifted students have a minimum of 30 hours of staff development that includes nature and needs of gifted/talented students, assessing student needs, and curriculum and instruction for gifted students; (3) teachers who provide instruction and services that are a part of the program for gifted students receive a minimum of six hours annually of professional development in gifted education; and (4) administrators and counselors who have authority for program decisions have a minimum of six hours of professional development that includes nature and needs of gifted/talented students and program options. Source: The provisions of this §89.2 adopted to be effective September 1, 1996, 21 TexReg 5690; amended to be effective February 13, 2000, 25 TexReg 776.

## School Culture and Safety

Enter narrative response to the prompts in this section of the application. *Reference Attachment 8 in the response.*

**Culture** — A positive culture is critical to a successful school. More than just window dressing, the Governing Board is committed to building a strong culture and measuring those efforts with quantitative metrics. The combination of academic success, financial viability and a strong culture where teachers want to teach and students are excited to learn is the formula for a long and successful school. Tool to Measure Culture: Net Promoter Score measurements of satisfaction in the school. The NPS score survey will be conducted by the School Advisor Council (SAC) annually and presented to the board before May. Stakeholders surveyed will include; Teachers, Staff, Admin, Parents. The simplicity of the Net Promoter School is why it is so powerful. Once simple question is asked: "How likely are you to refer a friend to Cato Classical Academy?" Respondents are grouped as follows: **Promoters** (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth. **Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

**Detractors** (score 0-6) are unhappy customers who can damage your brand and impede growth



through negative word-of-mouth. **Timeline for Achieving Goal:** Beginning in year May of year one, the Governing Board is holding the school Principal to the target of 7 or above. The School Advisory Committee (SAC), which meets quarterly and is made up of parents, teachers and Admin provide an annual Net Promoter Score report to the Governing Board at the end of each year.

The foundations of the Cato Classical Academy culture is based on research by Dr. Rudolf Dreickurs an Adlerian psychologist whose life work who suggested that human misbehavior is the result of feeling a lack of belonging to one's social group. When this happens the child acts from one of four "mistaken goals": undue attention, power, revenge or avoidance (inadequacy). Dreickurs' overall goal was that students would learn to cooperate reasonably without being penalized or rewarded because they would feel that they are valuable contributors to the classroom.<sup>27</sup> This simple theory is the basis for student success and the root of discipline issues in a school. The power of relationships between the teacher and the scholar is the foundation of academic and life success of the scholar. To simplify the theory the Teddy Roosevelt quote; 'People won't **care** how much **you know until they know** how much **you care.**' opens the door to learning and is modeled in all aspects of Cato Academy.

Continuing with Dr. Dreickur's theory, Dr. William Glasser laid out Choice Theory<sup>28</sup> which is the idea that the behavior of children is related to five basic needs; survival, love and belonging, power and significance, freedom and autonomy, and fun. Both Dreickurs and Glasser offer concrete techniques to be employed in the classroom to manage discipline issues and set the classroom up for a year of success.

Dr. Dreickurs 1. Always speak in positive terms, never be negative 2. Encourage students to strive for improvement, not perfection 3. Emphasize student strengths while minimizing weaknesses. 4. Help students learn from mistakes, which are valuable in learning 5. Encourage independence and the assumption of responsibility 6. Encourage students to help each other 7. Be optimistic and enthusiastic – a positive outlook is contagious.

Dr. Glasser and Choice Theory: **1.** Stress Student Responsibility **2.** Set Classroom Rules **3.** Accept NO EXCUSES **4.** Teach Students to Make VALUE JUDGEMENTS **5.** Suggests Reasonable ALTERNATIVES – lay out CONSCUENCES **6.** Be CONSITANT and REVIEW your STRATEGY often

These foundational elements (Classical/Trivium, Charlotte Mason, Drs. Druikers and Glasser) permeate our teacher training and expectations, our school leadership beliefs, our board governance and classroom activities.

Each student deserves: An environment where teachers, support staff, and administrators lead by example and model what is good, true and beautiful. **1.** Our campus will work to foster meaningful student-faculty-parent interaction, in alignment with the Adlerian philosophies of Dr. Rudolf Druikers and Dr. William Glasser which focus on the power of relationships. **2.** A time tested, standards aligned curriculum that is designed to the needs, strengths, abilities, and learning style of each student to maximize student achievement; **3.** An environment reinforcing the Charlotte Mason philosophy that every individual has a unique potential that can be developed, while understanding that not every student can be successful all of the time; **4.** An open and receptive learning atmosphere that respects and encourages the individual ideas and

---

<sup>27</sup> Rudolf Dreickurs – Wikipedia - [https://en.wikipedia.org/wiki/Rudolf\\_Dreickurs](https://en.wikipedia.org/wiki/Rudolf_Dreickurs)

<sup>28</sup> William Glasser Institute – Choice Theory - <https://wglasser.com/our-approach/choice-theory/>



intellectual pursuits of every student and faculty member; **5.** Instructors that receive continuing education on the delivery, planning, academic and emotional benefits of a Classical education.

The culture at Cato Academy is one of; High Expectations of the Scholars and Families; Rigorous Academics; The Power Of Relationships – “People Don’t Care What You Know...Until They Know You Care”; Balance between subjects (Math is as important as Music); Values and Virtues are built into everything we do in the classroom, in the offices and on the playground; Life Long Learning – from Scholars and Teachers alike; Discipline as teaching moments; Every Scholar Matters – Every Scholar Has A Story; Respect of the Teaching Profession; Robert Greenleaf – Servant Leadership from the Governing Board to the Admin to Teachers to the Custodian. The singular focus is to serve scholars and families.

This application details the myriad of ways that these above culture norms are executed at every level, day in and day out.

The Cato Academy Discipline Policy reflects who we are as an organization and remains compliant with the legal mandates of school discipline. We believe it to reflect:

**Our Discipline Mission:** Consistent with the values we pursue in our mission statement.

**Core Values:** Academic Excellence, Partnering with Families and Children & Learning

**Relational Discipline** highlighting the parent-teacher-scholar relationship to bring out the best in the child. Teachers and scholars developing meaningful relationships will only increase the scholar’s sense of belonging to the school.

**Guiding Principal: 1.** Life lessons, accountability, responsibility and discipline are taught through natural consequences, rather than “punishment”. **2.** Teachers and scholars developing meaningful relationships will only increase the scholar’s sense of belonging to the school. **3.** Developing positive relationships is based on the Golden Rule – “Treat others as you would want to be treated yourself”.

**School Operation:** Learning is fun in a safe, interactive, vibrant and challenging environment. Everyone has the responsibility to contribute to the greater good of the school community. Recognizing the value of discipline policies and procedures in order to meet the Mission of our school for all stakeholders.

Introducing Teachers and Parents on Discipline Model: Prior to starting the school year, the teaching staff receives cultural training on the foundation of Dr. Druikers and Dr. Glasser and how their theory on relationships best serves students. During this training, the school Principal will explain the levels of infraction and the teacher’s role in discipline. A break down of tactics by infraction will be presented and a clear definition of what actions will be sent to the administration for further discipline up to and including suspension and expulsion.

Each parent will be provided a school discipline handbook as part of their parent handbook. All Parent/Student handbooks, including the discipline metrics will be available on the Cato Academy web site.

**Dress Code:** The Governing Board is requesting a flexible uniform including solid colored polo shirts, with or without the Cato Academy logo and tan or navy blue pants, knee length shorts or skorts. The teachers will be expected to dress professionally.

**School Safety:** Safety is a major reason parents chose a school. A recent Georgia GOAL<sup>29</sup> survey 754 parents as to why they chose a private school and school safety was in the top 5. Top Five Reasons Parents Chose A Private School: 1. Climate, and classroom

---

<sup>29</sup> 2018 SCHOOLING IN AMERICA Public Opinion on K–12 Education, Parent and Teacher Experiences, Accountability, and School Choice, DiPerna, Shaw (2018)



management – Classroom discipline (50.9) 2. Better learning environment (50.9) 3. Smaller class sizes (48.9) 4. Improved student safety (46.8) 5. More individual attention to my child (39.3)

That result is consistent with study after study. A parent's child is their most precious asset, at Cato Academy, we share that belief. **The Cato Academy School Safety Plan include;** Emergency Plan – Approved By Governing Board An Emergency Organizational Plan (EOP) contains policies and procedures to follow before, during and after an emergency. The EOP integrates emergency preparedness activities into one document. It is the focal point for school planning and preparedness procedures. Security Technology - The Cato Academy campus will be built using a Gigabit Passive Optical Network (G-PON) fiber optics backbone. This system allows for the latest technology and highest speed potential available in schools today. GPON is a point-to-multipoint access network. Its main characteristic is the use of passive splitters in the fiber distribution network, enabling one single feeding fiber from the provider to serve multiple connection points on a campus. The scalability and customization of the security system prior to construction of the campus and more importantly, after the campus is operation is one of the main reasons GPON makes such a great platform for security. The door access controls, security systems (window break points, door contacts, panic buttons) are all managed through the GPON network. Any of these nodes can be expanded, moved or added to without minimal cost and effort. The Cato Academy campus will also have an IP based camera system with coverage on hallways, outside play areas and entry points. All of the cameras and security systems can be monitored remotely and or on a hand held device using an APP. The leadership team will be in constant monitoring of the system even if they are off campus. Building Security Measures - The Cato Academy campus will be designed and built with the latest security measures built into the construction. Perimeter doors and gates are locked with push bar exit options in case of a fire. The single entrance point, once the campus is secured will be the front office. The front office will have a double access door system where visitor are buzzed into a secure holding area then allowed to proceed onto campus. 95% of the visitors to the campus will never leave the secure holding area. Raptor System – The Cato Academy campus will open with the Raptor Security System is the gold standard for visitor tracking and clearance. Raptor has the most reliable and up-to-date U.S. sex offender database check available. Each and every visitor is instantly screened against the registered sex offender databases in all 50 states. The Raptor Visitor Management system generates reports for the school to show the details of who has been on campus and when. The governing board of Cato Academy will approve a visitor/volunteer policy which will be administered by the school Principal and Business Manager.

### **Promotion and Graduation Requirements**

The proposed grades served at the Cato Academy school will be K to 8<sup>th</sup>. Promotion to the next grade will require an average of 70% or greater in Math, ELA, Science and Social Studies. 5<sup>th</sup> and 8<sup>th</sup> grade students must pass the Texas SSI math and English assessments to advance to the next grade. Scholars that fall below on their final grade will have the option of making up the core subject class during the summer or to be retained and repeat the grade again. Prior to retention and failure, a detailed and robust system of interventions and oversight will have been implemented. Parents will be notified if their child does not pass one of these STAAR tests that are required for promotion. If a student has not passed the STAAR mathematics and/or reading test at 5<sup>th</sup> or 8<sup>th</sup> grade after the second testing opportunity, a grade placement committee (GPC) is formed. The GPC, which consists of the principal, teacher, and parent or guardian, will



create an instructional plan based on the individual needs of the student. Our mission is to provide a rigorous Classical Education to all students and mastery of core subjects is our goal. Summer school options will be made available for ELA and Math instruction as needed. Teachers will be offered summer stipends to provide summer options. Should parents wish to seek online options, prior approval from the school Principal will be required to accept the makeup credits.

We expect scholars to matriculate from grade to grade to remain at projected full capacity. Each year 78 Kinder seats will come enroll. Open enrollment and lottery wait lists will be managed to back fill any open grade level seats. We anticipate a 10% matriculation due to moving or life events per year. This target assumes up to 70 slots being filled in 1<sup>st</sup> to 8<sup>th</sup> grade each year. In the first 3 years of operation, the school will focus on understanding exactly where each scholar is on their academic journey and work to help them be successful in the rigorous Classical Education model. Over time, as scholars spend time in the Cato Academy academic program, the curriculum, intervention and instructional methods have a compounding effect and our mission will be aligned.

**Supports For Students At Risk Academically:** Targeted interventions are detailed in this application and include; assessments for identification on struggling student. Classroom time allotted for small group and differentiation as needed. With 135 minutes of ELA instruction per day and intentioned cross curricular ELA grading in history and science, Cato Academy scholars will be supported at many levels on mastering reading, vocabulary and oral and written communications. For Tier 3 pull out (for scholars performing below 20% of benchmark assessments) of indentified scholars an RTI committee will oversee all options to helping a particular scholar move towards mastery. In classroom, small group opportunities for differentiation are scheduled for 225 minutes per week out of a total of 675 minutes within just the ELA block. A focused effort proficiency in reading by 3<sup>rd</sup> grade will ensure the rest of the time a scholar is at Cato Academy and beyond, that they will have a love and passion for reading and sharing ideas.

For math interventions, our benchmark assessments paint a picture of the skill level of the entire class or an individual student. For all students testing data produced by benchmark tests, will be analyzed and broken down by strand by the classroom teacher using the 8 step data analysis metrics. The data analysis process includes a teacher grouping scholars by skills area, setting goals with all the class and communicating their strategy to the families. Resources from iStation, Study Island, Schoology LMS will be provided to the teachers who request additional math supports. These tools can be used in school or at home.

Beyond classroom interventions, a series of intervention programs will be employed to achieve maximum student growth; Study Hall or one on one tutoring with the teaching staff. Each teacher is required to host 2 hours per week of office hours for this purpose. Purposeful Pause in content delivery if entire portions of a class need assistance. Dedicating class time to differentiate in 'Crash Course' by strand instruction. Advanced scholar (gifted) strategy to challenge students who can advance beyond their grade level. Differentiated Instruction – and the training needed for all teachers to successfully implement differentiation techniques in their classroom. Progress monitoring with additional testing on standards that need additional support. Third party cloud-based subscription services such as iStation – Study Island Parent Volunteers and or tutor clubs.



The school is looking to bring in an after school vendor to manage and bill for after school services. The requirement for such vendor will include alignment with the mission and vision of Cato Academy. The after school program will be broken into three segments, each lasting 45 to 50 minutes. One of those segments must include homework and tutoring time for scholars that need additional supports. In addition to teacher office hours, the after school program will offer quiet time, small group and student lead study as well as paid tutoring services should the family elect to contract with the after school vendor. The Superintendent will reach out to area tutoring vendors, local Boys and Girls Clubs, YMCA or other organizations to bring their services into the campus.

**Goal 1 of Governing Board: Academic Excellence** – The Cato Academy Governing Board is committed to building an academic program that sets their students up for success in life. The academic goals and targets are listed in the below charts through year 1 and 2. The targets are realistic and take into account all the new scholars joining a new program. Each progressive year increases are expected as we have more time to focus on our students success. **Benchmarks Towards Goal:** By year four of operations, the STAAR ELA grades are in the top 25% for all school in the primary school boundaries area and the STAAR Math scores are in the top 30%. This is achieved through aggressive intervention and diagnosis of reading issues beginning in Kindergarten. The intervention program is detailed in this application and an integral part of achieving setting our students on a path for lifelong learning. Assisting young children with early speech interventions, dyslexia support, phonetic awareness interventions, ADHD strategies will pay off by year four in raising to the top academic school in the South Houston area. **Measurable To Monitor Goal:** Internal Benchmark Assessment – End of year STAAR ELA and MATH results – Close monitoring of at risk populations, dyslexia scholars, and other IEP and 504 students. **Timeline for Achieving Goal:** Beyond the two years stated in this documents, we anticipate a 10-15% STAAR increase year after year until we are in the top 25 to 30% for the South Houston market. **Tactics Toward Executing on Academic Goal:** Classical Education schools are heavy on language skills, reading comprehension and writing in all forms. With addressing some of the gaps which the management team has already experienced in prior schools, the ability to execute on day one lends to the predictions of state testing increase targets listed in this section.

With a concerted effort, to identify learning gaps, differentiate in the classroom and manage scholars into and out of an intervention program we anticipate STAAR score increases as targeted. These academic goals will be achieved by: **1.** The choice of research backed curriculum content, **2.** The hiring and teacher training process that Cato Academy is implementing, **3.** The focus on parental involvement and a culture of high expectations. **4.** The detailed programs surrounding differentiation and intervention explained in this section

For all students testing data produced by benchmark tests, will be analyzed and broken down by strand a series of intervention programs will be employed to achieve maximum student growth; Study Hall or one on one tutoring with the teaching staff; Purposeful Pause in content delivery if entire portions of a class need assistance; Dedicating class time to differentiate in 'Crash Course' by strand instruction; Advanced scholar strategy to challenge students who can advance beyond their grade level; Differentiated Instruction – and the training needed for all teachers to successfully implement differentiation techniques in their classroom; Progress monitoring with additional testing on standards that need additional support; Third party cloud-based subscription services such as iStation – Study Island; Parent Volunteers and or tutor clubs



## Family and Community Engagement

Enter narrative response to the prompts in this section of the application. *Reference Attachment 9 in the response.*

Parent – Family Communication Strategy - One of the key principles, which Cato Academy is founded up on, is that parental involvement is essential in maximizing the scholar's educational experience. Our mission speaks to it and partnering with parents is part of our Guiding Beliefs;

### **School's Mission:**

At Cato Classical Academy our mission is to prepare a diverse scholar population with an educational foundation for success in life. Academics are blended with the principles of virtuous living, traditional learning, and civic responsibility.

*We believe relationships are the key to our success. **We accomplish this by partnering with parents to provide a rigorous, time tested classical education.*** We strive to equip and train our teachers with academically excellent tools with the goal of instilling a lifelong love of learning in our scholars.

In operation, partnering with parents take on a number of different aspects. Below are specifics of what we expect from our Administration, Teachers, and Parents as part of the Cato Academy school. Communication includes monthly grade level and campus wide newsletters, individual teacher use of the Remind App (a school based Twitter program), open houses, grandparent days, fall festival and more. Volunteer Opportunities on Campus Lunch monitor or support, Service on PTO Board, Sub-Committee Service at Governing Board Request, Before and After Care support, Tutoring, Coach – assistant coach.

School Advisory Committee (SAC) - Cato Classical Academy intends to have an active and engage Parent Teacher Organization and School Advisory Council. The Governing Board will establish a School Advisory Council beginning in year two. The School Advisory Council (SAC) will include members from the school community including no less than one (1) member from; the parent community, the teaching staff, administration, student leadership, community members at large. The School Advisory Council will advise the Governing Board on policies relating to academics and extracurricular activities at the school. The SAC will be asked to advise the Governing Board on budgetary priorities, community relations, and other issues identified by the Governing Board. The SAC will be tasked with performing an annual stakeholder survey of the school community using the Net Promoter Score<sup>30</sup> format. The results will be reported at the last Governing board meeting of the school year. The role of the SAC is advisory. Phone Calls Home is a required task by all teachers to all students. These calls will occur within the first two weeks of the start of school. The purpose of the call is to make contact, identify something positive about the scholar and avoid any negative feedback. The first call/impression should always be honoring the parents choice, asking for support at home and

---

<sup>30</sup> 2017 Satmetrix Systems, Inc. [All rights reserved.](#) Net Promoter, Net Promoter Score, and NPS are trademarks of Satmetrix Systems, Inc., Bain & Company, Inc., and Fred Reichheld.



covering something uniquely special about their child. Remind App – Cato Academy requires all teachers to set up a Remind App class code for their class. The app functions as a private Twitter group that allows the teacher to share homework assignments, photos of the whiteboard activities of the day or tidbits about the class. Newsletters – Grade Level and Campus-Wide – are suggested to go out bi-weekly but are required to go out monthly. Meet the parents at the curb – One of the norms of teaching at a Cato Academy requires that teachers meet their families at their cars at the end of the day. The brief moment in the pickup lines allows for a personal touch and a chance to give a word of encouragement or corrective action to the parent/guardian.

Principal and Vice Principal staff are required to be at the drop-off and pick up line as well. A highly visible Principal is a part of the Cato Academy mission. House System - An important channel which the parents engage in the school will be through the House System. As part of the Cato Classical Academy model, the school will implement a house system which creates 4 separate houses that students are enrolled into based on the grade bands that they are studying. 1<sup>st</sup> and 5<sup>th</sup>, 2<sup>nd</sup> and 6<sup>th</sup>, 3<sup>rd</sup> and 7<sup>th</sup>, 4<sup>th</sup> and 8<sup>th</sup> will each be enrolled in of four houses.

*What is the House System?* As a classical school featuring a curriculum based on the traditions of Western culture, House System is inspired by the ideals of republican participation, shared leadership, and civil service. *How does it work?* Every scholar belongs to a House. When you move to the next grade level, you remain in the same House. There will be friendly competition throughout the year. *What Houses Are Scholars Enrolled In?* For the enrolling school year, each grade will be enrolled in a corresponding grade-levels for each House: *House 1:* Kindergarten, 4th Grade, and 8th Grade *House 2:* 1st and 5th Grade *House 3:* 2nd and 6th Grade *House 4:* 3rd and 7th Grade *House System as a School Government.* That is the vision we are growing it into - it will build each year. Leadership through the Scholar Senate. Every Homeroom will have an election within the first month of each semester to elect 2 Scholar Senators. Scholar Senators will provide leadership at a homeroom level, a grade-level, and a House Level. At the House Level, they will meet monthly with House Captains (parent volunteers) to help plan a service project and an assembly for their whole House. *The Role of the House Captain.* House Captains are the backbone that makes the House System work they communicate to their House members, and take leadership roles on campus. In addition to the house system, the campus will have an active and engaged Parent Teacher Organization which works within the house system framework to host the following annual events: Fall Festival, Sweetheart Dance, Grandparents Day, Math & Science Night. Campus/Community Service Projects will be one of the charges of the house captains and parent volunteers. Some of the projects may include: Donation drives (like books) and fundraisers sponsored by the PTO for the Cato Academy Teachers' Fund; Campus Beautification: each House will adopt the school campus for 1 month each semester, to help pull weeds, pick up trash where needed, donate minor landscaping projects, etc.; Whole school: July, before we begin each new school year the house captains will be charged with an area of campus to decorate, paint or prepare for the new school year. Community service projects are an encouraged part of a houses charge. Suggestions would include visiting skilled care elderly homes for reading and captivities, volunteering to the local city for beautification or other ways to plug our scholars into the local community.

Connecting with Families: The success of our school will be directly related to the power of relationships. Under the Culture section, we detail the foundational philosophies from Adlerian psychologists, Dr.Druiker and Dr. Glasser. Keeping with the idea of relations building all our events and interactions with parents will focus on getting to know their family's stories,



dreams, and struggles. Once enrolled and opened, we will meet children at the door each morning and meet the parents at their care each afternoon during pick up. Meet the teacher nights will occur very early in the year and a phone call home will happen by the teacher within the first month. All these efforts are fitting with our mission and are aimed at building solid relationships with families.

Beginning in September of 2020 through to school opening the objective of the Superintendent, Governing Board, and early hired staff will be to implement a program to engage the community in the new school. Our strategic plan for enrollment includes an aggressive budget of \$70,000 for traditional marketing and advertising in English and Spanish. The effectiveness of this effort will be a series of 'call to action' events and open houses held at local community spaces to present the school model, answer questions and begin the enrollment process. The Superintendent has launched schools in four markets in the past and uniquely understands the process of gaining traction, telling the school stories and finding early adopters to help the outreach efforts. During the year-long enrollment and marketing period, all efforts will be tailored towards; 1. Listening to the community and address any unforeseen needs. 2. Engaging the families, businesses and civic organizations/churches in spreading the word of the school. Special focus will be placed on area preschools. All of which have been visited and the idea of Cato Academy has been introduced during the planning and charter drafting period.

From prior experience, the initial focus will be on finding and building relationships with early adaptor parents that can help organize and extend the reach of the school leadership team. This early parent team will become the beginning PTA and have proven invaluable with organizing volunteers and understanding the pulse of the local parent community.

It is part of the Mission of the Cato Academy school to partner with the parents in their child's education. We believe that is the mutual responsibility of families, schools and communities achieve our Whole School goals. The foundations of our Adlerian philosophies are built on strong relationships. Family engagement is fully integrated in the child's education experience, supports the whole child and is both culturally-responsive and linguistically appropriate.

The following efforts will be implemented to engage and include parents in the decision making and educational process at our school: School Advisory Committee (made up of parents, teachers administrators and detailed in this application as to their role and scope). Parent Teacher Organizations, Volunteer opportunities through the Cato House System. Kinder Boot Camp, Donuts with Dads and Muffins With Mom's Events. Support in organizing car pool teams. Fall Festival, Christmas Recitals, Science Night, Grandparents Day all of which will be implemented into the calendar by year two. Parent satisfaction surveys will be conducted in English and Spanish annually with the results being presented to the Governing Board.

The founding team has identified a number of community groups that have expressed an interest in partnering with the school. The Superintendent and Principal will have performance metrics built into their evaluation on the community outreach efforts done on behalf of the school. The goal of these outreach efforts is to leverage community resources; take advantage of tools and programs in the surrounding community, expose the scholars to leaders in the community, build and maintain relationships with the business, faith based, social service and non-profit organizations in the community.

The Pearland Alvin Rotary has expressed interest in supporting our efforts as their focus as a civic club is to engage in local K12 education. The City of Pearland Parks and Recreation



has offered to host our science classes either at their Delores Fenwick Nature Center or through bringing their resources to our campus.

## Leadership and Governance

### Board Structure and Qualifications

Enter narrative response to the prompts in this section of the application. *Reference Attachments 10-14 in the response.*

| Proposed board member | Area of expertise   | Brief description of experience in this area  |
|-----------------------|---|---|
| Dr. Nicholas Ellen    | Teacher – Non Profit Board Service - Counselor                          | Dr. Ellen is a professor, author and has been in the education arena all his adult life.  |
| Renee McGuire         | Business Community – Real Estate – Non-Profit formation and management. | Mrs. McGuire will be instrumental in ensuring the campus is built on time and on budget. Her local connections to the Pearland area are critical. |
| Jignesh Derasari      | Executive level leadership – International business - Finance           | Mr. Derasari will manage the financial systems and oversight on the new school.   |
| Jill Schockley        | Special Education – Speech and Language – Teacher                       | Mrs. Schockley has years of experience in Texas public schools and special populations.   |
|                       |   |   |

The Corporate Board of Directors of Classical Charter Schools of Texas, Inc. will also serve as the Governing Board of Directors of the Cato Classical Academy school. The Board of Directors will be directly and actively involved in the start-up year as well as the operational years to come. The Governing Board will establish a **School Advisory Council** (SAC) beginning in year two. The School Advisory Council will include members from the school community including no less than one (1) member from; the parent community, the teaching staff, administration, student leadership, community members at large. The School Advisory Council will advise the Governing Board on policies relating to academics and extracurricular activities at the school. The SAC will be asked to advise the Governing Board on budgetary priorities, community relations, and other issues identified by the Governing Board. The SAC will be tasked with performing an annual stake holder survey of the school community and present the results at the last Governing board meeting of the school year. The role of the SAC is advisory. The Governing Board of Directors that has been assembled has the business background, non-profit leadership experience and business acumen to ensure a successful school launch. The



Board of Directors may expand the board to add community members and may create advisory committees as needed and on an ongoing basis.

The mission, vision and core values of the Cato Academy will be the guiding focus of the Board in its governance role. The Board shall have all the powers and duties required and/or permitted by applicable Texas law.

Cato Academy is committed to quality in all aspects of its operations and will use all resources and guidance from established, high-quality sources including the Texas Charter Schools Association and National Charter School Resource Center which informs decision making and best practices around the following: Financial oversight; Academic oversight; Regulatory oversight; School goals and accountability; Leader support and evaluation; Composition and structure; Open meetings

Cato Academy shall directly hire a Superintendent the oversight of the school. It will be the Superintendent's responsibility to hire, support and hold accountable the Principal and the leadership team. The governing board will establish board policies that clearly define the direction and goals of the school. The board shall annually approve both the preliminary and final school budgets for submission to the Texas Education Association as well as the calendar and its accompanying instructional minutes. As required by Texas Education Code (TEC) 12.119(b) the board chair will submit about charter school board members and school officers each year. All open-enrollment charter holders must submit governance reporting forms by December 1 of each year. Governance reporting forms are submitted electronically through the Charter School Tracking System (CSTS) in TEAL. These forms are usually made available in September. One form must be completed for each board member and charter school officer. The charter school superintendent must approve all forms in order to complete the submission process. Such approvals shall be in conformance with state law and department guidelines. Resolutions required for financial operations and commitments, legal proceedings, and other necessary corporate activities shall be processed after submittal by staff and review and approval of a majority of the board.

In addition to the broad responsibilities outlined in the bylaws and noted above, the key roles and responsibilities of the board include: Promote the vision and mission statements; Strategically plan for the future of the school; Adopt appropriate policies; Monitor the effectiveness of the academic, operational, financial plans; Provide financial oversight; Secure adequate resources; Hire, support and evaluate the Superintendent; Network in the community; Serve on and Delegate committees

*Governing Board General Practices* **Academic Oversight:** As part of the academic oversight role of the Governing Board, the members will understand the academic goals put forth in the Charter Contract and draft a board policy statement on what academic success looks like at Cato Academy. The Superintendent will provide a training to the Governing Board on the academic accountability framework used by the State of Texas Education Agency. At least quarterly, the Superintendent will compile an academic progress report, including benchmark data, to the Governing Board with any bench mark data that may per pertinent. Establishment of a Board Academic Committee: The Governing Academic Committee shall consist of at least one Director, the Superintendent and School Principal/Administrator. The Academic Committee shall meet at least four (4) times per school year. The purpose of the Board Academic Committee shall be to review school data, ensure academic expectations and goals are being met, and provide insight into instructional activities that meet the specific needs of the students. As



detailed under the school's academic performance plan, the school based Academic Accountability Committee (AAC) will review benchmark data, teacher observations, end of year STAAR testing and prepare a report for the Board Academic Committee. This report will provide insight into curriculum effectiveness, professional development plans and additional resources needed to address academic targets. Each year, the Governing Board will, review a report from the Board Academic Committee end of year State of Texas, STAAR, assessment results and establish academic goals. These goals will review past academic data, analyze the schools data against their peers, the State of Texas average test results and incorporate any new policy or laws enacted by the State of Texas. These goals will be monitored and become a part of the Superintendent's annual performance review.

**Financial Oversight:** The Governing Board understands the short and long-term economics of the school and has systems in place to monitor short and long-term financial health. As part of the Governing Boards financial oversight role, the Superintendent will provide an orientation to all new board members on the fiduciary role of a non-profit Governing Board in Texas. The Governing Board will monitor break even enrollment numbers, preliminary and annual budgets as presented by the Superintendent. As part of long range planning for the school the Governing Board will monitor a 5 year projected budget and analyze future needs that may significantly affect the budget.

Establishment of Finance Committee: The Finance Committee shall consist of at least two Directors, one of whom shall be the Board's Treasurer, and the Superintendent and School Principal. The Financial Committee shall meet at least two (2) times per school year. The purpose of the Financial Committee shall be to prepare annual budgets for full Board review and approval, coordinate the Annual Audit, and develop long-term financial goals and plans for full Board consideration. Financial reporting will be reviewed monthly with analysis of the Profit and Loss, Balance Sheet and analysis of Budgeted vs. Actual. The Governing Board, will establish financial policies and procedures and compile a manual as guidance to the Superintendent and school operations. As part of the development of the policies and procedure policy, the following framework will be part of the finished manual: **1.** Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts. **2.** All documentation related to financial matters will be completed by computer, word processor, typewriter, or ink. **3.** The Governance Council can appoint someone else to perform the Superintendent's responsibilities in the case of absence. **4.** Establishment of a Purchasing Policy - The Superintendent's may authorize expenditures and may sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000. **5.** Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, asset management are all policies that will be established by the Governing Board and executed by the Superintendent's. **6.** Petty Cash and Credit Card Use Policy will be established using framework that is generally acceptable to Charter School cash handling procedures. **7.** Contracts. Consideration will be made of in-house capabilities to accomplish services before contracting for them. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the



school. ) Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Superintendent's will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Superintendent's will be responsible for ensuring the terms of the contracts are fulfilled.

Potential conflicts of interest will be disclosed upfront, and the Superintendent's and/or Member(s) of the Governance Council with the conflict will excuse themselves from discussions and from voting on the contract.<sup>31</sup>

The Governing Board will commission an annual financial audit by an independent third party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to TEA. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to: a. An audit of the accuracy of the financial statements b. An audit of the attendance accounting and revenue accuracy practices c. An audit of the internal control practices.

Establishment of Governance Committee: The Governance Committee shall consist of at least two Directors, and the Superintendent. The Governance Committee shall meet at least two (2) times per school year. The purpose of the Governance Committee will be to plan and develop Director orientation and training, identify and qualify new Governing Board members based on the approved recruitment policy and ensure Board operations and policies are updated and compliant with State law.

*Board Officer Descriptions; Board Chair-* The Board Chair will call and preside over all the meetings of the Governing Board. The Chairperson shall be entrusted with the power to sign all certificates, consents, contracts, or other instruments of the School which are approved by the Board. The Chairperson shall exercise and perform such other powers and duties as may be prescribed by the Board from time to time. Dr. Nick Ellen was voted as Board Chair of the Board of Directors, as reflected in the organizational minutes of action. **Board Vice Chair-** In the absence of the Chairperson or in the event of the Chairperson's disability, inability, or refusal to act, the Vice-Chair shall perform all of the duties of the Chairperson and in so acting, shall have all of the powers of the Chairperson. The Vice-Chair shall have such other powers and perform such other duties as may be prescribed from time to time by the Board or by the Chairperson. Renee McGuire was voted as Board Vice Chair of the corporation, as reflected in the organizational minutes of action. **Board Secretary and Treasurer-** The Secretary shall keep or cause to be kept a book of minutes at the principal office or at such other place as the Board may order all meetings of the Board with the time and place of holding, whether regular or special and if special, how authorized, the notice thereof given, the name or names of those present at the Board meetings and the proceedings thereof. The Secretary shall give or cause to be given notice of all the meetings of the Board required by these Bylaws or by law to be given and perform such other duties as may be prescribed by the Board from time to time. The Secretary

---

<sup>31</sup> National Charter School Resource Center  
Generation 25: <<Cato Classical Academy>>



shall exercise and perform such other powers and duties as may be prescribed by the Board from time to time. Jignesh Derasari was voted as Board Secretary and Treasurer of the corporation, as reflected in the organizational minutes of action.

**Superintendent-** The Superintendent is an elected officer of the corporation and is directly responsible for implementing all policies and procedures approved by the Board. The Superintendent is not a voting member, or corporate member of the Governing Board. The Superintendent has the power to contractually bind the Cato Academy according to the by-laws and stated board policies regarding contracting. The Superintendent is the primary point of contact regarding Cato Academy's charter application. Joe Higgins was voted as Superintendent of the Corporation, as reflected in the organizational minutes of action. Mr. Higgins has agreed to forgo compensation for his role as Superintendent. The Superintendent will complete an initial 30 hour CEO training to include; School Law (240 min), School Finance (240 min), Health and Safety (120 min), Accountability of Public Funds (240 min), Accountability to the Public (240 min), Open Meeting Laws (60 min) and Public Records (120 min). Each year the Governing Board will commit to an additional 15 hours of training.

Board Member and Officer Training – in accordance with Texas Education Code (TEC 12.123) and Texas Administrative Code (TAC 100.1102 – 1105) the following training protocols will be conducted by all Cato Academy governing board members, chief executive officer (Superintendent), campus administrative personnel (business manager); WHEN: The board and administration training will occur within one year of the signing of the charter contract. New officials at existing charters must also complete the required training within one calendar year of taking office. After the initial training has been completed, continuing training is required annually thereafter, with the deadline being the anniversary date of the officials' start dates. Course Requirements: Members of the governing body will receive 12 hours of initial training on management, operation, and accountability of the charter school, which includes appropriately managing public funds (TEC §12.102(3), TEC §12.122, and TAC §100.1101(d). This training will occur within one year of appointment to the Governing Board. The course will include training modules on School Law (150 min), School Finance (60 min), Health and Safety (30 min), Accountability of Public Funds (120 min), Accountability to the Public (60 min), Open Meeting Laws (60 min) and Public Records (60 min). Each year the Governing Board will commit to an additional 6 hours of training.

### **Proposed Superintendent Qualifications**

Enter narrative response to the prompts in this section of the application. *Reference Attachments 15-16 in the response.*

The Governing Board of Cato Academy has identified and contracted with a candidate for Superintendent is Mr. Joe Higgins. Mr. Higgins was one of the founders and served for five years as CEO of Leman Academy of Excellence. Leman Academy was the fastest growing charter network in Arizona history when he left. All the ranked schools in the network were ranked as A or B under the Arizona and Colorado grading system. In January 2018, Joe left the position of CEO after opening 6 campuses in Arizona and Colorado with a staff of 425 and 4500 students enrolled. Under his leadership, the network doubled in enrollment every year, the teacher retention rate was 90% and he developed over \$80m in real estate.

As Superintendent of Leman Academy Mr. Higgins systematized the processes needed to successfully manage the major elements of opening and operating a Classical Education charter



school including; Curriculum planning and resources (using the Schoology LMS), Character Education and Social Emotional educational integration, Teacher/Admin training, New School Launch Support (financing, board governance training, construction), School Operations (HR, Special Ed, Lunch Program, Front Office etc.). Mr. Higgins will have his Masters in Education Leadership (MEd) by June of 2020.

Over the past 20 years Joe has founded and grown over a dozen businesses in multiple fields. He has served for 13 years on the Governing Board of Salpointe High School a 70 year old, private college prep school as well as 2 years as a Governing Board member with Pima Prevention Partnerships, a 3 campus, at risk recovery charter high school with locations in Tucson and Phoenix. He is on the advisory boards of two private high special needs schools, Rockwood Prep and St. Dominic de Salvo. He was Board Chair of Southwest University of the Visual Arts, an HLC accredited arts college, and he navigated the 30 year school from profit to non-profit status. In the non-profit governance arena, he serves on the board of trustees with Roman 12 Ministries. He was the prior chair of Arizona Small Business Association, Arizona's largest trade group.

Mr. Higgins has been hired by and financially compensated from the Forgotten Angels Foundation of Pearland, to support the Cato Governing Boards efforts in establishing a charter school in the Pearland area. He is moving to the Pearland area and is committed to the startup and ongoing success of the school. His unique background and success with Classical schools will help ensure short and long term success of the school.

The Governing Board includes Jignesh Derasari a CEO/COO with extensive operational background in varied industries. Mr. Higgins and Mr. Derasari will ensure financial, academic, operational and cultural systems are built and in place to run the school operation and ensure that a succession plan are in place for the future. Both leaders' backgrounds and oversight will ensure the operations are adequately functioning and perpetual.

### **Proposed Instructional Leadership Team**

Enter narrative response to the prompts in this section of the application. *Reference Attachments 17-19 in the response.*

**PRINCIPAL** The **Principal**, as the site manager and academic leader, is responsible for the proper execution of their job description. The ideal principal will be an individual with long standing in both the local community and the community of educators with multiple prior years of experience as a principal of a large high school in a local district. He/She has experience as the leader, trainer, and evaluator of educators and will establish the Cato Academy culture through standards, guidelines, trainings, directives, and example. As the "instructional leader", classroom instruction will be a direct responsibility and daily concern. This position will be filled with an experienced individual. Teachers professional growth will be the responsibility of the Principal. The Principal will be responsible, and work closely with His/Her administration team to determine teacher professional capabilities and appropriately and direct their professional development plan. Though professional development will be delivered through a variety of sources (principal, outside vendors, teachers, etc) it will be the Principals role to ensure each of the schools teachers are growing professionally. **General Job Description:** The Academic Leader of Cato Academy, called Principal, shall assume responsibility for the general leadership and administration of the K8 school consistent with School Board approved mission,



philosophy, guiding principles, policies, and annual budgetary commitments/constraints. **Line of Authority/Reports to:** Principal shall be directly accountable to the Superintendent.

**Works with:** Superintendent and directly Supervises; Assistant Principal, Business Manager, Athletic Director, PD/Data staff, Special Education Director, Faculty, Support Staff, Health Service Coordinator, Families and Scholars of Cato Academy. These positions will be added over time as enrollment increase. Our budgets and staffing plan reflects target dates when administration positions will be added. **Principal Minimum qualifications:** A master's degree in education administration or education leadership as well as state-specific teacher certification and/or principal certification. The ideal candidate would have at least of five years teaching/administrating experience, or equivalent, in the past 10 years. In addition to education and certification requirements, Principal positions will require strong references and recommendations from previous employers and instructors, along with strong character references. **Areas of Responsibility: To include, but not limited to:** Provide leadership, guidance and encouragement to faculty and staff; Provide written evaluations on all teaching and instructional personnel with the school; Orient and assist new hires; Conduct faculty and staff meetings using planned and written agendas; Conduct regular In-service training for teachers ; Provide direction, coordination and supervision to ensure the academic staff develop and align the curriculum maps, with their sequence of essential learning outcomes, assessments, resources, purchased instructional materials, to TEKS standards.; Provide leadership including direction and supervision with the articulation and annual revision of the curriculum document and the selection and use of instructional materials and equipment; Provide direction, coordination and supervision to collect, organize and analyze data related to the school educational program in order to assess student learning and development; Promote and provide direction to the academic staff toward the development of specific and measurable goals for scholar achievement; Provide direction, coordination and supervision to ensure curriculum mapping/scope and sequence documents that connect to the essential learning outcomes through instructional planning for each subject area at each grade level is implemented; Provide instructional leadership for outcomes, providing faculty and staff leadership and collaboration with curriculum, instruction and assessments; Provide instructional leadership by providing formal and informal evaluations of the teaching faculty; Develop and implement teacher observation tools; Oversee and direct the mentoring of new teachers; Ensure all necessary supplies, textbooks, and resources are ordered; Ensure a safe and orderly environment; Plan and conduct faculty and staff meetings; Develop and implement school calendar; Ensure proper supervision of scholar activities and events; Coordinate special events such as award ceremonies, graduation ceremony; Provide leadership, guidance and encouragement to parents and scholars; Work with the Registrar to prepare and plan enrollment, re-enrollment process; Facilitate the clarification and resolution of conflicts between parents and teachers; Cooperate and work with the community in the use of school facilities; Develop positive relationships and make appropriate use of parent volunteers; Promote the proper conduct, behavior and discipline conducive to having an excellent learning environment; Assist new scholars with orientation to school; Discipline scholars as necessary in the form of being fair and consistent; Provide scholars an excellent, positive, encouraging role model; Provides oversight of mandated State testing. Training Requirements for the Principal and Vice Principal (TAC §100.1001(19)); He/She will receive 10 hours of initial training on management, operation, and accountability of the charter school, which includes appropriately managing public funds. This training will occur within one year of or hiring as Campus



Administrative Staff. The course will include training modules on School Law (90 min), School Finance (60 min), Health and Safety (90 min), Accountability of Public Funds (30 min), Accountability to the Public (120 min), Open Meeting Laws (30 min) and Public Records (60 min). Each year the Governing Board will commit to an additional 5 hours of training.

**ASSISTANT PRINCIPAL** (*scheduled to hire in year two, based on enrollment projections*) **General Job Description:** The Assistant Principal serves as a member of the Administrative Team of Cato Academy to help develop and implement the total school program, assisting the Principal and the CEO with the general leadership and administration of Cato Academy consistent with Board approved mission, philosophy, guiding principles, policies, and annual budgetary commitments/constraints. **Line of Authority/Reports to:** Assistant Principal shall be directly responsible to the Principal of Cato Academy. **Works with:** Principal, Business Manager, Special Education team, Faculty, Support Staff, Families and Scholars of Cato Academy. **Minimum qualifications:** A master's degree in education administration or education leadership as well as state-specific teacher certification and/or principal certification, along with at least of five years teaching/administrating experience, or equivalent, in the past 10 years. In addition to education and certification requirements, Principal positions will require strong references and recommendations from previous employers and instructors, along with no criminal history and strong character references. **Areas of Responsibility: To include, but not limited to:** Implement Board created policies; Assists with supervision of personnel; Provide leadership, guidance and encouragement to faculty and staff; Supervise those personnel assigned by the Principal; Provide written evaluations on personnel as assigned by the Principal; Assist with orientation of new hires; Assist in creating job descriptions and evaluation instruments; Conduct meetings using planned and written agendas; Create and assign duties and schedules for faculty and staff; Ensure curriculum mapping/scope and sequence documents that connect to the essential learning outcomes through instructional planning for each subject area at each grade level is implemented; Assist with development of school curriculum as needed; Assists with providing instructional leadership for outcomes, providing faculty and staff leadership and collaboration with curriculum, instruction and assessments; Assist with formal and informal evaluations of the teaching faculty; Assist with the mentoring of new teachers; Assist with developing a comprehensive and well planned professional development program to increase school academic output; Provide input toward preparation of annual budget; Develop and implement class and teacher schedules; Develop and monitor duty schedules; Generate report cards and progress reports; Conduct faculty and staff meetings when delegated by Principal; Approve Field Trips; Assist with proper supervision of scholar activities and events; Help facilitate the clarification and resolution of conflicts between parents and teachers; Encourage the use of community resources; Initiate and evaluate parent surveys and exit surveys; Assist as needed with presenting the school vision and program to the community; Work with administrative team to plan and hold functions; Assist with preparation of scholar activities and events within the school; Assist new scholars with orientation to school; Discipline scholars as necessary in the form of being fair and consistent; Provide scholars an excellent, positive, encouraging role model; Assists Principal with oversight of State mandated testing

**Director of Instruction (PD/Data/Curriculum Director) – Projected to hire in year one and support the Principal in teacher training and curriculum implementation.** Areas of Responsibility and minimum qualifications to include, but not limited to: A Master's in Educational Leadership or equivalent; At least two years of successful teaching experience;



Proven leadership ability promoting collaborative decision making; Strong verbal, written, and interpersonal communication skills to positively impact community, parents, scholars, administrators, faculty, and staff; Strong commitment to supporting and safeguarding the principles of excellence in education; Working knowledge of learning theory, instructional methodology, curriculum development, teacher observation/evaluation; Ability to manage conflict resolution with an attitude of humility and service; Working knowledge and understanding of Texas TEKS academic standards.; Working knowledge and understanding of computers and computer software applications such as word processing, spreadsheets and other applications tailored to specific departmental needs; Working knowledge of learning management systems. ; Assist Principal with oversight of State mandated testing.

### **Proposed Financial and Operations Leadership Teams**

Enter narrative response to the prompts in this section of the application. *Reference Attachments 20-21 in the response.*

The identified Superintendent, Mr. Joe Higgins, will lead all aspects of financial planning, budget development, financial management, internal controls, and HR protocols. He brings to the operation extensive background in implementing financial planning and oversight in the public charter school arena.

The Superintendent reports directly to the Cato Academy Governing Board. Board member Jignesh Derasari will serve as the Board designee on the finance and oversight subcommittee. Monthly reports will be provided to the Governing Board with current Profit and Loss statements and Balance Sheets as well as aging reports and budget versus actual. A customized dashboard will be developed that helps all the Governing Board members to interpret the financial health of the school. A quarterly report will be given to the Governing Board on the current and future financial situation of the school. A once annual Financial Audit will be conducted with an independent firm with a background in public charter school accounting. Mr. Derasari will oversee and present to the board contracts with outside vendors related to financial services. These contracts will include: a payroll processing company (preferably PPO), an accounting firm that will reconcile the monthly books and work closely with school staff on accounting processes, and an annual audit firm who will prepare the non-profit audit.

***BUSINESS OFFICE MANAGER/HR - General Job Description:*** The Business Office Manager serves as a member of the Administrative Team of Cato Academy to provide leadership related to all financial responsibilities. The Business Manager is entrusted with the financial records and operation of the front office. This includes the maintenance of confidential school records of scholars, personnel and finances in a manner consistent with administrative, ethical, legal and regulatory requirements of the educational system and the Texas Education Association. Responsibilities include payroll, accounts receivable and accounts payable functions of the Business Office. ***Line of Authority/Reports to:*** The Business Manager shall be directly responsible to the Superintendent to make sure that the school's budget and resources are used in the most efficient way. ***Works with:*** Superintendent, Principal, Assistant Principal, Special Education Director, Faculty, Support Staff, Health Service Coordinator, and Families of Cato Academy. ***Areas of Responsibility: To include, but not limited to:*** Keeping accounts and reporting on the school's financial position; Prepare financial information and reports; Work closely with the Principal preparing teacher contracts; Develop the annual budget in conjunction with the administration; Ensure adequate liability insurance; Contribute ideas and implement



employee benefits – medical, dental, retirement, disability; Provide direction with budget preparation; Develop the annual budget; Oversee and manage revenue and expenditure targets; Monitor the annual operational budget; Monitor the school operations on a monthly basis; Prepare and provide a monthly financial statement to the Head of Schools; Responsible for payroll plans; Oversee and manage collection of tuition, fees, donations, etc.; Oversee and manage the school's financial records; Responsible for reviewing and approving all payables; Responsible for directing the cash management function; Sign payroll checks & payable checks; Prepare and provide appropriate reports of the school's financial condition for use by the; Principal, Cato Governing Board, State and Federal Governments and third-party auditors in support of compliance requirements; Responsible for the maintenance of accurate office records, including personnel files, with full confidentiality as appropriate and required by law; Oversee the maintenance and management of accurate scholar records; Prepare and provide faculty and staff contracts as instructed by the Principal; Support and assists administrative efforts in attracting, developing and retaining high quality faculty and staff; Develop and maintain procedures for managing and monitoring the school system's financial resources; Provide direction, coordination and supervision of the Front Office; Oversee the Student Accountability Information Systems (SAIS); Coordinate and manage Grants Management for the school; Assists with ordering all necessary supplies, textbooks, and resources; Assists with the competitive bid process and negotiation of vendor contracts; Make timely payments to suppliers and contractors; Facilitate the distribution of information needed for an orderly operation; Provide scholars an excellent, positive, encouraging role model

**Minimum Requirements** – The business manager should have a minimum of 5 years of office experience in a professional setting. Background in school administration is a plus, as is a college education. Proficiency PEIMS, e-IEP-Pro (special education system), a Learning Management System such as Schoology or Canva as well as other software systems which would be found in a school is a minimal requirement. All staff, including the office manager must pass background checks and finger print clearance. The Business Manager will complete an initial 30 hour CEO training to include; School Law (240 min), School Finance (480 min), Health and Safety (20 min), Accountability of Public Funds (240 min), Accountability to the Public (160 min), Open Meeting Laws (20 min) and Public Records (40 min). Each year the Governing Board will commit to an additional 15 hours of training.

**REGISTRAR JOB DESCRIPTION - PEIMS Coordinator Line of Authority/Reports to:** The Registrar shall be directly responsible to the Business Manager of Cato Academy., working closely with both the Principal and Business Manager to make sure that the school's planning and implementation of new scholar registration is handled with great care and professionalism, in order to assure that the enrollment process for all families is handled efficiently. **Works with:** Superintendent, Principal, Assistant Principal, Business Manager, Faculty, Support Staff, Nurse, and Families and scholars of Cato Academy. **Job Goal:** To perform such actions as required to establish a true, accurate and permanent record of each scholar who attends Cato Academy, as well as providing the necessary clerical responsibilities required for the administration of the school in order to assure the smooth, efficient operation of the K8 school office. **General Job Description:** The Registrar will be responsible for all scholar registration, enrollments and withdrawals entering and maintaining scholar data in school database system. Administer, navigate, implement and update scholar and school data demographics in school database system. Responsible for PEIMS coordination of collecting,



processing, and transmitting student, staff, and financial data through the Public Education Information Management System (PEIMS), training of campus staff PEIMS data contacts, and to provide support in other district data collection and reporting activities. This involves partnering with parents, handing out and explaining paperwork, contacting the home when necessary, inputting all information into the school database system as well as contacting other schools for information when necessary. **Minimum Requirements** – The registrar should have a minimum of five years of office experience in a professional setting. Background in school administration in particular registrar is a plus, as is a college education. Proficiency in software systems which would be found in a school is a minimal requirement. All staff, including the office manager must pass background checks and finger print clearance. Bachelor's degree or equivalent work experience; • Minimum of (5) years' experience working with PEIMS; • In-depth knowledge of TEA Data Standards, TEA Attendance Accounting Handbook, PID maintenance and ET submission; • Ability to collect, organize, and maintain accurate and auditable records; Excellent time management skills enabling complete regulatory compliance.

Contracted Services Auditor Fees- Based current market conditions, we assume audit and fee expense at \$10,000 and increasing 3% in years two and three. Information Technology- Based on our enrollment projections, we assume information technology services, equipment and training will be \$30,000 in year one, and increase at 3% in year two and three respectively. Marketing and Advertising- Based on previous history, we anticipate ongoing marketing and advertising to \$18,915 in year one, and increase with enrollment to a level of \$26,918. Contracted Services- Contract services include all human resource functions, general administration and business operations, and all compliance related functions. Based on our enrollment projections we assume a contracted service expense of \$145,360 in year one, \$179,230 in year two and \$257,338 in year three. Landscape contract- Based on a campus site of approximately 6 acres, we assume a yearly landscape contract of \$12,000 (\$1,000 per month), increasing 3% in year two and three respectively (this is under the Janitorial line item, custodians are on staff). Transportation- Based on a projected transportation need to commute students to and from extracurricular and other school related activities, with fleet size to fluctuate by need, we assume our vehicle expense will not exceed \$7650 in year one, with increases with enrollment to 1 \$17,337.

The applicant team brings to this project a wealth of experience and backgrounds. Their community connections and long time history in the S. Houston, Alvin and Pearland area will be critical in the schools success. The areas that each member of the team brings include: Dr. Ellen: Professor, Counselor, Speaker, Author and Business Administration experience with a lifetime in higher education. Renee McGuire, has worked in development, construction and non-profit leadership with the special needs community for over 30 years. Jignes Derasari has executive level organizational and management experience in multi-national corporations. His experience with finance, HR, operations will be a great asset to the team. Jill Shockley brings to the board public teacher experience from years at the Ailef district as well as Special Education and non-profit services for the special needs community. The Superintendent, Joe Higgins has opened and successfully ran 6 Classical Charter schools in Arizona and Colorado. As CEO of that group he started on the ground floor and built a network of A and B schools with over 4500 scholars in Prek to 8<sup>th</sup> grade. He over saw all aspect of operations, hiring of the administration, development



of policies and systems, creation of accountability systems, management of all construction and development.

### **\Performance Management**

Enter narrative response to the prompts in this section of the application. *Reference Attachments 15-16 in the response.*

The Cato Academy Governing Board will monitor the academic, financial and performance of the charter school in accordance with the Charter School Performance Framework (CSPF). This detailed performance framework will be used as a tool for decision making and sets forth expectations of performance and compliance that lay out a plan for monitoring, evaluation, and intervention of the Academic, Financial and Operational performance of Cato Academy. The goal of Meets Expectations (with a minimum of 60 or above points) would be the target with an internal Governing Board goal of no less that a score of 85 on Academic, Financial and Operational scoring.

The following school based committees will collect data, monitor progress, implement corrective action plans as needed: **Academic Accountability Committee (AAC – unique to Cato)** – Lead by the site Principal and made up of Admin team and lead teachers.

**School Advisory Committee (SAC unique to Cato)** – Made up of at least one parent, teachers and administrators. **RTI/MTSS Committee (RtI, MTSS best practice)** – Convened for at risk scholars made up teachers and administrators.

**Admission Review and Dismissal (ARD Texas specific)** – Composed of the Classroom Teacher, Specials Teacher, Admin and Parents – Convened during review of individual scholar IEP determinations.

**Language Proficiency Assessment Committee – (LPAC unique to Texas)** - Composed of a certified EL teacher, administrator, ARD representative as needed, parent representative. Convened for individual scholar second language determinations.

Cato Academy Governing Board Standing Committees: **Academic Oversight Committee** – responsible for academic goals. Reviews the AAC committee findings and executes on board academic directives. **Financial Oversight Committee** – Reviews annual 3<sup>rd</sup> party audits, monthly and quarterly financial reporting. Reviews contracts for ethical contracting to the boards policies. **Governance Committee** – determines the needs of the Governing Board, recruits and trains new board members. The Governance committee will be responsible for the Superintendent’s performance evaluation.

Superintendent Evaluation: The framework for the evaluation will be modified and the Texas Association of School Boards will be used as a resource in formulating the evaluation criteria. See **Attachment 15** for information on the identified Superintendent, Joe Higgins. for criteria on evaluation and information on the selected Superintendent.<sup>32</sup> Superintendent Priority Performance Goals will become the primary tool which the Governing Boards uses to evaluate the Superintendent. These goals should be developed in relation to the school charter contract and Governing Board goals or other priorities established by the board for the superintendent. The Superintendent Evaluation Instrument consists of three parts: **1.** Report on student performance within the framework of the Texas Charter FIRST framework for **Academics**, **2.** Key performance indicators that are outlined under **Financial** and **Operational** metrics of the

---

<sup>32</sup> Texas Association of School Board Framework and best practices. <https://www.tasb.org/>



Texas Charter FIRST annual survey, and **3.** Other Superintendent, management responsibilities set forth by the Cato Academy Governing Board.

In completing the evaluation, the board will consult data provided by the superintendent and other legally appropriate data the board deems relevant. The initial metrics which the board will monitor include: **1.** State of Texas STAAR results, in particular 3<sup>rd</sup>, 5<sup>th</sup> and 8<sup>th</sup> grade end of year scores. The review will include overall academic performance, closing the gap measures and special populations (special ed and EL scholars). **2.** Net Promoter Score survey's from stakeholder groups including parents, teachers and administrators. Conducted by the stakeholder lead School Accountability Committee (SAC). **3.** Teacher turn over and exit survey reporting. **3.** Annual auditor's report from a third party auditing firm. **4.** Legal actions and their resolution or progress. **5.** Academic Accountability Committee (AAC) reporting, follow up and execution. Including NWEA-Map benchmark analysis.

In assessing performance on both the goals and the ongoing responsibilities, the board will consult data provided by the superintendent on a form that encompasses data referred to in the annual goals directive from the board, and other data the board as a whole deems relevant to the assessment. At the start of the evaluation cycle, the board and superintendent shall agree upon the process for evaluation and weight given to each part. In determining the Superintendent, the Governing Board will review the most up to date criteria form TEA on Superintendent evaluation. In particular 19 Tex. Admin. Code § 150.1031 requires that a student performance domain, "at a minimum," be considered in the evaluation. In addition, the information in a charters annual performance report as set forth in Tex. Educ. Code § 39.306 must be a primary consideration of the board for the superintendent's evaluation. Tex. Educ. Code § 39.307(3)(C).

**Academic System Plan Framework;** To ensure TEKS standard adherence, quality instruction, fidelity on curriculum effective professional development, student growth and monitoring of special populations (Special Ed and EL learners), the Cato Academy governing board will employ a series of overlapping systems to include; 1. Standards aligned curriculum delivered via Schoology, textbooks and a detailed scope and sequence including 'I Can' Statements for individual lessons and 'Exit Tickets' for unit wrap ups. 2. Lesson planning auditing and monitoring by administration 3. Data assessment via NWEA-MAP testing, and annual STAAR testing. 4. Ongoing teacher evaluation and feedback using the LoTi teacher evaluation tool. This tool will be used by administration and the PD team and cross compared to each other. 5. Master Teacher or Lead Teacher support at particular subject areas or grade levels. 6. A comprehensive Professional Development department including frequent group and one on one coaching. 7. Reporting, quarterly to the Governing Board by the Academic Oversight Committee using a set of criteria that allows for a comprehensive review of objective and subjective data points. 8. Principal training and board oversight of the Administrators role including stakeholder surveys and accountability to agreed upon management goals. The Governing Board has established the goal of being ranked an A school using the Charter FIRST Academic Framework. The following sections define the management, reporting and corrective actions built into operations to achieve that goal.

The school will establish an **Academic Accountability Committee (AAC)** which will be responsible for review and edit based on the prescribed protocols. The Board directed focus on academic accountability will focus on the school's overall A-F accountability rating, closing the academic gaps data, EL proficiency for the EL population, and Campus Status.



The AAC will be lead by the school Principal. The AAC will have academic oversight with regarding to CURRICULUM, ASSESSMENT, INSTRUCTION, and PROFESSIONAL DEVELOPMENT. The AAC reports quarterly to the Cato Academy Governing Board with summary reports and suggested changes if any. The Governing Board will update policies, accept or reject changes if needed to ensure academic accountability.

**Curriculum Choice:** The choice of curriculum will be based on alignment to clear and measurable learning outcomes which will be set by the Governing Board, with the help of the schools Superintendent and Principal annually. The academic targets will be on the TEA school overall A-F ranking, closing the gap, and academic standards. The final scope and sequence will be based on TEKS standards for ELA and mathematics, the Science, and ELL best practices and standards. Curriculum partners, Great Books Foundation, Bookworms.com, Singapore Math and iStation/Saxon, CK12 and Houghton Mifflin Harcourt Science, will be consulted for knowledge and expertise. Intervention and enrichment resources will be selected to meet the student population.

To determine the effectiveness and mastery of the curriculum, the AAC committee will review defined data points quarterly and STAAR testing annually. The AAC will use this framework to point to curriculum gaps or instructional deficiencies. The evaluation process will include quarterly data analysis by individual teachers from the NWEA MAP test results, as part of the schools data driven instruction plan. Teachers will follow an 8 Step Data Analysis Plan for their individual classrooms. The AAC will oversee the individual teacher goals. Each teacher will submit to the Vice Principal and AAC their Class wide Data Analysis Form. The committee will review these forms and look for global issues that may point to curriculum issues that may require immediate corrections. For subgroup populations, particularly special education and EL scholars, adjustment will be made in the curriculum, pacing and delivery of instruction to match for their particular needs. The NWEA-MAP analysis of sub population will allow for customized instruction to the subgroup scholars. The teachers will have access to additional tools including iStation, Study Island, and all Edmentum's digital resources.

The ability to meet the needs of a diverse student population is one of the major benefit of using a Learning Management System such as Schoology. Schoology allows for customization, the ability to adjust pacing, the ability to flip or blend the classroom and the tools to look backward and forward and the data that supports higher academic outcomes for all students.

**Responsible Party** – Curriculum Implementation; Launch Year, the School Principal will work with the curriculum publishing teams and deconstruct the TEKS standards to write measurable learning outcomes which will be the basis of a scope and sequence. **Time Frame of Curriculum Reviews** - By February of the launch year, the Kinder to 8th grade scope and sequence will be completed and corresponding textbooks and lesson resources will be built into the LMS/Schoology. Annually, the AAC will review curriculum based on benchmark data, STAAR end of year results and teacher feedback. Any TEA policy changes will be incorporated in the annual curriculum reviews. A full report by the AAC to the Governing Board will be made by the school Principal each summer as to the suggested changes in curriculum that may be merited.

**Evidence of Curriculum Choice Completion:** For immediate academic issues, the AAC and school Principal will make adjustments mid year if needed. The AAC will report quarterly



to the board on their findings from review of academic performing. During the summer, an updated and rolled out scope and sequences will be provided for summer PD in services. New textbook selections and lesson resources will be finalized and rolled out prior to school starting. Training and implementation on new resources will be covered at the summer PD kick off training.

**Curriculum for Subgroup Populations:** The School Principal and Admin team as well as the Special Ed Lead will review quarterly data (NWEA benchmark and LoTi pop in teacher observations) to evaluate the curriculum and implementation fidelity for Special Education and EL students. The Sped Director will review and report for their particular student population. The EL teacher will analyze and report data to the AAC team for their population and the entire committee will analyze data for special populations. If the curriculum is determined to be an issue in academic growth, additional or improved supplemental materials for that standard will be developed and/or provided according to the steps laid out above. For subgroup populations, particularly special education scholars, adjustment will be made in the curriculum and delivery of content to match for their particular needs. The ESS department will have full access to additional digital resources to including iStation, Study Island, and all of Edmentum's digital resources. The Special Education department is supported with the same curriculum content and delivery process as is available to the classroom teachers. The philosophy of Cato Academy is to first focus on in classroom special education services with minimal pull out services.

**Assessment and Academic Data Tracking Plan:** Cato Academy will contract with NWEA-Map assessments beginning in 2<sup>nd</sup> grade. Using internal assessment data from NWEA-Map, the Cato AAC team can quickly isolate low scores and determine if the issue is a curriculum based or isolated to a particular instructor. With curriculum that is paced correctly and which calls out the various standards to be focused on during the particular unit we can assure that we have a common foundation from school to school. The data driven instruction becomes an identification tool to help with our differentiated instruction inside the classroom or as an intervention tool.

The following assessment data will be analyzed on a per scholar: **1.** DIBELS- Dynamic Indicators of Basic Early Literacy Skills (K3) **2.** Teacher developed pre-assessment and post-assessment (all grades) **3.** Teacher developed rubrics for writing and oral skill mastery (TEKS ELA standards 1, 11 and 12) **4.** Math Fact Fluency Assessment goals by grade (as outlined by NWEA-MAP – TEKS – iStation - all grades). **5.** RIT Word Fluency Assessment goals by grade (as gaps are identified in NWEA-MAP all grades) **6.** NWEA Math Progress Monitoring Assessments (2<sup>nd</sup> grade and beyond). **7.** Scholar Report Cards and progress monitoring (all grades) **8.** Historic review of Texas STAAR results by grade band as well as key grades of 3<sup>rd</sup>, 5<sup>th</sup> and 8<sup>th</sup>. **9.** NWEA-MAP quarterly scholar assessments (beginning in 2<sup>nd</sup> grade)

Each teacher will follow a prescribed, **8 point plan for analyzing their student (NWEA-MAP) benchmark data.** This process includes the teachers strategy to address learning gaps, address special populations and establish S.M.A.R.T. goals to achieve prior to the next NWEA Benchmark test(part of the teachers 8 step data analysis protocol). The teacher generated lesson plans will be audited by the Principal and ACC team for completeness. For all students, testing data will be analyzed and broken down by strand a series of intervention programs will be employed to achieve maximum student growth; **1.** Study Hall or one on one tutoring with the teaching staff (to occur during mandatory weekly 2 hour teacher study hall). **2.** Purposeful Pause



in content delivery if entire portions of a class need assistance **3.** Dedicating class time to differentiate in ‘Crash Course’ by strand instruction. **4.** Advanced scholar strategy to challenge students who can advance beyond their grade level. **5.** Differentiated Instruction – and the training needed for all teachers to successfully implement differentiation techniques in their classroom. **6.** Progress monitoring with additional testing on standards that need additional support. **7.** Third party cloud based subscription services such as Study Island. **8.** Parent Volunteers and or tutor clubs. **8.** Referral to RTI/MTSS and intervention

**Assessment with Referrals to RTI/MTSS:** RTI/MTSS team will review academic performance of individual students that need supports above and beyond classroom interventions. The RTI/MTSS team will implement a learning plan to ensure success of all students. The analysis will include: **1.** High quality, differentiated core instruction in an environment that is responsive to social, emotional and academic and behavior goals. (monitored by the PD and Admin team). **2.** Data informed decision making. Review of goals, prior data, improvement and trends. **3.** Progress monitoring using benchmark testing. **4.** Layered hand offs for a continuum of academic, social, emotional and behavior supports. **5.** Family, School and community partnership as available. **6.** Professional Development offerings and tailoring to meet the particular needs of a teacher or the entire school. **7.** The Hexagon Tool<sup>33</sup> is a framework to score a schools ability to react and sustain a comprehensive program. The Hexagon Tool includes the MTSS/RtI team grading the schools capacity at any given time of the following – 6 Point Plan Includes: **1.** Needs of students; how well the program or practice might meet identified needs. **2.** Fit with current initiatives, priorities, structures and supports, and parent/community values. **3.** Resource Availability for training , staffing, technology supports, curricula, data systems and administration. **4.** Evidence indicating the out comes that might be expected if the program or practices are implemented well. **5.** Readiness for Replication of the program, including expert assistance available, number of replications accomplished, exemplars available for observation, and how well the program is operationalized. **6.** Capacity to implement as intended and to sustain and improve implementation over time. **Tier 1 and 2 – Classroom**

**Differentiation** - Once scholar’s skills needs have been identified, teachers will implement a differentiation strategy that best fits their unique class dynamics. The methods that teachers are trained on by our Professional Development team and the process administration is tracking include; Lessons that are differentiated by a choice of content, process or outcome goal. The grouping will be done by student interest, skill readiness or learning profile. The tactics employed by the teacher in the classroom will include flexible grouping, student choice, and learning centers. Ongoing monitoring and adjusting are crucial to a successful differentiation program. Students in the 20-30% of grade level proficiency will be enrolled in the Cato Academy intervention program and move to Tier 3 – Pull out intervention. **Tier 3 - Pull Out Intervention:** Certain scholars will be identified as needing beyond classroom support and will be enrolled in the Cato Academy Intervention Program. Tier 1 and 2 interventions primarily occur with the classroom teacher. Tier 3 interventions for struggling early readers involve identification and constant monitoring and small group pull out instruction. In the intervention department, that team has a number of digital options including the iReady English program and workbook as well as the iReady assessment tool to monitor progress. Wilson Foundations (wilsonlanguage.com) has been identified as an intensive intervention system and will be

<sup>33</sup> Metz, A. & Louison, L. (2018) The Hexagon Tool: Exploring Context. Chapel Hill, NC: National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill. Based on Kiser, Zabel, Zachik, & Smith (2007) and Blase, Kiser & Van Dyke (2013).



available on an as-needed basis as well as the open source resources developed by Dr. Sharon Walpole from the University of Delaware and found at Bookworms.com.

If academic achievement expectations or goals are not met, the leadership team will also analyze data and operations to determine if there are deficiencies in instruction to include curriculum and or teacher instructional techniques. The corrective action steps would include the following: **1.** Additional observations of teachers to identify poor instruction, classroom management, or root cause issues that may be affecting student outcomes. **2.** Referral to the school leadership team to analyze curriculum and resources to ensure proper alignment of state standards. **3.** Revamp the Enrichment and Remediation (E/R) instruction in middle school to better meet the needs of students who are not meeting academic expectations. **4.** Address teacher training and professional development offerings to specifically address shortcomings in academic expectations or goals. **5.** Analyze and adjust student ability grouping via differentiation in lower grades and class enrollment in middle school, where necessary. This would happen for both reading groups and the math block. The Principal would be responsible for implementing corrective action if expectations or goals are not being met. The Principal will enlist the assistance of the lead teachers, the Academic Accountability Committee (AAC) team and the schools governing board in order to take immediate corrective action.

**ARD – LPAC and Assessment:** Should assessment and observations merit an ARD committee meeting on a particular student the ARD team (classroom teacher, special education teacher, parent, administration) will review gathered data and determine an individual academic plan and IEP if merited. When a student with a disability is, or might be identified as an English language learner (ELL), the student's admission, review, and dismissal (ARD) committee must work in conjunction with the language proficiency assessment committee (LPAC) to determine appropriate entry and exit criteria for a bilingual education or English as a Second Language (ESL) program. (19 TAC §§89.1226(h), (l), and (m)) .

**Assessment - Teacher Based Benchmark and Final Exams:** Teacher created content-specific Benchmark and Final Exams are required in every Cato Academy course. These assessments provide teachers with essential data regarding the effectiveness of their teaching and the curriculum. Teacher generated quarterly and midterm exams provide teachers and scholars with the opportunity to measure the amount of learning at the mid-point in the semester. Final Exams provide teachers and scholars with the opportunity to summarily measure the total amount of learning over the entire semester. Triangulated with teacher generated exams is the quarterly NWEA-MAP assessments which benchmark each grade level to national cohorts. Instructional staff will be trained and monitored on their formative and summative assessments occurring in their classroom. Some of the techniques teachers will be expected to implement include:

**Formative:** Check for Understanding - Throughout the lessons, the Teacher will regularly check for understanding using a variety of methods: **1.** Class response system – thumbs up thumbs down. **2.** Q&A. **3.** Exit Tickets. **4.** Classroom quizzes. Define Success – Socratic feedback and tracking -The teacher provides students with an open-ended question related to a concept they are studying and asks the students to identify the information or details necessary for a response to demonstrate full understanding of the concept. A list of these details is recorded on the board Quiz with Student Cross Grading – Each unit of instruction, typically 4 weeks, will involve one or two quizzes prior to the End of Chapter Test. Quizzes will be graded by fellow



students and time will be devoted for time to pair and share between students to solve quiz answers that are not correct.

**Summative including:** **1.** End of Chapter Testing – Students will be given an end of chapter test with instructions to show their work. The grading rubric will include 75% of the overall grade will go for the correct answers and an additional 25% for correct showing of how the student arrived at the answer. **2.** Summative Assessment Analysis and Adjustment –following summative assessment results, the teacher will determine if the entire class should be reinstructed on the particular topic or if a differentiation program should be implemented to ensure mastery of the subject. **3.** Homework Help Program – Students are asked to place the homework that they are struggling with on the board. Other students then begin working through the steps of solving the equation with the student struggling with the work functioning as teacher – fielding and directing the discussion.

**First Year and Assessment:** The team realizes that the first year of a new school will be the most difficult to see student test outcome growth. The teaching team will be allowed flexibility in content delivery and pacing. The nature of a Classical Education model is that courses naturally build upon themselves leading to a deeper ability to recall information and formulate ideas. During the summer, the administration will convene the **Academic Accountability Committee (AAC)** to review the English, Math and Science curriculum to ensure the students are progressing towards content mastery. The team will solicit feedback from the teachers at the end of the year to ensure student engagement is also factored into any potential curriculum changes. Prior to the start of summer teacher in service all curriculum suggested changes, justifications for those changes, negotiations with textbook manufacturers and support services will have been made.

**Monitoring of Instruction:** Over the year, 12 to 18 (at a minimum) LoTi pop in Teacher Evaluations, (Levels of Teaching Innovation) will be made by the Principal, VPrincipal and PD. LoTi delivers consistency in teacher observation, curriculum implementation and classroom engagement. The LoTi observation and tracking platform scores will be reviewed by the Principal and Vice Principal. Combining LoTi scores with data based instructional analysis will show the admin team areas of instructional concern. Through pop in observations and calibrated scoring by multiple admin team members, LoTi delivers consistency in teacher training, curriculum implementation and scholar engagement. LoTi was designed by Dr. Chris Moersch as a way to assess the most critical aspect of a scholar's education, a great teacher in the classroom. Dr. Moersch is the author of *Beyond Hardware: Using Existing Technology to Promote Higher Level Thinking*. Dr. Moersch has developed his program using the Danielson Rubric model which also incorporates a student engagement component known as H.E.A.T. (Higher order thinking, Engaged learning, Authentic connections, Technology use). LoTi has been customized to go beyond a generic Danielson Rubric model to include elements of Classical Education such as Socratic discussions, interconnected subjects and values/virtues incorporation into lessons.

H.E.A.T is used as a lens to go beyond the lesson plan to what is actually happening with students. Many times the activities that the teacher plans do not result in the expected output from students. H.E.A.T. provides a common language to discuss and measure student output in a way that is tied to evidence based practices. LoTi involves teacher drop in observations, real time and engaging feedback from the administration, and a quantifiable tool to gauge the H.E.A.T. student engagement. These tools and the feedback and lay out a re-training process gives our



school network a common platform to assess the effectiveness of a teacher in the classroom. The goal of the Cato PD team is to shift to deeper learning practices that work. LoTi builds a map for teachers, coaches, and leaders to create successful collaborative learning environments. The LoTi program helps refine a teachers skills and ensures program of instruction is being followed and delivered at a high level. All teachers will be required to post TEKS aligned learning objectives for each of their lessons. Within Schoology, the teacher will find pre-printed 'I Can' standards aligned posters to coincide with each lesson of instruction in the core classes. These 'I Can' Statements will be provided at the correct lessons via the Schoology content delivery system. The Schoology delivery platform also has embedded unit based 'Exit Tickets', which are designed to give the teachers an end point of where their instruction will end up. These exit tickets are standards based and scaffold to follow the instructions of history, science and the novels being covered in ELA.

**Instruction Delivery For SubGroups:** As part of our monitoring of student subgroup populations, the school will implement a Response To Intervention (RTI) or Multi Tiered System of Support (MTSS) to review academic performance of individual students and teachers and implement a learning plan to ensure success of all students. The analysis will include' 1. High quality, differentiated core instruction in an environment that is responsive to social, emotional and academic and behavior goals. 2. Data informed decision making. Review of goals, prior data, improvement and trends. 3. Progress monitoring using benchmark testing. 4. Layered hand offs for a continuum of academic, social, emotional and behavior supports. 5. Family. School and community partnership. 6. Professional Development offerings and tailoring to meet the particular needs of a teacher or the entire school. If the RTI/MTSS or administration determines special services may be merited (special education, IEP, English Learners) then a referral to the ARD committee will be merited.

**Professional Development Strategy:** Curriculum and instructional best practices will be trained to all staff prior to launch of the school. The School Principal will work with curriculum vendors, department chairs and the Admin team to ensure proper training and implementation of the curriculum. 8 to 12 LoTi pop in observations will occur by the admin team annually to ensure; proper lesson planning, fidelity and consistency of curriculum delivery, student engagement and teacher effectiveness. The LoTi scores will serve as evidence of professional progression and provide a roadmap for any areas of focused training for a teacher. The student benchmark data (NWEA-MAP) will be used to triangulate teacher effectiveness (LoTi scores), with academic growth to create actionable responses to measurable data points. Twice per year in for new teachers and at least once per year for all teachers, the Principal will formally conduct a teacher review using the Danielson Rubric as a guide. These reviews will become a part of the teachers employment file.

**New Teacher Summer Orientation** Professional Development is a key priority in the Program of Instruction and the Academic System Plans thru the a comprehensive professional development plan. During the summer, the administration and Master Teachers will meet to determine the professional development goals for the upcoming year. To ensure all new and returning staff is prepared for each academic year, all teachers will report for a five day training program lead by the school Principal, PD staff, textbook publisher, Master Teachers and the administration. Prior to each school year, school leadership will host a five-day orientation and in-service training program for our teachers and other staff to provide an orientation to the PD program. Teachers will work individually and in teams according to grade level, as well as with a



group of teachers in order to align the curriculum, assessments, and standards across grade levels so that they teach a rich, coherent curriculum aligned to state standards.

The end goal of the Professional Development strategy at Cato Academy is to integrate the academic, athletic, community service and social emotional learning into the following framework: 1. A focus on deep learning rather than shallow knowledge. 2. The ability to assess mastery using a number of measures. 3. A focus on innovative learning methods that are rooted in the Classical Education framework but integrating for technology, media, problem solving skills all with a goal of higher order thinking skills development. 4. A balanced approach of instruction from Socratic/Shared Inquiry (Great Books Foundation), to direct instruction, differentiated instruction that meets each scholar where they are at and small group and community based learning. 5. Character development and Social Emotional Learning is integrated into everything we do at Cato Academy. From in the classroom, in the lunchroom or on the athletic fields, character development is an everyday role of all staff members at the school.

The professional development plan improves instructional practice with weekly opportunities to engage deeply in basic to advanced techniques aimed at developing confidence in teaching in a Classical Educational environment. The site administration with the support of the PD team helps foster strategies to bring passion to every lesson, and collaborate on the design of highly targeted, actions. 1. Continual and collaborative professional learning Individualized coaching 2. Weekly, school based professional development workshops 3. Virtual Professional Development Library using open source videos, research topics and articles tailored to specific areas of good teaching or specific to the Classical Education model.

**Individualized coaching.** Teachers and leaders share coaching relationships that support individual growth in content, pedagogy, and culture. The Cato Academy staffing model includes a dedicated position for PD-Curriculum and Data analysis professional. This staff position works under the leadership of the Vice Principal and Principal and is focused on instructional quality and content fidelity. Regular classroom observations provide opportunities for real-time feedback, while coaching sessions focus on incremental improvement towards the attainment of larger goals.

**Weekly, school-based professional development workshops.** Once per week, students are dismissed early and schools hold professional development workshops targeted toward improving school-wide practice. Workshops deliberately build key skills across practical, relevant topics such as culture, instruction, analysis of student work, and curriculum. A menu of in person course offerings will be created and distributed to the teaching staff. Depending on budget capacity, substitute teachers will be brought in to facilitate job embedded training. Classes will be scheduled for morning and afternoons to allow the maximum number of teachers to participate while the substitute teachers on campus.

**Leadership Training- Ongoing development of school leaders** Strong school leadership teams are critical to creating an environment for great teaching. The Governing Board will dedicate resources to coaching and training school Principals and administrations to become highly effective instructional, cultural, and organizational leaders. Our model includes a dedicated Professional Development team member at each campus. These team members focus all of their efforts

on growing and supporting their career goals. These PD team members range from a stipend teacher that dedicates part of their time to training goals to full time PD training professionals.



**Financial Oversight:** The Governing Board understands the short and long-term economics of the school and has systems in place to monitor short and long-term financial health. The framework for financial indicators will be based on the Charter School Financial Integrity Rating System of Texas (Charter FIRST). As described in 19 TAC §109.1001. The report will be presented to the Governing Board annually and published in a local newspaper to inform taxpayers of the meeting no more than 30 days and no fewer than 10 days before the public meeting. A management report will be prepared by the Governing board in accordance with Title 19 Texas Administrative Code Chapter 109, Budgeting, Accounting, and Auditing Subchapter AA, Commissioner's Rules Concerning Financial Accountability Rating System, Section 109.1001(q). Effective 8/1/2018. The report will include the Superintendents current contract, board and superintendent reimbursements, outside compensation received by the Superintendent, gifts received by Governing Board members (and their first degree relatives), and any business transactions between the charter board members and the school. The Financial Oversight Committee will provide reporting in alignment with Charter FIRST to include the schools; Overall performance on Charter FIRST, cash on hand analysis, ratio of current assets to liabilities, revenues equal to or exceeding expenses, debt service coverage ratio.

As part of the Governing Boards financial oversight role, the Superintendent will provide an orientation to all new board members on the fiduciary role of a non-profit Governing Board in Texas. The Governing Board will monitor break even enrollment numbers, preliminary and annual budgets as presented by the Superintendent. As part of long range planning for the school the Governing Board will monitor a 5 year projected budget and analyze future needs that may significantly affect the budget.

**Establishment of Finance Committee:** The Finance Committee shall consist of at least two Directors, one of whom shall be the Board's Treasurer, and the Superintendent and School Principal. The Financial Committee shall meet at least two (2) times per school year. The purpose of the Financial Committee shall be to prepare annual budgets for full Board review and approval, coordinate the Annual Audit, and develop long-term financial goals and plans for full Board consideration. Financial reporting will be reviewed monthly with analysis of the Profit and Loss, Balance Sheet and analysis of Budgeted vs Actual. The Governing Board, will establish financial policies and procedures and compile a manual as guidance to the Superintendent and school operations. As part of the development of the policies and procedure policy, the following framework will be part of the finished manual: 1. Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts. 2. All documentation related to financial matters will be completed by computer, word processor, typewriter, or ink. 3. The Governance Council can appoint someone else to perform the Superintendent's responsibilities in the case of absence. 4. Establishment of a Purchasing Policy - The Superintendent may authorize expenditures and may sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000. 5. Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, asset management are all policies that will be established by the Governing Board and executed by the Superintendent. 6. Petty Cash and Credit Card Use Policy will be established using framework that is generally acceptable to Charter School cash handling procedures.



**Contracts.** Consideration will be made of in-house capabilities to accomplish services before contracting for them. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the school.) Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Superintendent will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Superintendent will be responsible for ensuring the terms of the contracts are fulfilled. Potential conflicts of interest will be avoided and at the very least disclosed upfront and reported in the annual Charter FIRST management report. The Superintendent and/or Board Member(s) with the conflict will excuse themselves from discussions and from voting on the contract.<sup>34</sup>

It is anticipated that Contracted services will provide (a) back office support encompassing human resource services (b), payroll processing, (c) state and federal compliance services, (d) auditing of receivables payables and general accounting services (e) external vendor oversight including special education vendors, transportation services, lunch vendors. Business services will include reputable and established charter school vendors with multiple years of experience in the Texas charter market.

**Financial Audit:** The Governing Board will commission an annual financial audit by an independent third party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to the charter-granting agency. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to: a. An audit of the accuracy of the financial statements. b. An audit of the attendance accounting and revenue accuracy practices. c. An audit of the internal control practices.

It will be the responsibility of the Governing Board and Superintendent to correct any financial audit issues identified. The financial measurements identified in Charter FIRST and detailed in this section will be the responsibility of the Superintendent to manage at the board specified 85% or greater level.

**Operational Oversight and Charter FIRST scoring.** The Governing Board will task the schools Superintendent to report annually on the directives outlined in Charter FIRST regarding operations. The following categories will be measured and an annual report provided to the Governing Board as to the compliance in: **Teacher Qualifications** (in accordance with TEC §12.129, 19 TAC §100.1015(b)(3)(F), **Special Education Populations** (defined at TEC §12.104(b)(2)(F), 19 TAC §100.1032(1)(D) and **EL/Bilingual Populations** (defined at TEC §12.104(b)(2)(G), 19 TAC §100.1032(1)(D). (Program Requirements), **Timely filing of governance reporting** (defined at TEC §12.119(b), 19 TAC §100.1007), **Training**

---

<sup>34</sup> National Charter School Resource Center  
Generation 25: <<Cato Classical Academy>>



**requirements of board members and administration** (defined at TEC §12.119(b), 19 TAC §100.1007) , **Criminal records employment requirements** (defined at TEC §§ 12.120, 12.1059, 22.0832, 22.085, 19 TAC §100.1151) , **PIEMS filing** (timely filing TEC §12.104), **TREx usage requirements and training** (student records TEC §7.010, TEC §25.002(a-1), 19 TAC §129.1025 ) , **Building Certificate of Occupancy up to date** (defined at 19 TAC §§ 100.1215(b) and 100.1001(3)(E)), **Administrative Cost Ratios, Maintenance of 501c3** reporting (defined at TEC §12.101, 19 TAC §100.1217), **50% participation of students at tested grades** (defined at 19 TAC §100.1015(b)(3)(G)) , **eligibility for participation of child nutrition** (as defined at 19 TAC §100.1022(c)(1)(A)(xi) and 100.1032(2)(N)), **handling of secure assessment files** (defined at TEC §39.0301-39.0304, 19 TAC §101.3031.)

The Superintendent will provide an update to the Governing Board at least per year on the status of the Operational Oversight Plan. The Superintendent will be charged to complete these tasks and his performance review will be based on achieving a score of 85% or greater on the Charter FIRST Operational Framework plan detailed above. If the target of 85% is not achieved a negative performance review will be given to the Superintendent which may result in termination if not remedied.

**Board Composition – Recruitment – Background – Accountability** - This is the first K8 charter school the Governing Board is submitting for approval. The Superintendent as financial and overall leader and **Principal**, as the site manager, are responsible for the proper execution of each of these identified activities and goals put forth by the Governing Board. Once identified, the Principal will be an individual with long standing in both the local community and the community of educators with multiple prior years of experience in school leadership. He/she will have experience as the leader, trainer, and evaluator of educators and will establish the Cato Academy culture through standards, guidelines, trainings, directives, and example. As the “instructional leader”, classroom instruction will be a direct responsibility and daily concern. This position will be filled with an experienced individual. **Teachers** will be the responsibility of the Principal as providers of student instruction.

The Governing Board will be directly and actively involved in the start-up year as well as the operational years to come. The Governing Board will establish a School Advisory Council beginning in year two. **The School Advisory Council (SAC)** will include members from the school community including no less than one (1) member from; the parent community, the teaching staff, administration, student leadership, community members at large. The School Advisory Council will advise the Governing Board on policies relating to academics and extracurricular activities at the school. The SAC will be asked to advise the Governing Board on budgetary priorities, community relations, and other issues identified by the Governing Board. The SAC will be tasked with performing an annual stake holder survey (using the Net Promoter Score framework<sup>35</sup>) of the school community and present the results at the last Governing board meeting of the school year. The role of the SAC is advisory.

The Governing Board of Directors that has been assembled has the legal background, non-profit leadership experience and business acumen to ensure a successful school launch. The Board of Directors may expand the board to add community members and may create advisory committees as needed and on an ongoing basis. The mission, vision and core values of the Cato Academy will be the guiding focus of the Board in its governance role. The Board shall have all the powers and duties required and/or permitted by applicable law.

---

<sup>35</sup> Net Promoter, Net Promoter Score, and NPS are trademarks of Satmetrix Systems, Inc., Bain & Company, Inc., and Fred Reichheld.



Cato Academy is committed to quality in all aspects of its operations and will use all resources and guidance from established, high-quality sources including the following: 1. Financial oversight - Academic oversight 2. Regulatory oversight 3. School goals and accountability 4. Leader support and evaluation 5. Composition and structure of the board itself 6. Open meetings

*Board Officer Descriptions*

- Board Chair- The Board Chair will call and preside over all the meetings of the Governing Board. The Chairperson shall be entrusted with the power to sign all certificates, consents, contracts, or other instruments of the School which are approved by the Board. The Chairperson shall exercise and perform such other powers and duties as may be prescribed by the Board from time to time. Dr. Nicholas Ellen has been elected to be the Chair of the Governing Board. Dr. Ellen has extensive administrative and educational background.
- Board Vice President- In the absence of the Chairperson or in the event of the Chairperson's disability, inability, or refusal to act, the Vice-Chair shall perform all of the duties of the Chairperson and in so acting, shall have all of the powers of the Chairperson. The Vice-Chair shall have such other powers and perform such other duties as may be prescribed from time to time by the Board or by the Chairperson. Renee McGuire has been elected to serve as the Vice Chair. Mrs. McGuire's background in community leadership, non-profit service and real estate development in and around the Pearland/Alvin/Houston area will be invaluable during the start up and initial periods of operating the school.
- Board Secretary and Treasurer- The Secretary shall keep or cause to be kept a book of minutes at the principal office or at such other place as the Board may order all meetings of the Board with the time and place of holding, whether regular or special and if special, how authorized, the notice thereof given, the name or names of those present at the Board meetings and the proceedings thereof. The Secretary shall give or cause to be given notice of all the meetings of the Board required by these Bylaws or by law to be given and perform such other duties as may be prescribed by the Board from time to time. The Secretary shall exercise and perform such other powers and duties as may be prescribed by the Board from time to time. The Governing Board has elected Jignesh Desarani to serve as the Treasurer/Secretary. Jignesh has extensive experience in C level management of international corporations in various industries.
- Superintendent- The Superintendent is an elected officer of the corporation and is directly responsible for implementing all policies and procedures approved by the Board. The Superintendent is not a voting member, or corporate member of the Governing Board. The Superintendent has the power to contractually bind the Cato Academy according to the by-laws and stated board policies regarding contracting. The Superintendent is the primary point of contact regarding Cato Academy charter application. **Joe Higgins** elected the Superintendent. Mr. Higgins has extensive background in business operations, policy, and development and charter school operations.

*Composition of school governing body.*

The Board will regularly review the collective strengths and expertise of its members, with a focus on garnering expertise in the following areas: accounting; auditing; community service; curriculum development; education and teaching; educational leadership; fundraising;



entrepreneurship; human resources; legal issues; management; marketing; public relations; real estate; and strategic planning. The Governing Board is committed to diversity in all aspects of its operational and activities and at all levels of the school. The Governing Board highly values diversity and supports the election and appointment of diverse candidates to the Governing Board. The Board believes that having directors of diverse gender, race, and ethnicity, along with varied skills and experiences, contributes to a balanced and effective governance.

The Governing Board recruits members who are qualified, in terms of training, education, and experience, and who have garnered credibility and respect. Board members will be recruited as a seat becomes available. After the Charter Contract is approved, the existing Board will establish Board Classes with staggered terms so that there will not be a complete turnover of board members in a given year. Each year, at a duly noticed meeting, the Board will choose officers from among its members to include a President, Vice President, Treasurer, and Secretary. *Qualifications* Cato Academy understands the importance of compiling a board of directors who bring a different set of knowledge, skills and abilities. The Cato Academy Governing Board will seek to fill board positions with individuals who meet the following qualifications : Governance Experience, Organizational Leadership, Education/ Teaching, Education/ Administration, Fundraising, Marketing/ Promotion/ Public Relations, Finance/ Accounting, Business Development, Community Connections, Legal/ Regulatory, Charter School Experience, Grant Writing

## **Talent Management and Development**

### **Talent Management**

Enter narrative response to the prompts in this section of the application. *Reference Attachments 22-23 in the response.*

#### **Recruitment timeline:**

A new hire represents the school and its future and along with other new hires will help shape image, culture, and scholars for years to come. The hiring decisions are critical to the success of the school and for scholar success in the classroom. The school Principal will be identified through marketing and recruitment efforts beginning in December/January of 2020/21. Their contract will be finalized and the school leader will be on boarded begin in April/May of 2021. The recruitment for the Teachers, Special Education Specialist, Registrar/School Assistant, Office Manager, Student Services, Counseling, Curriculum/Data/PD Coach, and Classroom Assistants will begin in January of 2021 with the Superintendant, Mr. Higgins and support from one or more of the members of the Governing Board reviewing initial applications and conducting early interviews.

Cato Academy will have Principal position and operations manager in place on or around April of 2021. Employment for both will begin by May 1, 2021. Following the School Principal position being filled, the school will start the process for hiring teachers and support staff. Teachers will be interviewed in April - May 2021, and the employment agreement will be executed in June 2021.

Employment will begin on July 1, 2021. Teachers will be contracted for 11 months and work 195 contract days, which is reflected in the budget. The Special Education Specialist will be contracted for 10- months and will work 190 contract base days as accounted for in the



budget. The marketing program for teacher recruitment is thorough and has been used by the leadership team in the local market in the past. The recruitment will include job postings, marketing for reach to area teachers. Teacher interviewing and hiring will be conducted prior to school opening. The leadership will look for teachers who are committed, engaged and skillful in their approach to instruction have a powerful, long-term impact on scholars' lives.

The quality of instruction is critical to increased scholar learning and achievement in the classroom and that is why Cato Academy has identified teacher recruitment as an organizational priority. Administration plans to start with its recruitment process in attracting and hiring the very best faculty and staff as early as possible, and each of the candidates for hire will be treated with professionalism and respect in every stage of the recruitment process. 1. Cato Academy plans to share our mission, vision, core values and philosophy when advertising for open teacher and other staff positions in order to attract like-minded candidates whose values fit the values of our school. 2. Share our values, mission, and purpose along with our vision for the future of Cato Academy with potential candidates during the interview. 3. We will support our teachers and show we value them by offering a work environment that includes mentorship, supportive leadership, ongoing professional development, teacher collaboration and planning time during the school day.

**On boarding** Cato Academy is compliant with all statutes relating to fingerprint clearance cards. Pursuant to Texas law, employment offers are contingent upon receipt of the candidate's fingerprint clearance card. Cato Academy recognizes that obtaining fingerprint clearance cards can take several weeks; to ensure that all employees have their cards on file with the school before July when an orientation and in-service is held, every effort will be made to finalize hires by May 15 of each year.

Personnel policies will be developed prior to hiring the Cato Academy staff. The first step is to select a PEO which is similar to a PPO in that these vendors provide paycheck services but a PEO functions as a full service HR department for smaller organizational. Payroll company. The school will select a PEOs that specialize in Human Resource Management services payroll processing, state and federal tax compliance, and benefits administration. These tasks are complicated and crucial to employee satisfaction. PEOs provide a unique co-employment model that grants small employers like Cato Academy access to Fortune 500-level benefits, standardized HR policies and practices, risk management support, and workers' compensation coverage, plus an extensive library of training resources to educate employees and partners on an array of topics. Typically, a PEO will provide the framework for personnel policies and procedures as they serve in a co-employment role. The Principal will contract with a Colorado HR attorney to ensure State of Colorado policies and laws are addressed. All people who perform services for Cato Academy will be considered 'at-will' employees. Cato Academy understands this to mean that employment may be terminated by either party without notice or reason. Teacher contracts will be provided as they are customary in the teaching profession. The contracts will spell out the report date for trainings, the start date of school and the prescribed days off the teachers will be granted. The total contract length will be 195 days per year, to include classroom instruction and in-service training.

**Marketing recruitment and placement:** Costs for recruiting and hiring are allocated to the start-up budget and detailed below. Marketing for prospective teachers and staff will begin 10 months out from the proposed open date. A series of marketing events and efforts will be employed including; job fairs, digital recruitment, print publications, association marketing.



The Principal is primarily responsible for overseeing the selection process and will be the one to offer a contract. Cato Academy will offer the following to interested candidates of our school: 1. Submit an application that will be provided online. 2. Check references included with the application. 3. Submit a cover letter and resume with application. 4. The candidate will be asked to participate in a teaching demonstration. 5. The candidate will be asked to submit a written lesson plan prior to the demonstration. 6. The Principal will conduct the interview; once the administrative team is in place, they will also be a part of the interview process and more than one interview will take place.

Cato Academy will contract with an employee payroll and management company for payroll processing and legal support during the employee lifecycle.

**News Print ADS – Job fair February and March** Pearland's Community Impact Paper (circulation 76,305) 2 ads (4 total) job fair - \$318.75 each \$1,275 total **Mailer** Variable Data Letters 8.5" x 11" @ .13 = \$ 175.50 Envelopes -#10 – 1500 4.125x9.5 @ .25 = \$ 375 Postage for 1,321 mailers @ \$.25 = \$330.25 Mailing services 1,321 mailers @ \$.19 = \$250.99 Total \$1,031.74 **Website** - Post job openings – TBD **Social Media** - Promote opening through FB targeting teachers Total paid ads for 3 months \$2,500 **Non Media Strategy for Recruitment:** The Principal a series of local events with the sole purpose of *Teacher Recruitment* and place advertising of this event on the radio, at nearby colleges, and through social media. Advertise open positions through the use of social media, radio and online job boards. Advertise open positions with job boards of colleges and universities. Establish relationships with the local colleges and universities to open lines of communication within their education programs in order to create a partnership with the local institutions of higher learning. **Total \$4,806**

**Hiring** Hiring new faculty and other staff may be the most important decisions the senior administrator makes with Cato Academy. A new hire represents the school and its future and along with other new hires will help shape image, culture and scholars for years to come. The hiring decisions are critical to the success of the school and for scholar success in the classroom. The Principal is primarily responsible for overseeing the selection process and will be the one to offer a contract. Cato Academy will offer the following to interested candidates of our school: 1. Submit an application that will be provided online. 2. Submit a cover letter and resume with application. 3. The Operations Assistant will screen applications for minimum qualifications. Check references included with application. 4. Fingerprint Clearance process (TEXAS) 5. Candidate will be asked to participate in a teaching demonstration.

**Teacher Retention and Stakeholder Satisfaction Measurement** Study after study points to the single biggest factor of student achievement being a strong teacher in the classroom. To that end, the goal of the Cato Academy governing board is to achieve 85% teacher retention by year three. To achieve this objective a focused approach to teacher recruitment, hiring, training, and discipline are crucial. The governing board believes in the Robert Greenleaf, Servant Leadership Model<sup>36</sup> at every level. From Principal to Custodian, the focus on the school staff is to support scholars, families and each other.

**Tracking and Monitoring Teacher Performance:** Cato Academy will implement the LoTi Teacher Evaluation System, (Levels of Teaching Innovation), teacher evaluation and student engagement system. Through pop in observations and calibrated scoring by multiple

---

<sup>36</sup> Greenleaf, R. K. (1991). *The servant as leader*. Indianapolis, IN: Robert K. Greenleaf Center.



admin team members, LoTi delivers consistency in teacher training and curriculum implementation. The LoTi observation and tracking platform allow the PD Team and the site Administration to score and observe teaching staff. The scoring metrics are consistent and measurable and allows the Cato Academy admin to identify issues and put in corrective actions. The target of no less than 10 LoTi pop-ins will be established for each teacher in a quarter.

To successfully implement and track a training program, their needs to be a common and measurable results-based analysis. LoTi delivers consistency in teacher training, curriculum implementation and classroom observations become critical. These scoring metrics are consistent and measurable and allows the site Administration to identify issues and put in additional training, more one on one coaching or corrective actions. LoTi involves teacher drop-in observations, real-time and engaging feedback from the PD. These tools and the feedback systems ensure that the teacher, Principal and PD team are speaking a common language of what is expected and what quality instruction looks like at the school. LoTi builds a map for teachers, coaches, and leaders to create successful collaborative learning environments. The LoTi program helps refine a teacher's skills and ensures a program of instruction is being followed and delivered at a high level.

All teachers will be required to post State of Texas (TEKS) aligned learning objectives for each of their lessons. These are available to the teachers inside the Schoology LMS in the form of 'I Can Statements' aligned to each core subject.

To ensure standard adherence, quality instruction, fidelity on curriculum Cato Academy will employ a series of overlapping systems to include; 1. TEKS Standards-aligned curriculum delivered via Schoology 2. Lesson planning auditing and monitoring. 3. Data assessment via NWEA-MAP testing. 4. Ongoing teacher evaluation and feedback using the LoTi teacher evaluation tool. This tool will be used by the administration and the PD team and cross-compared to each other. 5. Master Teacher or Lead Teacher support at particular subject areas or grade levels 6. A comprehensive Professional Development department managed and delivered in person or through any of 75+ courses on individual teaching skills located in the Schoology LMS Library. 7. Administration training and board oversight of the Administrators role.

All teachers at the school will receive training on the LoTi observation tool and expectations for what the administration is looking for as mastery. The LoTi tool includes a teacher observation form that is filled out by the teacher after each pop in. The comparison of PD/Admin observation and teacher observation notes make an excellent starting point to coach teacher best practices.

**Net Promoter Score** Staff and family surveys will be sent each year (in March-April) by the governing board to get candid feedback on how the school is performing. The surveys will focus on the Net Promoter Score concept was developed by (and is a registered trademark of) Satmetric It was introduced by Fred Reichheld in his 2003 Harvard Business Review article "One Number You Need to Grow"<sup>37</sup>. The Net Promoter Score (NPS) survey asks stakeholder which include staff and parents, 'On a scale of 1 to 10, would you refer our school to a friend?' The idea of NPS is that every step of the employee or parent experience must be functioning well in order for a high score to be achieved for the entire school. From front desk, to clean floors to teachers in the classroom, to receive a high NPS score all portions of the school's operations must be functioning properly. If there is constant and focused effort on serving the teachers, families and scholars potential unsatisfactory leadership, teacher or staff performance can be

---

<sup>37</sup> Reichheld, F.F. (2003) *The one number you need to grow*, Harvard Business Review, 82 (12)



identified quickly. If there is constant and focused effort on serving the teachers, families and scholars potential unsatisfactory leadership, teacher or staff performance can be identified quickly.

In the event of an unforeseen shortage in teacher recruitment the Superintendent and Principal will look to substitute teacher pools and teacher staffing services to manage the short term gaps.

### **Employee Termination Policies**

Cato Academy hires all employees on at 'at will' employment relationship. Both parties can terminate employment at any time for any reason. When possible, teaching staff will remain in their teaching position until the end of the school year. Minimum disruption to the scholar's academic progress is the goal of all parties. Below are some but not all the infractions that may result in immediate termination; Failure to report arrests and/or convictions as required by policy. Refusal to submit to drug testing upon request, for any of the reasons authorized; Failure to come to work in a 'no call no show' situation or without communicating why there is a long term absence; Upon investigation of a harassment claim finds that harassment has in fact occurred; Flagrant FERPA violations; Insubordination and this discipline may lead to termination; Professional conduct unbecoming of a teacher; Scholar harm in physically or persistent poor teaching without attempts to improve; Misconduct which can occur in various forms and ranges in severity from allegations of direct harm to students (such as physical or sexual abuse) to an act damaging to the education profession (such as falsifying documentation of continuing education courses or cheating on a professional exam). For the most part, misconduct by educators occurs either on the school campus or with members of the school community, but can also be something that happens outside of the school environment and does not involve students.

Cato Academy will comply with Texas State law pertaining to the national criminal history reviews of certified teachers, charter school employees, non-certified staff, contractors and substitutes with details found at: TEA, Ch22, Sub C. The school will also comply with Texas Education Code (TEC) §22.093, which requires our school to report to the commissioner when **any non-certified employee** resigns or is terminated and there is evidence that the employee: Abused or otherwise committed an unlawful act with a student or minor; Was involved in a romantic relationship with or solicited or engaged in sexual contact with a student or minor

The Superintendent will **report certified educators** to the State Board of Educator Certification (SBEC) under TEC §21.006 and Texas Administrative Code (TAC) §249.14. All required reports must be submitted within seven business days after an individual has been terminated or resigned. To simplify the reporting process, superintendents, directors, and chief administrative officers should send all reports to the TEA Division of Educator Investigations.

## **Professional Development and Evaluation**

Enter narrative response to the prompts in this section of the application. *Reference Attachment 24 in the response.*

The PD staff has the primary responsibility for programming of the PD training schedule on the campus. Feedback from teachers, administrators and LoTi pop in as well as NWEA Map data will help tailor a PD schedule on a quarter by quarter basis. The Cato Academy PD team



supports these efforts and includes training and implementation of the Classical Curriculum tools which include sample lesson plans and resources designed to make the teacher's instructional planning as focused as possible.

The Cato Academy PD implementation strategy will address and include; Continual and collaborative professional learning; An Academic Oversight Committee that meets quarterly and monitors benchmark and teacher observation data and takes corrective action as needed; Frequent Pop In Observations and Bi-Annual Formal Observations; Individualized coaching and mentoring; Weekly, school-based professional development workshops; Virtual Professional Development Library

The PD staff and lead teachers at Cato Academy work closely with the site Principal to ensure fidelity in curriculum delivery and content coverage. In combination, the training and content modules found in the Schoology Learning Management system help foster strategies to bring passion, student engagement, thematic units and deeper learning to every lesson.

The governing board's responsibility is the hiring and supporting and if necessary Superintendent. The Principal is charged with the day to day handling of school functions. The school's Principal's primary focus is on the academic and cultural effectiveness of the school. By reviewing a number of performance data points, the governing board can determine if the Principal is achieving their leadership objectives. Some of the data points the governing board will be reviewing on a quarterly basis include: Student benchmark assessments (NWEA-MAP); End of year Texas State Exams – STAAR; Teacher turn over and exit interviews; Net Promoter Score (NPS) data; LoTi teacher evaluation pop-in scores; PTO and School Advisory Council feedback (reported to the board annually) Enrollment targets established by the Governing Board; Academic growth as measured and tracked in this application by the Academic Accountability Committee (AAC) – including cohorts, ELL and Special Needs populations; Community involvement and community impact activities.

**Onboarding** Cato Academy is compliant with all statutes relating to fingerprint clearance cards. Pursuant to Texas law, employment offers are contingent upon receipt of the candidate's fingerprint clearance card. Personnel policies will be developed and approved by the Governing Board, prior to hiring the Cato Academy staff. The school will select a PEOs that specialize in Human Resource Management services payroll processing, state and federal tax compliance, and benefits administration. These tasks are complicated and crucial to employee satisfaction. PEOs provide a unique co-employment model that grants small employers like Cato Academy access to Fortune 500-level benefits, standardized HR policies and practices, risk management support, and workers' compensation coverage, plus an extensive library of training resources to educate employees and partners on an array of topics. Typically, a PEO will provide the framework for personnel policies and procedures as they serve in a co-employment role. The Superintendent will contract with an HR attorney to ensure the State of Texas policies and laws are addressed.

All people who perform services for Cato Academy will be considered 'at-will' employees. Cato Academy understands this to mean that employment may be terminated by either party without notice or reason. Teacher contracts will be provided as they are customary in the teaching profession. The contracts will spell out the report date for trainings, the start date of school and the prescribed days off the teachers will be granted. The total contract length will be 195 days per year, to include classroom instruction and in-service training.



**The Professional Development Calendar: Summer Prior to Opening of School** Cato Academy leadership will host a 5-day orientation and in-service training program for teachers and other staff to kick off the Classical pedagogy program (typically at the beginning of the year). Teachers will work individually and in teams according to grade level, as well as with a group of teachers in order to align the curriculum, assessments, and standards across grade levels so that they teach a rich, coherent curriculum tied to state standards. The start-up budget reflects the cost of paying teachers for the new teacher orientation. After year 1, the teacher contracts will include at least 5, summer in-service days. A dual-track for new teachers (after the first year) and returning teachers will be created to address both needs. **Early Release Days - Weekly, In Service, Early Release PD** Once per week, at the campus, students are dismissed early and schools hold professional development workshops targeted toward improving school-wide practice. Workshops deliberately build key skills across practical, relevant topics such as culture, instruction, analysis of student work, and curriculum. The site Principal will work with the PD Team to tailor offerings to meet the needs of the teachers. A sample schedule will be produced for the entire semester with adjustments made to the PD course programming based on specific needs that are observed in the classrooms. **Virtual Professional Development Courses** Mini-lessons on various aspects of instruction are available online and may be accessed or assigned based on needs identified. These mini-lessons will be found in the Schoology LMS. Content is compiled and organized based on the particular learning objective of the mini-course. Teachers can access professional development opportunities on-demand based on time availability.

**The Professional Development Program: Five Day Orientation – New School and or New Teacher** Cato Academy will host a five-day orientation and in-service training program for our teachers and other staff in July each year (costs included in the annual budget). Teachers will work individually and in teams according to grade level, as well as with a group of teachers in order to align the curriculum, assessments, and standards across grade levels so that they teach a rich, coherent curriculum tied to state standards. The orientation will address the following topics: About Cato Academy: Mission, vision and core values; How mission, vision and core values impact teachers and scholars every day; Classical education; Classroom environment in a Classical/Charlotte Mason School. Academics & Teaching. Texas Academic standards (TEKS) and Classical Education integration.; What Is Academic excellence in a Classical School. The Power of Lesson Planning and preparation strategies; Lesson implementation and student engagement with outcomes aligned to standards; Best teaching practices including the power of Socratic seminars and Shared Inquiry (The Great Books Foundation). Curriculum resources found in Schoology and textbooks, usage and supplementation; Using Schoology LMS; Curriculum maps and pacing; LoTi Teacher Pop In Observation – What is Expected and What Does Success Look Like? NWEA – MAP, STAAR, 3<sup>rd</sup>, 5<sup>th</sup> and 8<sup>th</sup> Grade Testing ; Accessing MAP reports; Interpreting and implementing MAP results in the classroom ; The Cato Academy 8 Step plan for data analysis; Role of the AAC academic oversight committee. Assessments & Instruction: Scholar assessment data; Types of assessments – Exit Tickets – Grading Strategy; Benchmark Assessment (NWEA-MAP); Instructional decision-making based on data; Setting goals in relation to scholar learning and the standards; Developing and implementing action plans; Establishing objectives related to standards; Differentiated instruction; Instructional material/resources for differentiated instruction; Strategies for Gifted and Talented; ELL best practices in the traditional classroom



In addition to the 5-day orientation and in-service, teachers will attend professional development sessions throughout the year focused on Texas Standards, differentiation and classical education.

**Year Round Teacher Training and Evaluation Classical Education – Online Teacher Training Program.** Over 75 Professional Development courses have been developed in the Schoology Learning Management System. These courses range from particular tools and nuances of Classical Education, Charlotte Mason philosophies to practical examples of real-world teacher challenges in a Classical Education. The PD Course offerings are used to intentionally introduce new staff members to basic aspects of our culture and expectation. Once onboard, the PD Course offering is used to train a teacher on a theory or practical aspect of their profession. The Cato Academy PD department will observe an issue or coachable moment, assign the corresponding Virtual PD mini-course to the teacher and then follow up with the teacher to ensure understanding and implementation. A sampling of the courses offered includes: Relating with Parents; Relational Discipline Strategies (Dr. Druikers and Dr. Glasser); Narration and Recitation at various grade levels; Socratic Instruction - Intro, Level 1 and Level 2; Classroom Management; Understanding Classical Curriculum Resources; Data interpretation and grouping; Differentiation in the classroom

Staff will have an opportunity to progress in their careers at Cato Academy through attending in-person Professional Development classes and achieving mastery through various observations, one on one coaching and mentorship.

**Master Teacher Program – Beginning in Year 2 -OpportunityCulture.org –**

In year two of operations, Cato Academy intends to implement the Master Teacher program outlined in **OpportunityCulture.org**. The OpportunityCulture.org program was underwritten by the Bill and Melinda Gates Foundation and the Walton Fund among others. The driving mission of OpportunityCulture.org is to keep great teachers in the classroom but allow them to mentor other teachers at their grade level or at their school. The Cato Master Teachers are paid an additional stipend and have a lighter teaching load. Each grade level has a Master Teacher whose responsibility it is to mentor their team, disseminate information, analyze and correct teaching techniques and integrate the data-driven instruction protocols identified by the Administration and Professional Development staff.

Cato Academy intends to write grants starting in years two and three to expand the OpportunityCulture.org program. The focus of the grant would include the ability to expand the role of Master Teacher by utilizing technology that would allow the top Master Teachers in the Cato Academy network to mentor and coach all the teachers at a particular grade level. This technology would also allow for Master Teachers to lead virtual Socratic discussions all around the Country using a standard Google Hangout connection. The best teachers, mentoring and instructing at the highest level is the goals of the OpportunityCulture.org

The Superintendent of Cato Academy will present to the Governing Board a performance and incentive plan which complies with HB3 and designates high performing teachers as Master, Exemplary, or Recognized based on statewide performance descriptors for these designations. In the final policy, the teacher designation system must include teacher observation and the performance of a teacher's students. The Superintendent will detail how the chosen, LoTi teacher observation system and formal annual reviews using the Danielson Rubric and the teachers class STAAR results comply with the details of HB3.



**Tracking and Monitoring Teacher Performance:** Cato Academy will implement the LoTi Teacher Evaluation System, (Levels of Teaching Innovation), teacher evaluation and student engagement system. Through pop in observations and calibrated scoring by multiple admin team members, LoTi delivers consistency in teacher training and curriculum implementation. The LoTi observation and tracking platform allow the PD Team and the site Administration to score and observe teaching staff. The scoring metrics are consistent and measurable and allows the Cato Academy admin to identify issues and put in corrective actions. The target of no less than 10 LoTi pop-ins will be established for each teacher in a quarter.

To successfully implement and track a training program, their needs to be a common and measurable results-based analysis. LoTi delivers consistency in teacher training, curriculum implementation and classroom observations become critical. These scoring metrics are consistent and measurable and allows the site Administration to identify issues and put in additional training, more one on one coaching or corrective actions. LoTi was designed by Dr. Chris Moersch as a way to assess the most critical aspect of a scholar's education, a great teacher in the classroom. Dr. Moersch is the author of *Beyond Hardware: Using Existing Technology to Promote Higher Level Thinking*. Dr. Moersch has developed his program using the Danielson Rubric model which also incorporates a student engagement component known as H.E.A.T. (Higher order thinking, Engaged learning, Authentic connections, Technology use).

H.E.A.T is used as a lens to go beyond the lesson plan to what is actually happening with students. Many times the activities that the teacher plans do not result in the expected output from students. H.E.A.T. provides a common language to discuss and measure student output in a way that is tied to evidence-based practices.

LoTi involves teacher drop-in observations, real-time and engaging feedback from the PD. These tools and the feedback systems ensure that the teacher, Principal and PD team are speaking a common language of what is expected and what quality instruction looks like at the school. LoTi builds a map for teachers, coaches, and leaders to create successful collaborative learning environments. The LoTi program helps refine a teacher's skills and ensures a program of instruction is being followed and delivered at a high level.

All teachers will be required to post State aligned learning objectives for each of their lessons. These are available to the teachers inside the Schoology LMS in the form of 'I Can Statements' aligned to each core subject.

To ensure standard adherence, quality instruction, fidelity on curriculum Cato Academy will employ a series of overlapping systems to include; 1. Standards-aligned curriculum delivered via Schoology. 2. Lesson planning auditing and monitoring 3. Data assessment via NWEA-MAP testing. 4. Ongoing teacher evaluation and feedback using the LoTi teacher evaluation tool. This tool will be used by the administration and the PD team and cross-compared to each other. 5. Master Teacher or Lead Teacher support at particular subject areas or grade levels. 6. A comprehensive Professional Development department managed and delivered in person or through any of 75+ courses on individual teaching skills located in the Schoology LMS Library. 7. Administration training and board oversight of the Administrators role.

All teachers at the school will receive training on the LoTi observation tool and expectations for what the administration is looking for as mastery. The LoTi tool includes a teacher observation form that is filled out by the teacher after each pop in. The comparison of PD/Admin observation and teacher observation notes make an excellent starting point to coach teacher best practices.



### **Student Data - Intervention – Differentiation – RTI/MTSS Training**

Data informed instruction is a focus at Cato Academy. The data driven instruction becomes an identification tool to help with our differentiated instruction inside the classroom or as an intervention tool. The PD team and school administration will provide dedicated teacher training in the process and underlying philosophies related to student achievement.

Each teacher will follow a prescribed, 8 point plan for analyzing their student (NWEA-MAP) benchmark data. This process includes the teacher's strategy to address learning gaps, addressing of special populations and establish S.M.A.R.T. goals to achieve prior to the next NWEA Benchmark test. For all students, testing data will be analyzed and broken down by learning strand. A series of intervention programs will be employed to achieve maximum student growth. Differentiation will be a focus of the teacher training program as this is the first two tiers of an academic intervention strategy. Specific training on differentiation, small group and ways that a classroom can implement differentiation in their classroom will be provided to all teachers. Training on RTI/MTSS will be conducted including the theory and usage of the Hexagon Tool<sup>38</sup> as a framework to ensure a comprehensive RTI/MTSS program is best serving the needs of the students.

**Academic Accountability Committee:** The curriculum selection, curriculum training and fidelity of curriculum use in the classroom will be monitored by the school Principal. An Academic Accountability Committee (AAC) will be established and made up of the Principal, administration, master teachers, PD coach and ELL/Special Education team. The AAC will meet quarterly to review curriculum, data driven instruction (in particular the quarterly NWEA-MAP benchmark assessment data), teacher professional development strengths and weaknesses (using the LoTi teacher pop in scores explained in section 18 of this application) and recommend corrective actions in curriculum, pacing or professional development should the available data point to an issue. The school Principal will report to the Cato Governing Board the results, goals and progress after each quarterly NWEA benchmark assessment.

### **Retention**

Enter narrative response to the prompts in this section of the application.

**Teacher Retention and Stakeholder Satisfaction Measurement** Study after study points to the single biggest factor of student achievement being a strong teacher in the classroom. To that end, the goal of the Cato Academy governing board is to achieve 85% teacher retention by the third year of school operations. We are assuming years 1 and 2 will have higher turn over based on expectations of administration and the teaching staff. by year three. To achieve this objective a focused approach to teacher recruitment, hiring, training, and discipline are crucial. The governing board believes in the Robert Greenleaf, Servant Leadership Model<sup>39</sup> at every level. From Principal to Custodian, the focus on the school staff is to support scholars, families and each other. Establishing a strong culture will be critical to locating and retaining high quality staff. As part of the schools mission to; "... We strive to equip and train our teachers with academically excellent tools with the goal of instilling a lifelong love of learning in our scholars.", the Governing Board has adopted a budget which invests in professional

---

<sup>38</sup> Metz, A. & Louison, L. (2018) *The Hexagon Tool: Exploring Context*. Chapel Hill, NC: National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill. Based on Kiser, Zabel, Zachik, & Smith (2007) and Blase, Kiser & Van Dyke (2013).

<sup>39</sup> Greenleaf, R. K. (1991). *The servant as leader*. Indianapolis, IN: Robert K. Greenleaf Center.



development through a myriad of overlapping strategies. Starting with locating a Principal that can focus on academic goals while the Superintendent focuses on all the various operational functions, followed by dedicated Professional Development staff and on through to a weekly professional development scheduled time and master teachers who are paid a stipend to lead and mentor smaller groups of teachers. The Cato Academy PD implementation strategy will address and include: Continual and collaborative professional learning. An Academic Oversight Committee that meets quarterly and monitors benchmark and teacher observation data and takes corrective action as needed. Frequent Pop In Observations and Bi-Annual Formal Observations. Individualized coaching from administration and mentoring from a formalized Master teacher program (beginning in year 2). Weekly, school-based professional development workshops. Virtual Professional Development Library.

The areas that the leadership team can affect the most are the teachers working conditions, including supervision, operating procedures, co-workers, and communication. All these factors are research backed reasons teacher enjoy and remain at their schools.<sup>40</sup> An organized and comprehensive support program for newly certified elementary or secondary teachers could provide teachers with more personal and professional development, significantly increasing their job satisfaction and trend to stay in their profession.<sup>41</sup> The Cato Academy teacher retention and professional growth system looks to address these areas with the goal of 85% plus teacher retention.

The PD staff and lead teachers at Cato Academy work closely with the site Principal to ensure fidelity in curriculum delivery and content coverage. In combination, the training and content modules found in the Schoology Learning Management system help foster strategies to bring passion, student engagement, thematic units and deeper learning to every lesson.

Measuring culture and staff satisfaction will occur annually using the Net Promoter Score survey model. Staff and family surveys will be sent each year (in March-April) by the governing board to get candid feedback on how the school is performing. The surveys will focus on the Net Promoter Score concept was developed by (and is a registered trademark of) Satmetric It was introduced by Fred Reichheld in his 2003 Harvard Business Review article "One Number You Need to Grow"<sup>42</sup>. The Net Promoter Score (NPS) survey asks stakeholder which include staff and parents, *'On a scale of 1 to 10, would you refer our school to a friend?'* The idea of NPS is that every step of the employee or parent experience must be functioning well in order for a high score to be achieved for the entire school. From front desk, to clean floors to teachers in the classroom, to receive a high NPS score all portions of the school's operations must be functioning properly. If there is constant and focused effort on serving the teachers, families and scholars potential unsatisfactory leadership, teacher or staff performance can be identified quickly. If there is constant and focused effort on serving the teachers, families and scholars potential unsatisfactory leadership, teacher or staff performance can be identified quickly.

#### **Tracking and Monitoring Teacher Performance and Providing Feedback Loops:**

Cato Academy will implement the LoTi Teacher Evaluation System, (Levels of Teaching Innovation), teacher evaluation and student engagement system. Through pop in observations and calibrated scoring by multiple admin team members, LoTi delivers consistency in teacher training and curriculum implementation. The LoTi observation and tracking platform allow the

<sup>40</sup> Norton, M. Scott. (1999). Teacher retention: reducing costly teacher turnover. *Contemporary Education*, 70(3), 52-55

<sup>41</sup> McGlamory, S., & Edick, N. (2004). The Cadre project: A retention study. *The Delta Kappa Gamma Bulletin*, 71(1), 43-46.

<sup>42</sup> Reichheld, F.F. (2003) *The one number you need to grow*, *Harvard Business Review*, 82 (12)



PD Team and the site Administration to score and observe teaching staff. The scoring metrics are consistent and measurable and allows the Cato Academy admin to identify issues and put in corrective actions. The target of no less than 10 LoTi pop-ins will be established for each teacher in a quarter.

LoTi involves teacher drop-in observations, real-time and engaging feedback from the PD. These tools and the feedback systems ensure that the teacher, Principal and PD team are speaking a common language of what is expected and what quality instruction looks like at the school. LoTi builds a map for teachers, coaches, and leaders to create successful collaborative learning environments. The LoTi program helps refine a teacher's skills and ensures a program of instruction is being followed and delivered at a high level.

All teachers at the school will receive training on the LoTi observation tool and expectations for what the administration is looking for as mastery. The LoTi tool includes a teacher observation form that is filled out by the teacher after each pop in. The comparison of PD/Admin observation and teacher observation notes make an excellent starting point to coach teacher best practices.

## Operational and Financial Plans

### School Calendar and Schedule

Enter narrative response to the prompts in this section of the application. *Reference Attachments 25-26 in the response.*

The school calendar chosen by the Cato Governing Board aligns with the local school district, Pearland ISD. Their area a total of 183 days of instruction scheduled. Total minutes of instruction exceeds TEC, 42.005(i-K) of 75,600 minutes. For K-5 scholars, the total minutes of instruction will be 75,630 and for middle school, 6<sup>th</sup> to 8<sup>th</sup> grade, the minutes of instruction will be 76,560. The schedule includes days off coinciding with the Pearland ISD, which will allow families to plan vacations if they should have children in both schools.

The schedule includes a weekly early release to allow for teacher in service training. A proposed professional development schedule will be produced once the Principal and professional development staff are hired. A tentative plan for early release teacher in services will include a four week rotation with the following pattern; **1.** School wide PD course based on areas of teaching, curriculum and or Classical Education instructional areas that need school wide refinement. **2.** Principal lead training designed to build culture or work on policies areas related to the school. **3.** Grade band or subject level team break outs for planning and alignment of instruction across grades and disciplines. **4.** Teacher planning time to focus on individual areas that the teacher needs to work on.

**Scheduling theory for 1<sup>st</sup> to 5<sup>th</sup> Grade ELA:** The structure of the school day focuses on core classes of ELA and Math early in the day. In the ELA block Scholars will receive daily English instruction equal to no less than 135 minutes per day and 675 minutes per week. The ELA program requires three 45-minute segments. The segments involve (1) a daily interactive read-aloud with time for grammar and writing instruction. The text choices are above grade level and teachers will be trained to make these read alouds interactive. Additional time in this 45 minute block will be used for writing and learning grammar conventions, with the read aloud text as a guide. (2) a daily shared reading lesson involves students following along with the teacher



and word studies for difficult words found in the text, this segment involves partner reading as well and (3) small-group differentiated instruction occurs during the third 45 minute block. These blocks may be concurrent or a single final block may be added on the end of the day depending on the Principal's discretion. The final block is dedicated to small group differentiation and read aloud.

**Scheduling theory for 6<sup>th</sup> to 8<sup>th</sup> Grade ELA:** Core subject ELA instruction will take place in one of the 7 daily periods. A total of 265 minutes of ELA classroom periods are scheduled weekly. In the Cato Classical model, ELA skills are embedded across subjects with Science journaling, History writing projects and heavy emphasis on analysis of informational text in both subjects. The teachers in the history classes are aware of the novels being studied and look for ways to incorporate writing, verbal and research based skills into their lesson planning. Logic is introduced in 6<sup>th</sup> grade and continues through middle school. Latin instruction occurs is integral in middle school with vocabulary introduced in the ELA block, reinforced in during Latin instruction and purposefully reviewed in the Science block.

**Math Schedule** – Kinder to 8<sup>th</sup> Grade - Math is the second largest block scheduled for mornings with 60 minutes in K5 (300 minutes per week) and 55 minutes in 6<sup>th</sup> to 8<sup>th</sup> (275 minutes per week) each day of instruction per week. Within the math block instruction will be purposeful and spiral concepts from prior lessons with new concepts. This spiraling aspect spends the first part of the year (25% to 33% of the years total lessons) on prior knowledge and foundational concepts needed to master the current years concepts. The remainder of the year then slowly introduced from basic core concepts for the particular course to more advanced concepts. Prior standards are continually brought back in with the goal of building deeper understanding and mastery. Research also suggests there is value in a teaching method that uses small, easily digestible chunks of information within its lessons (Ausubel, 1969; Brophy & Everston, 1976). Studies by Rosenshine and Stevens (1986) and Brophy and Everston (1976) demonstrated the importance of using incremental steps when teaching new information. Effective concept development involves incremental skill instruction distributed throughout a school year.

The teachers will have a the TEKS math standards by grade and a number of resources (worksheets, powerpoints, real life math concept examples) to support their efforts. The school will provide iStation, Singapore Math and or Saxon Math textbooks as available resources for classroom teachers.

**Science and History Blocks** will occur daily in all grades. A total of 265 minutes of ELA classroom periods are scheduled weekly for 6<sup>th</sup> to 8<sup>th</sup> grade. A total of 255 minutes of history instruction per week and 170 minutes of science will occur in 1<sup>st</sup> to 5<sup>th</sup> . The scope and sequence in a Classical school, like Cato Academy, takes great care in programming in thematic units based primarily on the unit of history being studied. Science instruction will involve a full year emersion into Biology in 1<sup>st</sup> and 5<sup>th</sup> grade, Earth Sciences in 2<sup>nd</sup> and 6<sup>th</sup> grade, Chemistry in 3<sup>rd</sup> and 7<sup>th</sup> grade and Physics in 4<sup>th</sup> and 8<sup>th</sup> grade. The 40 week units for each subject are detailed for the teacher and built to TEKS science standards.

**History schedule rational;** History is the overall theme of all subjects in a Classical school such as Cato Academy. The schedule allocates 255 minutes per week in 1<sup>st</sup> to 5<sup>th</sup> and 265 minutes per week in 6<sup>th</sup> to 8<sup>th</sup> for dedicated history instruction. But history continues to be taught in ELA, Science, Art/Music and to a limited sense Math classes. Students are immersed in a time period for a full year at a time. 1<sup>st</sup> grade and 5<sup>th</sup> grade study the arts, literature, science



applications and civilizations of the ancients (from Mesopotamia to the fall of Rome), 2<sup>nd</sup> and 6<sup>th</sup>, the Middle Ages (from the Dark Ages to the Enlightenment and Discovery), 3<sup>rd</sup> and 6<sup>th</sup> focus on the founding and structure of America. 4<sup>th</sup> and 8<sup>th</sup> cover the Civil war to 9/11. Within the History curriculum offerings are unit based Socratic discussion prompts, writing assignment options, informational text, source documents, powerpoints, picture study, great men and women of history, economic add ons, and geography lessons.

The history offerings found in our curriculum mapping are built-out using TEKS standards and utilize the **S.P.R.I.T.E. Model**. Under this buffet of curriculum resources, the teacher can choose one or more aspects of a particular month-long unit. The flexibility for the teacher to focus on the **SOCIETY** (what it was like for children, nobility or others in a time period), **POLITICS** (how the civilization was governed and ruled), **RELIGION** (what doctrine a community followed, when the great religions started and how they impacted society), **INTELLECTUAL** (what were the great ideas, the impacts of art, architecture and music), **TECHNOLOGY** (what advancements came into existence and how these changes impacted history), **ECONOMY** (how did the society trade, build, grow or make the goods and services they needed). The **S.P.R.I.T.E.** Model of history lesson planning allows the teacher to match their interest with their students curiosity to deliver impactful lessons.

**Art – Music – Physical Ed -** Specials are an important part of the students schedule. Each day the students will rotate with one class in either art, music, physical education. With the rotation, students will experience two Art/Music/Phys Ed classes per week one week then one the second week. With 210 minutes per week dedicated to specials, scholars get a full experience of theory and practice in each of the three subjects.

### Student Recruitment and Enrollment

Enter narrative response to the prompts in this section of the application. *Reference Attachment 27 in the response.*

Cato Classical Academy will target all students within Pearland ISD, Alvin ISD and south Houston ISD who desire a content-rich, rigorous, and time-tested learning curriculum in an atmosphere that promotes and builds the strength of character. The Cato Academy Governing Board is proposing one campus to be located in North East Pearland with easy access from Alvin and south Houston. With an identified property near the intersection of Highway 288 and the Sam Houston Toll way, the ease of access for families in a 5 to 7 mile radius will be a unique feature when choosing the school.

The Governing Board is proposing one school with measured enrollment projections. They feel that starting with a single campus allows the school culture and norms to be set in a measured process. The power of the school rests on the power of relationships. These student to teacher, teacher to family relationships take time to demonstrate and form. The financing and construction plan allows for slow ramp up and flexibility to meet strong or measured enrollment projections.

|   | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|---|--------|--------|--------|--------|--------|
| K | 52     | 72     | 72     | 72     | 72     |



|              |     |     |     |     |     |
|--------------|-----|-----|-----|-----|-----|
| <b>1</b>     | 52  | 72  | 72  | 78  | 78  |
| <b>2</b>     | 52  | 65  | 75  | 78  | 78  |
| <b>3</b>     | 52  | 60  | 75  | 78  | 78  |
| <b>4</b>     | 35  | 60  | 75  | 78  | 78  |
| <b>5</b>     | 36  | 52  | 75  | 78  | 78  |
| <b>6</b>     | 26  | 52  | 75  | 78  | 78  |
| <b>7</b>     |     | 52  | 65  | 78  | 78  |
| <b>8</b>     |     |     | 65  | 78  | 78  |
| <b>TOTAL</b> | 306 | 485 | 649 | 696 | 696 |

The rationale for the enrollment strategy is based on the following points from researching the proposed site area.

1. There are very few if any public school choices for the families of the proposed school.
2. The focus on academic rigor and social emotional learning found in the Classical Education model matches the unique aspects of the area.
3. The blending of a public K8 charter with an ESA funded special education school will become a model for inclusion for both schools. The founding team's experience in the Pearland area and with special needs populations in the area are strong resources to leverage for the schools success.
5. The Governing board is proposing a slow ramp up and growth in enrollment and is being conservative in their estimates for the first three years.
6. Cato Academy has reached out to a number of new Classical Education charter schools reviewed their enrollment objectives and actual scholars on the first day. The pattern has been stronger enrollment in the K-4 grades and slower enrollment in the 5<sup>th</sup>, 6<sup>th</sup> grade levels. It was noted that families do not typically like to enroll in a new school for the middle school grades.
7. The region is growing rapidly with a ballooning from 125,198 to an additional 50% growth or 60,000 residents by 2040. As parents come to the region, choices in schools will become an important draw to the region.

**MARKETING and OUTREACH PLAN:** The marketing focus will be on families in the geographic area with that have scholars between 4 and 11 years old. With social media targeting, this demographic can be easily targeted. The outreach in the community will focus on area churches, pre-schools, and youth clubs. Cato's plan is to open a school with grades K-8. To enroll in the school Kindergarten students must have reached age 5 by September 1st in accordance with Texas TEA rules. Cato Academy will comply with all state and federal laws, which prohibit discrimination on the basis of race, gender, ethnicity, national or ethnic origin, or disability in the admission of students. Cato Academy's students will include students who



**PROPRIETARY MATERIAL**

3 pages have been withheld

**PLEASE NOTE: The responsive information contains proprietary information that can only be made available to you for viewing in person. Because the information indicates that it is proprietary, you may review this information in person during normal business hours at TEA. If you are interested in reviewing the proprietary information, please send an email to [CharterSchools@tea.texas.gov](mailto:CharterSchools@tea.texas.gov) to schedule an appointment.**



A guaranteed maximum contract will be negotiated with the help of the funding partner, Schoolhouse Development has funded over 60 charter campuses around the US and brings experience and guidance to the project. The campus will have programmatic elements unique to Classical education including dedicated music and art facilities. The campus will have a full-size gymnasium and theater/coral stage, a cafeteria and specially designed Special Education rooms with smaller breakouts for individualized professional service. The inclusion of athletics, arts, music and special education facility space is in alignment with the schools mission to provide a complete Classical Education to the scholars that enroll.

In the event of an unforeseen issue that would affect the school opening, the Principal and Business Manager would begin reaching out to local area churches, exhibition halls or other large facilities to accommodate the student population. There are a number of rental facilities in the areas that could accommodate the needs of the school during the first year of operations. These include, a number of churches, the Knights of Columbus, VFW and potential empty retail stores.

[REDACTED]

### Facility Not Identified

|   |
|---|
| 1. Does the applicant intend to lease or purchase a property?               |
| Lease <input type="checkbox"/> Purchase <input checked="" type="checkbox"/> |

Enter narrative response to the prompts in this section of the application (if applicable).



## Transportation

Enter narrative response to the prompts in this section of the application.

Cato Classical Academy will not be providing transportation for students on a daily basis. We will accommodate any IEP or special needs requests from enrolled students. The school administration will work with the PTO to develop a ride sharing program to help parents who need additional support in the area of transportation to and from school.

## Start-up Plan

Enter narrative response to the prompts in this section of the application. *Reference Attachment 30 in the response.*

Cato Academy has established a working relationship with Schoolhouse Development. Schoolhouse will serve as a facility developer and financier for the Cato Academy school. Schoolhouse Development will provide the start-up funds necessary to cover the expenses that will occur in the start-up process before the state equalization revenue is received. A letter from Schoolhouse Development has been enclosed noting the amount of the Start Up funds budgeted in the amount of \$400,000.

Terms of this loan are included in the overall development financing loan from Performance Charter Development (see Schoolhouse Development letter of intent to finance.)

The Start-Up Budget describing the budgeted start-up costs as follows:

|  |           |
|--|-----------|
| Administration/Instruction/Support       |           |
| Principal                                | \$ 28,000 |
| Clerical                                 | \$ 14,000 |
| Office supplies                          | \$ 36,400 |
| Curriculum & Resource Materials          | \$148,985 |
| Total Administration/Instruction/Support | \$227,385 |
| Operations & Maintenance                 |           |
| Marketing                                | \$70,000  |
| Student Technology Equipment             | \$59,119  |
| Office Technology Equipment              | \$25,887  |
| Total Operations & Maintenance           | \$155,006 |
| Total Expenditures                       | \$382,391 |
| Contingency Fees                         | \$ 17,609 |
| Total Start Up Expenditures              | \$400,000 |

### Start-Up Budget Assumptions

#### *Revenue Assumptions*

- Schoolhouse Development will provide the start-up funds necessary to cover the expenses that will occur in the start-up process before the state equalization revenue is received. A letter from Schoolhouse has been enclosed noting the amount of the Start Up funds budgeted in the amount of \$400,000.

#### *Expenditure Assumptions*



- Director/Principal- Cato Academy will hire a Principal three (3) months in advance of school opening. Salary expense calculated as 25% of \$80,000 (plus benefits) annual salary or \$28,000.
- Clerical Staff- Cato Academy will hire clerical staff three (3) months in advance of school opening. Salary expense calculated as 25% of \$40,000 (plus benefits) annual salary or \$14,000.
- Office Supplies- Cato Academy will purchase 50% of its Equipment and Supplies budget to effectively register students and operate the functions of high school prior to opening day, total \$36,400 as described below:
 

|                               |   |
|-------------------------------|---|
| Copiers                       | \$12,000  |
| Office Start Up               | \$ 8,500  |
| Teacher Supplies              | \$12,400  |
| <u>Raptor Security System</u> | <u>\$ 3,500</u> ( <i>Drivers License Check for visitors on campus</i> ) |
| Total                         | \$36,400  |
- Marketing- Cato Academy has budgeted year zero marketing cost prior to opening day, total \$70,000 per Marketing Budget. This amount represents only the amount to be paid from start-up funds and is budgeted and to be paid for from capital funding for the overall development cost of the school facility. Overall facility sources and uses of funds included in this application.
- Office Technology Equipment- Cato Academy will purchase \$25,887 of the office technology budget prior to opening day. This amount represents only the amount to be paid from start-up funds and it is in addition to the FFE budget to be paid for from capital funding for the overall development cost of the school facility.
 

|                   |            |                   |
|-------------------|------------|-------------------|
| Documents Cameras | \$289 x 20 | = \$ 5,780        |
| Servers           |            | = \$12,500        |
| <u>Firewall</u>   |            | <u>= \$ 7,607</u> |
| Total             |            | \$25,887          |
- Student Technology Equipment- Cato Academy will purchase \$59,119 of the student technology budget prior to opening day. This amount represents only the amount to be paid from start-up funds and it is in addition to the FFE budget to be paid for from capital funding for the overall development cost of the school facility.
 

|                            |                         |                   |
|----------------------------|-------------------------|-------------------|
| Staff Chromebooks          | \$349 each * 22         | = \$9,319         |
| <u>Student Chromebooks</u> | <u>\$249 each * 200</u> | <u>= \$49,800</u> |
| Total                      |                         | \$59,119          |
- Curriculum & Resource Materials- Cato Academy will purchase curriculum materials and equipment prior to opening day, total, \$148,985 to include teacher and student resources for Math, ELA, Science, History, Logic, Latin, art supplies, music start up supplies and physical education start up items.
- All operations and maintenance will be reflected in Year 1 budget. Contracted services including HR, accounting/audit, landscaping, janitorial will be reflected in the Year 1 budget.

The Cato Academy Governing Board has delegated the development and operations to its Superintendent, Mr. Joe Higgins. Mr. Higgins has previously worked with School House Development and other finance/developer groups (Building Hope, Performance Charter are other funding options on this project). In his prior position as CEO of an Arizona/Colorado group, Mr. Higgins successfully developed \$80m in charter school projects under 14 separate contracts. He will work with the site Principal and business office staffs to ensure systems are in place, budgets are monitored and initial and ongoing operations are addressed. Mr. Higgins has a long and successful history in marketing and branding, operations of complex entities, regulatory issues with local municipalities. He has a number of vendors which uniquely understand the needs of a public charter school and will be presenting to the board options for all the above start up items. He is being employed by Forgotten Angels Foundation to



build and manage the school on behalf of the Cato Academy Governing Board. The Superintendent – Principal model is explain in detail in this application. Mr. Higgins will be responsible for all aspect of school finance, operations and HR. The school Principal will be responsible for all aspects of academics, professional development and culture/community building.

Since Mr. Higgins is a new member of the Pearland community, he will rely heavily on Renee McGuire during the construction and development stage. Her 40+ year in real estate development in and around the Pearland area will be invaluable in navigating any potential pitfalls. Board member, Jignesh Derasari will work closely with Mr. Higgins and Mrs. McGuire to ensure the project is on track and on budget.

The Principal and office manager are budgeted to be hired in May of 2021. Budgets reflect salary and benefits for their initial salary to be incurred during Year 0.

Beginning in December of 2020 our marketing buys will start to ramp up as described in the marketing plan. Our enrollment lottery will go live in January of 2021 and the lottery list will start. All prior interest lists will notified of the lottery. These lists have been communicated with and invited to all the events that the school has planned monthly. The idea is to get excitement building around the school and the word of mouth of our efforts to grow.

The applications to enroll will be in both Spanish and English. Once a family enrolls, an electronic communication is generated and our leadership team will reach out via phone and invite the family to any community events we have planned in the near future. The deadline to apply in the lottery will be April 1, 2021. The actual lottery will take place on April 6<sup>th</sup>, 2021. Based on our enrollment goals, we will reserve 78 seats in each grade up to 6<sup>th</sup> grade in year one. Siblings will receive preference per Texas enrollment guidelines. Families will be notified by US Mail, phone and email within 24 hours of the close of the lottery. Once notified the family will have 10 days to respond and accept the position in the school. If a family declines, or does not respond within 10 days we will continue to go down the enrollment list and enroll in order of the lottery draw.

After the initial reenrollment lottery, we will continue to communicate with our enrolled families and look for opportunities to bring the new families together to meet other families, school leadership and their teachers. We will encourage all families to plug in to our social media efforts as a way to share ideas and keep engaged. Our Registrar will reach out for various enrollment documents we may need and the goal from April to school opening it to keep heavy communication with our parents.

Beginning in June, we will hold an open house, at the campus if it is completed or at a convenient location as one more way to connect, inform, solicit feedback and bring our community together.

We will set targets for early, lottery and summer to ensure that we are achieving our enrollment goals. By January of 2021 we are setting a goal of 225 intents to enroll scholars. With the start of our marketing and the outreach from our leadership team, by the lottery (April 1<sup>st</sup>) we have a goal of 375 intents to enroll. Post lottery and before summer, we look to have a wait list in the grades K3 and be at our enrollment targets for 4<sup>th</sup> to 6<sup>th</sup>.

The Superintendent, Principal and Business manage will hold weekly meetings beginning in April/May depending on their hire dates to review enrollments and ensure targets are on track.



## Financial Planning

|  |  |
|--|--|
| 1. Identify the fiscal year for the <b>sponsoring entity</b> .       |  |
| July 1-June 30 x   | September 1-August 31 <input type="checkbox"/> |
| 2. Identify the fiscal year for the proposed <b>charter school</b> . |  |
| July 1-June 30 x   | September 1-August 31 <input type="checkbox"/> |

Enter narrative response to the prompts in this section of the application. *Reference Attachments 31-37 in the response.*

The Cato Academy Governing Board will establish board policies processes the school will use for financial planning, accounting, purchasing, and payroll. The expertise of the Governing board in these areas will be instrumental in policy formation. In addition to the first year board training, the Governing Board will seek outside expertise from TEA, the Texas Charter School Association and allied professionals with a background and expertise in charter school management.

As part of the development of the policies and procedure policy, the following framework will be part of the finished manual:

- Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts.
- All documentation related to financial matters will be completed by computer, word processor, typewriter, or ink.
- The Governance Council can appoint someone else to perform the Superintendent's responsibilities in the case of absence.
- Establishment of a Purchasing Policy - The Superintendent may authorize expenditures and may sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000.
- Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, asset management are all policies that will be established by the Governing Board and executed by the Superintendent.
- Petty Cash and Credit Card Use Policy will be established using framework that is generally acceptable to Charter School cash handling procedures.
- Contracts. Consideration will be made of in-house capabilities to accomplish services before contracting for them. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the school. ) Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e.



consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Superintendent will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Superintendent will be responsible for ensuring the terms of the contracts are fulfilled. Potential conflicts of interest will be disclosed upfront, and the Superintendent and/or Member(s) of the Governance Council with the conflict will excuse themselves from discussions and from voting on the contract.<sup>43</sup>

The Governing Board will commission an annual financial audit by an independent third party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to the charter-granting agency. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to:

- a. An audit of the accuracy of the financial statements
- b. An audit of the attendance accounting and revenue accuracy practices
- c. An audit of the internal control practices

Annual Financial Compliance Report. Each year Cato Academy will prepare its annual financial statements which will be part of the annual audit from an outside CPA firm. These statements will be sent to TEA for review and count towards the schools Charter FIRST (School Financial Integrity Rating System of Texas) ratings. The due date, giving the schools June 30 fiscal close will be due to TEA on or before November 27<sup>th</sup> or no later than 150 days after the fiscal year end. The prepared annual financial statements and audited financials will first be approved by the Cato Academy Governing Board with signed documentation that the board has approved the statements. All financial audits and adopted budgets will be posted on the schools website for public preview.

---

<sup>43</sup> National Charter School Resource Center





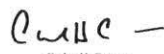

# Attachments

## Attachment 1: Articles of Incorporation

Provide the original Articles of Incorporation filed with the Texas Secretary of State, or the state of incorporation (and any restated Articles of Incorporation and Articles of Amendment). If the sponsoring entity was incorporated after January 1, 2006, submit the Certificate of Formation and the Certificate of Filing in place of the Articles of Incorporation. All forms submitted to the state must be dated prior to **January 21, 2020**.

### Texas Certificate of Filing

### Texas Certificate of Formation

|  |   |
|--|---|
| <div><div>Corporations Section<br/>P.O. Box 13697<br/>Austin, Texas 78711-3697</div><div><div>Carlos H. Cascos<br/>Secretary of State</div></div><div><div>Office of the Secretary of State</div><div>CERTIFICATE OF FILING<br/>OF</div><div>File Number: _____</div></div><p>The undersigned, as Secretary of State of Texas, hereby certifies that an Application for Registration for the above named Foreign Nonprofit Corporation to transact business in this State has been received in this office and has been found to conform to the applicable provisions of law.</p><p>ACCORDINGLY, the undersigned, as Secretary of State, and by virtue of the authority vested in the secretary by law, hereby issues this certificate evidencing the authority of the entity to transact business in this State from and after the effective date shown below for the purpose or purposes set forth in the application under the name of _____.</p><p>The issuance of this certificate does not authorize the use of a 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.</p><p>Dated: 07/24/2015<br/>Effective: 07/24/2015</p><div><div><div>Carlos H. Cascos<br/>Secretary of State</div></div></div><div><div>Phone: (512) 463-5555<br/>Prepared by: Debbie Gustafson</div><div>Visit us on the Internet at <a href="http://www.sos.state.tx.us">http://www.sos.state.tx.us</a><br/>Fax: (512) 463-5709<br/>TDD: _____</div><div>Dial: 7-1-1 for Relay Services<br/>Document: _____</div></div></div> | <div><div>Form 202<br/>(Revised 05/11)</div><div>Submit in duplicate to:<br/>Secretary of State<br/>P.O. Box 13697<br/>Austin, TX 78711-3697<br/>512 463-5555<br/>FAX: 512 463-5709<br/>Filing Fee: \$25</div><div><div>Certificate of Formation<br/>Nonprofit Corporation</div></div><div>_____</div><div>Article 1 – Entity Name and Type</div><p>The filing entity being formed is a nonprofit corporation. The name of the entity is: _____</p><div>Article 2 – Registered Agent and Registered Office<br/>(See instructions. Select and complete either A or B and complete C.)</div><p><input type="checkbox"/> A. The initial registered agent is an organization (cannot be entity named above) by the name of _____</p><p>OR</p><p>_____</p></div> |
|--|---|



Corporations Section  
P.O. Box 13697  
Austin, Texas 78711-3697



Ruth R. Hughs  
Secretary of State

## Office of the Secretary of State

### CERTIFICATE OF FILING OF

Classical Charter Schools of Texas, Inc.  
803518745

The undersigned, as Secretary of State of Texas, hereby certifies that a Restated Certificate of Formation for the above named domestic nonprofit corporation has been received in this office and has been found to conform to the applicable provisions of law.

ACCORDINGLY, the undersigned, as Secretary of State, and by virtue of the authority vested in the secretary by law, hereby issues this certificate evidencing filing effective on the date shown below.

Dated: 01/15/2020

Effective: 01/15/2020



A handwritten signature in black ink, appearing to read "Ruth R. Hughs".

Ruth R. Hughs  
Secretary of State



FILED  
In the Office of the  
Secretary of State of Texas

JAN 15 2020

AMENDED AND RESTATED  
CERTIFICATE OF FORMATION  
OF  
CLASSICAL CHARTER SCHOOLS OF TEXAS, INC.

Corporations Section

1. Classical Charter Schools of Texas, Inc., a Texas nonprofit corporation (the "Corporation"), pursuant to the provisions of Sections 22.105 to 22.108 of the Texas Business Organizations Code, hereby adopts this Amended and Restated Certificate of Formation which accurately copies the Certificate of Formation as amended by such Amended and Restated Certificate of Formation as hereinafter set forth.

2. The Certificate of Formation of the Corporation is amended and restated in its entirety by this Amended and Restated Certificate of Formation, as summarized below:

Article III, Directors, has been amended.

Article VII, the Organizer, has been removed.

Articles VIII-XII have been renumbered accordingly.

3. Each such amendment made by this Amended and Restated Certificate of Formation has been effected in conformity with the provisions of the Texas Business Organizations Code and the Corporation's governing documents and was duly adopted by unanimous written consent of the directors of the Corporation.

4. The Amended and Restated Certificate of Formation of the Corporation accurately states the text of the Certificate of Formation being restated and each amendment to the Certificate of Formation being restated that is in effect, and as further amended by the Amended and Restated Certificate of Formation. The attached Amended and Restated Certificate of Formation does not contain any other change in the Certificate of Formation being restated except for the information permitted to be omitted by the provisions of the Texas Business Organizations Code applicable to the filing entity.

*[remainder of this page intentionally left blank]*



**AMENDED AND RESTATED  
CERTIFICATE OF FORMATION  
OF  
CLASSICAL CHARTER SCHOOLS OF TEXAS, INC.**

The undersigned natural person, of the age of eighteen (18) years or more, acting as organizer of a Corporation under the Texas Business Organizations Code, adopts the following Certificate of Formation.

**ARTICLE I**

The name of the corporation is Classical Charter Schools of Texas, Inc. The filing entity being formed is a non-profit corporation. The period of its duration is perpetual.

**ARTICLE II**

The business address of the registered office of the corporation is 7918 Broadway Street, #106, Pearland Texas 77581 and the name of its registered agent at such address is Renee McGuire.

**ARTICLE III**

The number of directors of the Corporation, which shall constitute its Board of Directors, and the governing body of the Corporation, shall be fixed by or as provided in the Bylaws of the Corporation. The number of directors shall be no fewer than three. The current Directors are:

Dr. Nicolas Ellen  
7918 Broadway Street #106  
Pearland, Texas 77581

Renee McGuire  
7918 Broadway Street #106  
Pearland, Texas 77581

Jill Shockley  
7918 Broadway Street #106  
Pearland, Texas 77581

Jignesh Derasari  
7918 Broadway Street #106  
Pearland, Texas 77581

**ARTICLE IV**

The Corporation shall have no members.

**ARTICLE V**

The Corporation is organized exclusively for charitable and educational purposes, including for such purposes as the making of distributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provision of any future federal tax code. In particular, the Corporation



is organized to educate, train and prepare individuals to function well in society and to provide educational opportunities and experiences.

The Corporation is organized to have and exercise all rights and powers conferred upon non-profit corporations under the laws of the State of Texas, or which may hereafter be so conferred, in order to promote charitable and educational activities.

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its officers, directors or other private persons, except that the Corporation, in accordance with applicable law, shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes of the Corporation set forth in these Articles herein. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements), any political campaign on behalf of or in opposition to any candidate for public office.

Notwithstanding any other provision hereof, the Corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provision of any future federal tax code, or (b) by any corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986, or the corresponding provision of any future federal tax code.

#### ARTICLE VI

All money and other assets owned or controlled by the Corporation, wherever derived, shall be devoted for use in performing the charitable and educational functions of the Corporation solely through the furthering of the primary purposes of the Corporation.

Except as otherwise required by applicable state or federal law, upon dissolution or liquidation of this Corporation, and after payment of all debts and satisfaction of all liabilities and obligations of the Corporation (or making adequate provision therefore), and after the return, transfer, or conveyance of all assets requiring return, transfer, or conveyance thereof because of the dissolution or liquidation of the Corporation, any remaining assets of this Corporation shall be distributed to charitable or educational organizations that would then qualify as an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provision of any future federal tax code, as determined by the Board of Directors of the Corporation.

#### ARTICLE VII

This Certificate shall be effective on the date filed with the Secretary of State of Texas.



#### ARTICLE VIII

The initial Bylaws of the Corporation shall be adopted by its Board of Directors, and the power to alter, amend or repeal the Bylaws or adopt new Bylaws shall be vested in its Board of Directors.

#### ARTICLE IX

To the fullest extent permitted by applicable law, a director of this Corporation shall not be liable to the Corporation for monetary damages for an act or omission in the director's capacity as a director, except that this Article does not eliminate or limit the liability of a director to the extent the director is found to be liable for:

- (a) a breach of a director's duty of loyalty to the Corporation;
- (b) an act or omission not in good faith that constitutes a breach of duty of the director to the Corporation or an act or omission that involves intentional misconduct or a knowing violation of the law;
- (c) a transaction from which the director received an improper benefit, whether or not the benefit resulted from an action taken within the scope of the director's office; or
- (d) an act or omission for which the liability of a director is expressly provided by applicable law.

#### ARTICLE X

The Corporation shall indemnify any person who (i) is or was a director, officer, employee, or agent of the Corporation, or (ii) while a director, officer, employee, or agent of the Corporation, is or was serving at the request of the Corporation as a director, officer, trustee, employee, agent, or similar functionary of another foreign or domestic non-profit corporation, trust, employee benefit plan, or other enterprise, to the fullest extent that a corporation may or is required to grant indemnification to a director under the Texas Business Organizations Code as now written or as hereafter amended, but only to the extent permitted for (a) a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provision of any future federal tax code, and (b) a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1986, or the corresponding provision of any future federal tax code.



**ARTICLE XI**

Except as otherwise provided in the Bylaws of the Corporation, this Certificate of Formation may be altered, amended, or repealed only as provided in the Texas Business Organizations Code, as presently written or hereafter amended.

Dated: January 15, 2020

**Classical Charter Schools of Texas, Inc.**

By: /s/ Renee McGuire  
Renee McGuire, Director



## **Attachment 2: 501(c)(3) Determination Letter**

Provide the 501(c)(3) Determination Letter issued by the Internal Revenue Service (IRS) or evidence of filing for tax exempt status with the IRS.

If the applicant does not have the 501(c)(3) Determination Letter at the time of application submission, at a minimum, provide documentation to demonstrate that an IRS Form 1023 was submitted by **January 21, 2020**.

*Note:* Applicants submitting proof of filing with the IRS must provide to the TEA the 501(c)(3) Determination Letter issued by the IRS granting the entity nonprofit status, no later than **May 15, 2020**, in order to be deemed an eligible entity and scheduled for an applicant capacity interview. Failure to submit the Determination Letter will result in the applicant being removed from the application process without the opportunity to interview.



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

DEPARTMENT OF THE TREASURY

Date: **FEB 11 2020**

CLASSICAL CHARTER SCHOOLS OF TEXAS  
INC  
C/O JOSEPH E HOFFER  
845 PROTON ROAD  
SAN ANTONIO, TX 78528

Employer Identification Number:  
84-4309022  
DLN:  
29053029323030  
Contact Person:  
DENNIS C GRUESSER ID# 31992  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(ii)  
Form 990/990-EZ/990-N Required:  
Yes  
Effective Date of Exemption:  
January 15, 2020  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

You're not subject to the specific publishing requirements of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you operate under a contract with the local government. If your method of operation changes to the extent that your charter is not approved, terminated, cancelled or not renewed, you should notify us. You'll also be required to comply with Revenue Procedure 75-50.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt



CLASSICAL CHARTER SCHOOLS OF TEXAS

organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

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

Sincerely,

A handwritten signature in black ink that reads "Stephen A. Martin". The signature is written in a cursive style with a large, stylized 'S' at the beginning.

Director, Exempt Organizations  
Rulings and Agreements

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

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form1023](http://www.irs.gov/Form1023) for instructions and the latest information.

OMB No. 1545-0056

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

Use the instructions to complete this application and for a definition of all **bold** items. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500. Visit our website at [www.irs.gov](http://www.irs.gov) for forms and publications. If the required information and documents are not submitted with payment of the appropriate user fee, the application may be returned to you.

Attach additional sheets to this application if you need more space to answer fully. Put your name and EIN on each sheet and identify each answer by Part and line number. Complete Parts I – XI of Form 1023 and submit only those Schedules (A through H) that apply to you.

**Part I Identification of Applicant**

|   |            |   |  |
|---|------------|---|--|
| <b>1</b> Full name of organization (exactly as it appears in your organizing document)  |            | <b>2</b> c/o Name (if applicable)                                   |  |
| Classical Charter Schools of Texas, Inc.  |            |   |  |
| <b>3</b> Mailing address (Number and street) (see instructions)   | Room/Suite | <b>4</b> Employer Identification Number (EIN)                       |  |
| 7918 Broadway Street  | #106       | 84-4309022  |  |
| City or town, state or country, and ZIP + 4   |            | <b>5</b> Month the annual accounting period ends (01 – 12)          |  |
| Pearland, Texas 77581   |            | 06  |  |
| <b>6</b> Primary contact (officer, director, trustee, or authorized representative)<br><b>a</b> Name:   |            | <b>b</b> Phone: 520-631-7400  |  |
| Joe Higgins, CEO  |            | <b>c</b> Fax: (optional)  |  |
| <b>7</b> Are you represented by an authorized representative, such as an attorney or accountant? If "Yes," provide the authorized representative's name, and the name and address of the authorized representative's firm. Include a completed Form 2848, <i>Power of Attorney and Declaration of Representative</i> , with your application if you would like us to communicate with your representative.  |            | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |  |
| <b>8</b> Was a person who is not one of your officers, directors, trustees, employees, or an authorized representative listed in line 7, paid, or promised payment, to help plan, manage, or advise you about the structure or activities of your organization, or about your financial or tax matters? If "Yes," provide the person's name, the name and address of the person's firm, the amounts paid or promised to be paid, and describe that person's role. |            | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |  |
| <b>9a</b> Organization's website: N/A   |            |   |  |
| <b>b</b> Organization's email: (optional) N/A   |            |   |  |
| <b>10</b> Certain organizations are not required to file an information return (Form 990 or Form 990-EZ). If you are granted tax-exemption, are you claiming to be excused from filing Form 990 or Form 990-EZ? If "Yes," explain. See the instructions for a description of organizations not required to file Form 990 or Form 990-EZ.  |            | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |  |
| <b>11</b> Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY)  |            | 01 / 14 / 2020  |  |
| <b>12</b> Were you formed under the laws of a foreign country?<br>If "Yes," state the country.  |            | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |  |



**Part II Organizational Structure**

You must be a corporation (including a limited liability company), an unincorporated association, or a trust to be tax exempt. See instructions. **DO NOT file this form unless you can check "Yes" on lines 1, 2, 3, or 4.**

- 1** Are you a **corporation**? If "Yes," attach a copy of your articles of incorporation showing **certification of filing** with the appropriate state agency. Include copies of any amendments to your articles and be sure they also show state filing certification. ☒ **Yes** ☐ **No**
- 2** Are you a **limited liability company (LLC)**? If "Yes," attach a copy of your articles of organization showing **certification of filing** with the appropriate state agency. Also, if you adopted an operating agreement, attach a copy. Include copies of any amendments to your articles and be sure they show state filing certification. Refer to the instructions for circumstances when an LLC should not file its own exemption application. ☐ **Yes** ☒ **No**
- 3** Are you an **unincorporated association**? If "Yes," attach a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments. ☐ **Yes** ☒ **No**
- 4a** Are you a **trust**? If "Yes," attach a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments. ☐ **Yes** ☒ **No**
- b** Have you been funded? If "No," explain how you are formed without anything of value placed in trust. ☐ **Yes** ☒ **No**
- 5** Have you adopted **bylaws**? If "Yes," attach a current copy showing date of adoption. If "No," explain how your officers, directors, or trustees are selected. ☒ **Yes** ☐ **No**

**Part III Required Provisions in Your Organizing Document**

The following questions are designed to ensure that when you file this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3). Unless you can check the boxes in both lines 1 and 2, your organizing document does not meet the organizational test. **DO NOT file this application until you have amended your organizing document.** Submit your original and amended organizing documents (showing state filing certification if you are a corporation or an LLC) with your application.

- 1** Section 501(c)(3) requires that your organizing document state your exempt purpose(s), such as charitable, religious, educational, and/or scientific purposes. Check the box to confirm that your organizing document meets this requirement. Describe specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document. Refer to the instructions for exempt purpose language. ☒
- Location of Purpose Clause (Page, Article, and Paragraph): **Page 2, Article V, Para. 1**
- 2a** Section 501(c)(3) requires that upon dissolution of your organization, your remaining assets must be used exclusively for exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Check the box on line 2a to confirm that your organizing document meets this requirement by express provision for the distribution of assets upon dissolution. If you rely on state law for your dissolution provision, do not check the box on line 2a and go to line 2c. ☒
- b** If you checked the box on line 2a, specify the location of your dissolution clause (Page, Article, and Paragraph). Do not complete line 2c if you checked box 2a. **Page 2, Article VI, Para. 2**
- c** See the instructions for information about the operation of state law in your particular state. Check this box if you rely on operation of state law for your dissolution provision and indicate the state: ☐

**Part IV Narrative Description of Your Activities**

Using an attachment, describe your *past*, *present*, and *planned* activities in a narrative. If you believe that you have already provided some of this information in response to other parts of this application, you may summarize that information here and refer to the specific parts of the application for supporting details. You may also attach representative copies of newsletters, brochures, or similar documents for supporting details to this narrative. Remember that if this application is approved, it will be open for public inspection. Therefore, your narrative description of activities should be thorough and accurate. Refer to the instructions for information that must be included in your description.

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors**

- 1a** List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual **compensation**, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

| Name                     | Title           | Mailing address  | Compensation amount<br>(annual actual or estimated) |
|--------------------------|-----------------|--|---|
| <b>Dr. Nicolas Ellen</b> | <b>Director</b> | <b>7918 Broadway Street #106<br/>Pearland, Texas 77581</b> | <b>0</b>  |
| <b>Jignesh Derasari</b>  | <b>Director</b> | <b>7918 Broadway Street #106<br/>Pearland, Texas 77581</b> | <b>0</b>  |
| <b>Jill Shockley</b>     | <b>Director</b> | <b>7918 Broadway Street #106<br/>Pearland, Texas 77581</b> | <b>0</b>  |
| <b>Renee McGuire</b>     | <b>Director</b> | <b>7918 Broadway Street #106<br/>Pearland, Texas 77581</b> | <b>0</b>  |

**Part IX Financial Data**

For purposes of this schedule, years in existence refer to completed tax years.

- If in existence less than 5 years, complete the statement for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of:
  - Three years of financial information if you have not completed one tax year, or
  - Four years of financial information if you have completed one tax year. See instructions.
- If in existence 5 or more years, complete the schedule for the most recent 5 tax years. You will need to provide a separate statement that includes information about the most recent 5 tax years because the data table in Part IX has not been updated to provide for a 5th year. See instructions.

**A. Statement of Revenues and Expenses**

|                 | Type of revenue or expense   | Current tax year                | 3 prior tax years or 2 succeeding tax years |                                 |             | (e) Provide Total for (a) through (d) |
|-----------------|--|---------------------------------|---|---------------------------------|-------------|---------------------------------------|
|                 |  | (a) From 1/14/2020 To 6/30/2020 | (b) From 7/01/2020 To 6/30/2021             | (c) From 7/01/2021 To 6/30/2022 | (d) From To |                                       |
| <b>Revenues</b> | 1 Gifts, grants, and contributions received (do not include unusual grants)  | 0                               | 0   | 0                               |             | 0                                     |
|                 | 2 Membership fees received   | 0                               | 0   | 0                               |             | 0                                     |
|                 | 3 Gross investment income  | 0                               | 0   | 0                               |             | 0                                     |
|                 | 4 Net unrelated business income  | 0                               | 0   | 0                               |             | 0                                     |
|                 | 5 Taxes levied for your benefit  | 0                               | 0   | 0                               |             | 0                                     |
|                 | 6 Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)             | 0                               | 0   | 0                               |             | 0                                     |
|                 | 7 Any revenue not otherwise listed above or in lines 9-12 below (attach an itemized list)  | 0                               | 0   | 2,417,672                       |             | 2,417,672                             |
|                 | 8 Total of lines 1 through 7   | 0                               | 0   | 2,417,672                       |             | 2,417,672                             |
|                 | 9 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list) | 0                               | 0   | 0                               |             | 0                                     |
|                 | 10 Total of lines 8 and 9  | 0                               | 0   | 2,417,672                       |             | 2,417,672                             |
|                 | 11 Net gain or loss on sale of capital assets (attach schedule and see instructions)   | 0                               | 0   | 0                               |             | 0                                     |
|                 | 12 Unusual grants  | 0                               | 0   | 0                               |             | 0                                     |
|                 | 13 Total Revenue<br>Add lines 10 through 12  | 0                               | 0   | 2,417,672                       |             | 2,417,672                             |
| <b>Expenses</b> | 14 Fundraising expenses  | 0                               | 0   | 0                               |             |                                       |
|                 | 15 Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)  | 0                               | 0   | 0                               |             |                                       |
|                 | 16 Disbursements to or for the benefit of members (attach an itemized list)  | 0                               | 0   | 0                               |             |                                       |
|                 | 17 Compensation of officers, directors, and trustees   | 0                               | 0   | 0                               |             |                                       |
|                 | 18 Other salaries and wages  | 0                               | 0   | 1,611,168                       |             |                                       |
|                 | 19 Interest expense  | 0                               | 0   | 0                               |             |                                       |
|                 | 20 Occupancy (rent, utilities, etc.)   | 0                               | 0   | 435,703                         |             |                                       |
|                 | 21 Depreciation and depletion  | 0                               | 0   | 0                               |             |                                       |
|                 | 22 Professional fees   | 0                               | 0   | 51,500                          |             |                                       |
|                 | 23 Any expense not otherwise classified, such as program services (attach itemized list)   | 0                               | 0   | 132,597                         |             |                                       |
|                 | 24 Total Expenses<br>Add lines 14 through 23   | 0                               | 0   | 2,230,968                       |             |                                       |



**Part X Public Charity Status (Continued)**

- e 509(a)(4) – an organization organized and operated exclusively for testing for public safety. ☐
- f 509(a)(1) and 170(b)(1)(A)(iv) – an organization operated for the benefit of a college or university that is owned or operated by a governmental unit. ☐
- g 509(a)(1) and 170(b)(1)(A)(ix) – an agricultural research organization directly engaged in the continuous active conduct of agricultural research in conjunction with a college or university. ☐
- h 509(a)(1) and 170(b)(1)(A)(vi) – an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public. ☐
- i 509(a)(2) – an organization that normally receives not more than one-third of its financial support from gross investment income and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions). ☐
- j A publicly supported organization, but unsure if it is described in 5h or 5i. You would like the IRS to decide the correct status. ☐

6 If you checked box h, i, or j in question 5 above, and you have been in existence more than 5 years, you must confirm your public support status. Answer line 6a if you checked box h in line 5 above. Answer line 6b if you checked box i in line 5 above. If you checked box j in line 5 above, answer both lines 6a and 6b.

- a (i) Enter 2% of line 8, column (e) on Part IX-A Statement of Revenues and Expenses \_\_\_\_\_
- (ii) Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," state this.
- b (i) For each year amounts are included on lines 1, 2, and 9 of Part IX-A Statement of Revenues and Expenses, attach a list showing the name and amount received from each **disqualified person**. If the answer is "None," state this.
- (ii) For each year amounts were included on line 9 of Part IX-A Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of Line 10, Part IX-A Statement of Revenues and Expenses, or (2) \$5,000. If the answer is "None," state this.

7 Did you receive any unusual grants during any of the years shown on Part IX-A Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual. ☐ Yes ☒ No

**Part XI User Fee Information and Signature**

You must include the correct user fee payment with this application. If you do not submit the correct user fee, we will not process the application and we will return it to you. Your check or money order must be made payable to the United States Treasury. User fees are subject to change. Check our website at [www.irs.gov](http://www.irs.gov) and type "Exempt Organizations User Fee" in the search box, or call Customer Account Services at 1-877-829-5500 for current information.

Enter the amount of the user fee paid: \$600.00

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

  
(Signature of Officer, Director, Trustee, or other  
authorized official)

Renee L. McGuire  
(Type or print name of signer)  
Director  
(Type or print title or authority of signer)

1/16/20  
(Date)

## **REQUEST FOR EXPEDITED PROCESSING**

Classical Charter Schools of Texas, Inc.; EIN: 84-4309022  
Application for Recognition of Exemption  
Under Section 501(c)(3) of the Internal Revenue Code

We believe there is a compelling reason to expedite this application because the Corporation must meet a May 15, 2020 deadline set by the Texas Education Agency to have received and submitted a determination letter from the IRS in connection with its pending State of Texas Generation 25 open enrollment charter application. This deadline must be met in order to receive federal and state grants necessary to open and operate a Texas Open-Enrollment Charter School in the fall of 2021. These federal and state grant funds for operations of the entity are dependent on a timely determination received from the IRS. Only qualified 501(c)(3) entities may receive a charter, and state law requires a determination letter from the IRS as stated above. The State of Texas has significant regulatory authority over charter schools and charter holders, unlike other states, and tightly oversees all aspects of their operations. If a determination letter is not received and expedite is not granted, Classical Charter Schools of Texas, Inc. will be ineligible to receive state and federal funding, that are contingent on it being awarded a Texas Generation 25 charter.

The exclusive purpose of Classical Charter Schools of Texas, Inc. is to own and operate a Texas Public Charter School. As an Public Charter School, Classical Charter Schools of Texas, Inc. will be a public school of choice using innovative and focused efforts to improve student learning, increase the choice of learning opportunities within the community, create professional opportunities that will attract new teachers to the community, and encourage and facilitate development of different and innovative learning methods within the Texas Public School System. It is in the best interest of the public that Classical Charter Schools of Texas, Inc. receive an expedited determination.

Thank you for your consideration in this matter. We look forward to hearing from you.



### **Attachment 3: Applicant Information Session Documentation**

Provide the *Proof of Attendance* documentation the applicant received at the conclusion of the Applicant Information Session attended in October or November 2019. Applicants who attended both sessions need only submit one document.

The Texas Education Agency (TEA) hosted identical Applicant Information Sessions on October 18, 2019 and November 1, 2019. Applicants were required to attend one of those sessions. Each session provided details about: (1) applying for (and holding) a charter in the state of Texas; (2) the contents of the Request for Application documents; and (3) application preparation and submission requirements for both electronic and hard copy versions of the application documents.

For an application to be deemed complete, at least one member of the governing board of the sponsoring entity requesting the charter **must** have attended one of the sessions and signed the *Proof of Attendance* document. The individual(s) with primary responsibility for preparing and submitting the application should also attend one of these required information sessions.

GEN25 APP INFO SESSION  
OCT 18 '19 AM9:24

Texas Education Agency  
Division of Charter School Administration

**Generation Twenty-Five Applicant Information Session Registration Form**

This form should be saved locally and must be completed using Adobe Acrobat. Preview Mode, the default program for working with PDF files on a Mac, will not work correctly. The completed form should be submitted as an attachment to [charterapplication@tea.texas.gov](mailto:charterapplication@tea.texas.gov) along with the completed application.

Attendance by one governing board member of the sponsoring entity is required. Proof of attendance will be provided to attendees for inclusion as Attachment 3 in the submitted application.

Each session will provide details about applying for and holding a charter in the state of Texas, the contents of the RFA, the application preparation guidelines and submission requirements for both electronic and hard copy application documents.

Paper copies of the RFA will NOT be made available.

Proposed Charter School Name: Cato Classical Academy - Pearland Texas

Sponsoring Entity Name as reflected on the 501(c)(3) form: Classical Charter Schools of Texas (to be set up as a Texas non-profit)

Application Contact Name: Dr. Nicholas Ellen 

Title/Role: Governing Board Chair

Email: nellen@swbellnet Phone: 832-215-0123

Board Member Attending: Dr. Nicholas Ellen

Board Member Attending: \_\_\_\_\_

Board Member Attending: \_\_\_\_\_

Board Member Attending: \_\_\_\_\_

Board Member Attending: \_\_\_\_\_

Date of Session: ☒ Friday, October 18, 2019, 8:00 a.m. - 4:30 p.m.

☐ Friday, November 1, 2019, 8:00 a.m. - 4:30 p.m.

Submit the completed form at least 24 hours prior to the session indicated above to  
[charterapplication@tea.texas.gov](mailto:charterapplication@tea.texas.gov).

If you have any questions about the sessions or registration, please contact:  
John Garland at 512-463-3533 or [John.Garland@tea.texas.gov](mailto:John.Garland@tea.texas.gov)  
Drue Ann Wise at 512-463-3419 or [DrueAnn.Wise@tea.texas.gov](mailto:DrueAnn.Wise@tea.texas.gov)



## Attachment 4: Evidence of Community Demand

Provide the following:

- **Evidence of support.** Provide documentation of any of the following outreach strategies and related results: (1) advertising content; (2) community outreach surveys; (3) social media campaigns; and (4) John 3:16 any additional documentation that demonstrates community demand for the proposed charter school.
- **Meeting Agenda.** The formal agenda that was followed during each public meeting.
- **Public meeting protocol.** This is the script or list of questions that were prepared and presented at the public meeting. Do **NOT** provide petitions, meeting sign-in sheets, or other materials that violate the public disclosure policy.
- **Letter(s) of support.** Provide (if any) non-financial letters of support from individuals, organizations, officials, etc.

During the planning and drafting period of the application, the team put together a marketing outreach program which involved: Social Media marketing, web site design, marketing materials in English and Spanish and two open houses in the Alivn/Pearland/South Houston area on December 5<sup>th</sup> and December 7<sup>th</sup> at New Harvest Christian Fellowship. The ad campaign was targeted to parents with PreSchoolers (age 3 to 5), parents with early age school children (age 6 to 8) and parents with Preteens (9 to 12). The social media campaign reached 14,140 people with 55,349 impressions. The campaign yielded 26 event respondents and RSVP's to attend.

  
CATO ACADEMY

ESCUELA PÚBLICA GRATUITA - EDUCACIÓN CLÁSICA  
**SESIONES INFORMATIVAS**

JUEVES 5 DE DICIEMBRE • 6:30-7:30PM  
SÁBADO 7 DE DICIEMBRE • 9:30-10:30AM

NEW HARVEST CHRISTIAN FELLOWSHIP  
12216 BROADWAY ST. | PEARLAND, TX 77584

La misión de Cato Classical Academy es proporcionar una población académica diversa con una base educativa para el éxito. Lo académico se mezcla con los principios de una vida virtuosa, el aprendizaje tradicional y la responsabilidad cívica. Preguntas? Email [info@CatoAcademyTexas.org](mailto:info@CatoAcademyTexas.org).

  
CATO ACADEMY

FREE PUBLIC CHARTER SCHOOL - CLASSICAL EDUCATION  
**INFORMATION SESSIONS**

THURSDAY, DECEMBER 5 • 6:30-7:30PM  
SATURDAY, DECEMBER 7 • 9:30-10:30AM

NEW HARVEST CHRISTIAN FELLOWSHIP  
12216 BROADWAY ST. | PEARLAND, TX 77584

Cato Classical Academy's mission is to provide a diverse scholar population with an educational foundation for success. Academics are blended with the principles of virtuous living, traditional learning, and civic responsibility. Questions? Email [info@CatoAcademyTexas.org](mailto:info@CatoAcademyTexas.org).

125

**COPYRIGHT MATERIAL**

1 page has been withheld

**PLEASE NOTE: The responsive information contains copyrighted information that can only be made available to you for viewing in person. Because the information indicates that it is protected by copyright, you may review this information in person during normal business hours at TEA. If you are interested in reviewing the copyrighted information, please send an email to [CharterSchools@tea.texas.gov](mailto:CharterSchools@tea.texas.gov) to schedule an appointment.**





**Agenda – Outline of Open House Meetings for December 5<sup>th</sup> and 7<sup>th</sup> 2019.**  
**New Harvest Christian Fellowship**

1. Opening Introductions
  - a. Mr. Higgins –
    - i. Overview of what a charter school is
    - ii. Brief introduction of what Classical Education and Charlotte Mason education is and what it means to families in the area.
    - iii. Proposed location and time frame of opening
    - iv. Details on the campus, academics, arts program, athletics, after school services, dress code.
  - b. Mr. Towne – Classical Teacher
    - i. A day in the life of a Classical School
    - ii. The nuances of the Trivium and stages of learning
    - iii. The role of academic rigor AND character development
    - iv. How we find and prepare top teachers
  - c. The nuts and bolts of the academics at Cato Academy
    - i. Discussion on novels, Great Books Foundation, Socratic discussions.
    - ii. The Role of History in the Classical Model – Making History Important Again discussion
    - iii. High expectations and a love of learning.
  - d. Mr. Higgins - Partnering with Parents – Adlerian Foundations of our School
    - i. Mission and Vision Statement discussion (the mission and vision will be playing on the AV during the presentation).
    - ii. Explanation of the Cato Academy House System and parent opportunities to engage in the school. Service projects in the community and each house adoption of an annual event.
    - iii. Parent leadership and the School Advisory Council (SAC).
    - iv. Clear boundaries of how we support parents in the education of their children.
    - v. Parents on campus (Muffins with Mom's and Donuts with Dads, Open Houses, Teacher at the Curb, calls home, the Remind App for instant classroom communication, grade level newsletters).
  - e. Question Prompts
    - i. What do you like or dislike about your current school?
    - ii. Do you feel like you have choices in your child's education? What barriers are there to choosing a school that fits your child?
    - iii. Any questions or comments on what we discussed surrounding classical education?
    - iv. What services, clubs, arts programs or athletics are important to you?

## Attachment 5: Certified Mail Receipt Cards

Provide certified mail return receipt cards (green cards) showing the dates the Statement of Impact forms and Application Coversheets were received by:

- **Each Superintendent and President of the Board of Trustees** of each traditional school district from which the proposed charter school intends to draw students;
- **Each member of the Texas Legislature** who represents the geographic area(s) to be served by the proposed charter school; and
- **Each Texas State Board of Education member** who represents the geographic area(s) to be served by the proposed charter school.


In the absence of signed certified mail return receipt cards (green cards), the certified mail receipt (white and green slip) showing each school district, fees paid, and the date mailed will be accepted.

Mailing address **must** include the name of the school district to which the information was sent.

**Arrange certified mail receipts in alphabetical order by district. Limit six receipts per page.**

Statement of Impact Forms are available on the [Subchapter D](#) application page. The Statement of Impact Form is the formal opportunity for superintendents of traditional districts to document any impact the proposed charter school might have. While applicants are required to distribute these documents, they are not responsible for ensuring that superintendents return the Statement of Impact Forms to the TEA.

**Certified Mail Return Receipt Card**

| SENDER: COMPLETE THIS SECTION  |  | COMPLETE THIS SECTION ON DELIVERY  |  |
|--|--|--|--|
| <p>■ Complete Items 1, 2, and 3.</p> <p>■ Print your name and address on the reverse so that we can return the card to you.</p> <p>■ Attach this card to the back of the mailpiece, or on the front if space permits.</p> <p>1. Article Addressed to:</p> <p><b>SAMPLE</b></p>  <p>9590 9401 0000 5191 0000 12</p> <p>2. Article Number (Transfer from service label)</p>   |  | <p>A. Signature</p> <p><b>X</b> <input type="checkbox"/> Agent <input type="checkbox"/> Addressee</p> <p>B. Received by (Printed Name) C. Date of Delivery</p> <p>D. Is delivery address different from item 1? <input type="checkbox"/> Yes<br/>If YES, enter delivery address below: <input type="checkbox"/> No</p> |  |
| <p>3. Service Type</p> <p><input type="checkbox"/> Adult Signature <input type="checkbox"/> Registered Mail Express®</p> <p><input type="checkbox"/> Adult Signature Restricted Delivery <input type="checkbox"/> Registered Mail™</p> <p><input type="checkbox"/> Certified Mail® <input type="checkbox"/> Registered Mail Restricted Delivery</p> <p><input type="checkbox"/> Certified Mail Restricted Delivery <input type="checkbox"/> Return Receipt for Merchandise</p> <p><input type="checkbox"/> Collect on Delivery Restricted Delivery <input type="checkbox"/> Signature Confirmation™</p> <p><input type="checkbox"/> Insured Mail <input type="checkbox"/> Signature Confirmation Restricted Delivery</p> <p><input type="checkbox"/> Insured Mail Restricted Delivery (over \$500)</p> |  |  |  |

## Certified Mail Receipt

|  |  |  |  |
|--|--|--|--|
| <b>7001 2510 0005 0665 6437</b><br>POSTNET barcode<br><b>CERTIFIED MAIL</b><br>First-class postage paid by addressee |  | <b>7001 2510 0005 0665 6437</b><br>POSTNET barcode                                   |  |
|                                   |  |  |  |
| <b>7001 2510 0005 0665 6437</b><br>POSTNET barcode   |  | <b>7001 2510 0005 0665 6437</b><br>POSTNET barcode                                   |  |
| U.S. Postal Service<br><b>CERTIFIED MAIL RECEIPT</b><br>(Domestic Mail Only, No Insurance Coverage Provided)         |  | <b>OFFICIAL USE</b>  |  |
| Postage \$ _____   |  | Postmark _____   |  |
| Certified Fee \$ _____   |  | Return Receipt Fee (Endorsement Required) \$ _____                                   |  |
| Restricted Delivery Fee (Endorsement Required) \$ _____  |  | Total Postage & Fees \$ _____  |  |
| Sent to _____<br>(Insert Zip Code)<br>or PO Box No. _____<br>City, State, ZIP+4 _____                                |  |  |  |
| 170 Evans Street, January 2001   |  | Fee Received by Addressee  |  |



7019 1120 0000 3522 3495

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

ALVIN, TX 77511

**OFFICIAL USE**

Certified Mail Fee \$3.50 0724 36

Extra Services & Fees (check box, add fee to postage):  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$7.35

Total Postage and Fees \$13.65

Sent To: Carol Nelson, Superintendent  
 Street and Apt. No., or PO Box No.: 301 E. House St.  
 City, State, ZIP+4®: Alvin, TX 77511

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3488

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

ALVIN, TX 77511

**OFFICIAL USE**

Certified Mail Fee \$3.50 0724 36

Extra Services & Fees (check box, add fee to postage):  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$7.35

Total Postage and Fees \$13.65

Sent To: Earl Humbird, President  
 Street and Apt. No., or PO Box No.: 301 E. House Street  
 City, State, ZIP+4®: Alvin, TX 77511

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3518

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77092

**OFFICIAL USE**

Certified Mail Fee \$3.50 0724 36

Extra Services & Fees (check box, add fee to postage):  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$7.35

Total Postage and Fees \$13.65

Sent To: Gredita Lathan, Superintendent  
 Street and Apt. No., or PO Box No.: 4400 W. 18th St.  
 City, State, ZIP+4®: Houston, TX 77092

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3501

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77092

**OFFICIAL USE**

Certified Mail Fee \$3.50 0724 36

Extra Services & Fees (check box, add fee to postage):  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$7.35

Total Postage and Fees \$13.65

Sent To: Diana Davila, President  
 Street and Apt. No., or PO Box No.: 4400 West 18th St.  
 City, State, ZIP+4®: Houston, TX 77092

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3693

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

PEARLAND, TX 77581

**OFFICIAL USE**

Certified Mail Fee \$3.50 0724 36

Extra Services & Fees (check box, add fee to postage):  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$7.35

Total Postage and Fees \$13.65

Sent To: Dr. John Kelly, Superintendent  
 Street and Apt. No., or PO Box No.: 1928 N. Main  
 City, State, ZIP+4®: Pearland, TX 77581

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3686

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

PEARLAND, TX 77581

**OFFICIAL USE**

Certified Mail Fee \$3.50 0724 36

Extra Services & Fees (check box, add fee to postage):  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$7.35

Total Postage and Fees \$13.65

Sent To: Charles Gooden Jr., President  
 Street and Apt. No., or PO Box No.: 1928 N. Main St  
 City, State, ZIP+4®: Pearland, TX 77581

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7019 1120 0000 3522 3587

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

HOUSTON, TX 77096

**OFFICIAL USE**

|  |         |      |    |
|--|---------|------|----|
| Certified Mail Fee   | \$3.50  | 0724 | 36 |
| Extra Services & Fees (check box, add fee)                   | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (hardcopy)           | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (electronic)         | \$0.00  |      |    |
| <input type="checkbox"/> Certified Mail Restricted Delivery  | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Required            | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Restricted Delivery | \$0.00  |      |    |
| Postage  | \$7.35  |      |    |
| Total Postage and Fees                                       | \$13.65 |      |    |

Sent To: Alma Alkany Rep  
Street and Apt. No., or PO Box No. 10101 Fairview Rd #500  
City, State, ZIP+4® Houston TX 77096

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3532

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

HOUSTON, TX 77004

**OFFICIAL USE**

|  |         |      |    |
|--|---------|------|----|
| Certified Mail Fee   | \$3.50  | 0724 | 36 |
| Extra Services & Fees (check box, add fee)                   | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (hardcopy)           | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (electronic)         | \$0.00  |      |    |
| <input type="checkbox"/> Certified Mail Restricted Delivery  | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Required            | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Restricted Delivery | \$0.00  |      |    |
| Postage  | \$7.35  |      |    |
| Total Postage and Fees                                       | \$13.65 |      |    |

Sent To: Senator Burnz L. Miles  
Street and Apt. No., or PO Box No. 3202 Alameda Suite A  
City, State, ZIP+4® Houston TX 77004

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3525

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

HOUSTON, TX 77029

**OFFICIAL USE**

|  |         |      |    |
|--|---------|------|----|
| Certified Mail Fee   | \$3.50  | 0724 | 36 |
| Extra Services & Fees (check box, add fee)                   | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (hardcopy)           | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (electronic)         | \$0.00  |      |    |
| <input type="checkbox"/> Certified Mail Restricted Delivery  | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Required            | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Restricted Delivery | \$0.00  |      |    |
| Postage  | \$7.35  |      |    |
| Total Postage and Fees                                       | \$13.65 |      |    |

Sent To: Senator Carol Alvarado  
Street and Apt. No., or PO Box No. 3709 N. Loop Ewy, 340  
City, State, ZIP+4® Houston, TX 77029

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3570

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

HOUSTON, TX 77004

**OFFICIAL USE**

|  |         |      |    |
|--|---------|------|----|
| Certified Mail Fee   | \$3.50  | 0724 | 36 |
| Extra Services & Fees (check box, add fee)                   | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (hardcopy)           | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (electronic)         | \$0.00  |      |    |
| <input type="checkbox"/> Certified Mail Restricted Delivery  | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Required            | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Restricted Delivery | \$0.00  |      |    |
| Postage  | \$7.35  |      |    |
| Total Postage and Fees                                       | \$13.65 |      |    |

Sent To: Garnet Calman  
Street and Apt. No., or PO Box No. 5405 Alameda Suite 501  
City, State, ZIP+4® Houston TX 77004

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3549

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

PEARLAND, TX 77581

**OFFICIAL USE**

|  |         |      |    |
|--|---------|------|----|
| Certified Mail Fee   | \$3.50  | 0724 | 36 |
| Extra Services & Fees (check box, add fee)                   | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (hardcopy)           | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (electronic)         | \$0.00  |      |    |
| <input type="checkbox"/> Certified Mail Restricted Delivery  | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Required            | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Restricted Delivery | \$0.00  |      |    |
| Postage  | \$7.35  |      |    |
| Total Postage and Fees                                       | \$13.65 |      |    |

Sent To: Larry Taylor, Senator  
Street and Apt. No., or PO Box No. 1117 Broadway Suite 120  
City, State, ZIP+4® Houston TX 77581

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7019 1120 0000 3522 3563

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

PEARLAND, TX 77581

**OFFICIAL USE**

|  |         |      |    |
|--|---------|------|----|
| Certified Mail Fee   | \$3.50  | 0724 | 36 |
| Extra Services & Fees (check box, add fee)                   | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (hardcopy)           | \$0.00  |      |    |
| <input type="checkbox"/> Return Receipt (electronic)         | \$0.00  |      |    |
| <input type="checkbox"/> Certified Mail Restricted Delivery  | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Required            | \$0.00  |      |    |
| <input type="checkbox"/> Adult Signature Restricted Delivery | \$0.00  |      |    |
| Postage  | \$7.35  |      |    |
| Total Postage and Fees                                       | \$13.65 |      |    |

Sent To: Ed Thompson, Rep  
Street and Apt. No., or PO Box No. 2341 N. Galveston #120  
City, State, ZIP+4® Pearland TX 77581

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



1/18/2020

Cato Academy Mail - Proposed Charter Open House - Pearland - Alvin - S. Houston



Joseph Higgins <info@catoacademytexas.org>

## Proposed Charter Open House - Pearland - Alvin - S. Houston

1 message

Joseph Higgins <info@catoacademytexas.org>

Mon, Dec 2, 2019 at 11:56 AM

To: charterapplication@tea.texas.gov

Cc: Ed.Thompson@house.texas.gov, larry.taylor@senate.texas.gov, sboesupport@tea.texas.gov, donna.bahorich@tea.texas.gov, barbara.cargill@tea.texas.gov, ruben.cortez@tea.texas.gov, Aicha.Davis@tea.texas.gov, keven.ellis@tea.texas.gov, pam.little@tea.texas.gov, tom.maynard@tea.texas.gov, sue.melton.malone@tea.texas.gov, ken.mercer@tea.texas.gov, marisa.perez@tea.texas.gov, georgina.perez@tea.texas.gov, matt.robinson@tea.texas.gov, marty.rowley@tea.texas.gov, garnet.coleman@house.texas.gov, Alma.Allen@house.texas.gov, carol.alvarado@house.texas.gov

Bcc: [REDACTED], john.garland@tea.texas.gov

The Cato Academy Texas Board of Directors will hold public informational meetings on Thursday, December 5, 2019, and Saturday, December 7, 2019. The evening session will take place on Thursday from 6:30-7:30 pm and the morning session will take place on Saturday from 9:30-11:30 am. Meetings will be held at New Harvest Christian Fellowship (12216 Broadway St, Pearland, TX 77046).

The meetings will provide information about Cato Academy Texas, a proposed open-enrollment elementary charter school designed to educate children in grades K-8 in Pearland. Attendance is provided with the opportunity to ask questions about the school.

If approved, Cato Academy Texas school and non-profit governing board will open Fall 2020. The school board include Jignesh Derasari, Dr. Nicholas Ellen, Renee McGuire, Jill Shockley, and Brendan Warren.

Join us to learn more about a proposed new Classical Education charter school in the Pearland/Alvin and South Houston region.



January 10, 2020

Name of Sponsoring Entity  
Address  
City, State, Zip Code

### TEMPLATE STATEMENT OF IMPACT LETTER

This letter is to inform you that Cato Classical Academy intends to submit an application to the Texas Education Agency in response to the Generation Twenty-Five Open-Enrollment charter school application process. Statutory guidelines require that applicants send the enclosed Statement of Impact form and a copy of the completed Application Coversheet to each district that may be affected by the proposed charter school.

Your district is receiving this information because the proposed charter school's designated geographic boundary overlaps with your district's boundary. The proposed charter school's designated geographic boundary will include the following districts:

**Pearland ISD  
Alvin ISD  
Houston ISD**

The attached Statement of Impact form provides a district with an opportunity to inform the commissioner of whether the proposed charter school may adversely impact it financially or in some other respect. Completed forms may be returned to:

**Texas Education Agency Attention:  
John Garland 1701 North Congress Avenue  
Austin, Texas 78701**

Forms must be received no later than Friday, February 21, 2020, for the information to be considered. If you have questions about the process for approval of open-enrollment charter schools, please contact the Division of Charter School Administration at (512) 463-3533 or visit [http://tea.texas.gov/Texas\\_Schools/Charter\\_Schools/](http://tea.texas.gov/Texas_Schools/Charter_Schools/).

Our application will be available on the Texas Education Agency Charter School webpage on (or around) February 21, 2020. If you would like a complete application prior to that date, please contact Cato Academy, Joe Higgins at 281-997-1500.

Sincerely,  
Joe Higgins  
Superintendent  
Cato Classical Academy

Enclosures: Statement of Impact form  
Application Coversheet

cc: Legislative Representative(s)  
State Board of Education member



7019 0160 0000 0620 8927

U.S. Postal Service™  
**CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

DICKINSON, TX 77539

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55  
Total Postage and Fees \$6.95

Sent To State Board Matt Robinson  
Street and Apt. No., or PO Box No. 333 FM 517 West  
City, State, ZIP+4® Dickinson, TX 77539

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7019 0160 0000 0620 8941

U.S. Postal Service™  
**CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

CONROE, TX 77384

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55  
Total Postage and Fees \$6.95

Sent To SPOE - Barbara Cargill, Dia 8  
Street and Apt. No., or PO Box No. 15257 Kunnymede St  
City, State, ZIP+4® Conroe, TX 77384

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7019 0160 0000 0620 8965

U.S. Postal Service™  
**CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77076

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55  
Total Postage and Fees \$6.95

Sent To State Rep. Armando Walle  
Street and Apt. No., or PO Box No. 150 W. Parkway Rd, Suite 700  
City, State, ZIP+4® Houston, TX 77076

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7019 0160 0000 0620 8934

U.S. Postal Service™  
**CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

Cured during Remedy Period

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

AUSTIN, TX 78701

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55  
Total Postage and Fees \$6.95

Sent To State Board of Ed. Donna Bakerich (6)  
Street and Apt. No., or PO Box No. 1701 N. Congress Ave, Ste 1-69  
City, State, ZIP+4® Austin, TX 78701

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7019 0160 0000 0620 8958

U.S. Postal Service™  
**CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77029

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55  
Total Postage and Fees \$6.95

Sent To State Rep. Ana Hernandez Dia 143  
Street and Apt. No., or PO Box No. 1253 Mercury Dr  
City, State, ZIP+4® Houston TX 77029

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7019 0160 0000 0620 8989

U.S. Postal Service™  
**CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77087

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55  
Total Postage and Fees \$6.95

Sent To State Rep. Christine Morales  
Street and Apt. No., or PO Box No. 6940 Rusty St, Suite 107  
City, State, ZIP+4® Houston TX 77087

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions





# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

ANGLETON, TX 77515

Certified Mail Fee \$3.55  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Dennis Bonner

Street and Apt. No., or PO Box No. 122 E. Myrtle

City, State, ZIP+4® Angleton TX 77515

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions



# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77058

Certified Mail Fee \$3.55  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$8.95

Sent To State Rep Dennis Paul

Street and Apt. No., or PO Box No. 17225 El Camino Real Blvd #415

City, State, ZIP+4® Houston TX 77058

PS Form 3800, April 2015 PSN 7530-02-000-9047



# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77080

Certified Mail Fee \$3.55  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Dwayne Bohac

Street and Apt. No., or PO Box No. 2600 Gessner Suite 212

City, State, ZIP+4® Houston TX 77080

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions



# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77074

Certified Mail Fee \$3.55  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Gene Wu

Street and Apt. No., or PO Box No. 4500 Rookin Building C

City, State, ZIP+4® Houston TX 77074

PS Form 3800, April 2015 PSN 7530-02-000-9047



# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

LEAGUE CITY, TX 77573

Certified Mail Fee \$3.55  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

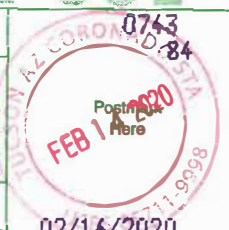
Sent To State Rep Greg Bonner

Street and Apt. No., or PO Box No. 174 Calder Rd. Ste 116

City, State, ZIP+4® League City TX 77573

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions



# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77029

Certified Mail Fee \$3.55  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Harold Dutton

Street and Apt. No., or PO Box No. 8499 N. Loop East Suite 200

City, State, ZIP+4® Houston TX 77029

PS Form 3800, April 2015 PSN 7530-02-000-9047





U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77091

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Jarvis Johnson

Street and Apt. No., or PO Box No.

City, State, ZIP+4® Houston, TX 77091

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions

0743  
84  
CORONADO  
FEB 14 2020  
Postmark Here  
02/14/2020

U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

AUSTIN, TX 78768

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Jessica Farrar

Street and Apt. No., or PO Box No.

City, State, ZIP+4® Austin, TX 78768

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions

0743  
84  
CORONADO  
FEB 14 2020  
Postmark Here  
02/14/2020

U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77024

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Jim Murphy

Street and Apt. No., or PO Box No.

City, State, ZIP+4® Houston, TX 77024

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions

0743  
84  
CORONADO  
FEB 14 2020  
Postmark Here  
02/14/2020

U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

LAKE JACKSON, TX 77566

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Sen Jean Huffman

Street and Apt. No., or PO Box No.

City, State, ZIP+4® Lake Jackson, TX 77566

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions

0743  
84  
CORONADO  
FEB 14 2020  
Postmark Here  
02/14/2020

U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

HOUSTON, TX 77007

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Sen John Whitmire

Street and Apt. No., or PO Box No.

City, State, ZIP+4® Houston, TX 77007

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions

0743  
84  
CORONADO  
FEB 14 2020  
Postmark Here  
02/14/2020

U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

PASADENA, TX 77506

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep Mary Ann Perez

Street and Apt. No., or PO Box No.

City, State, ZIP+4® Pasadena, TX 77506

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions

0743  
84  
CORONADO  
FEB 14 2020  
Postmark Here  
02/14/2020



7019 0160 0000 0620 9078

U.S. Postal Service<sup>TM</sup>  
**CERTIFIED MAIL<sup>®</sup> RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com).

HOUSTON, TX 77079

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Sen. Paul Bellencourt.  
Street and Apt. No., or PO Box No. 1451 Katy Freeway Suite 209.  
City, State, ZIP+4<sup>®</sup> Houston, TX 77079.

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions



7019 0160 0000 0620 9047

U.S. Postal Service<sup>TM</sup>  
**CERTIFIED MAIL<sup>®</sup> RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com).

BELLAIRE, TX 77401

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep. Sarah Davis  
Street and Apt. No., or PO Box No. e306 W Loop South Suite 140  
City, State, ZIP+4<sup>®</sup> Bellaire, TX 77401

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions



7019 0160 0000 0620 9054

U.S. Postal Service<sup>TM</sup>  
**CERTIFIED MAIL<sup>®</sup> RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com).

HOUSTON, TX 77016

Certified Mail Fee \$3.55  
\$2.85  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$0.00  
☐ Return Receipt (electronic) \$0.00  
☐ Certified Mail Restricted Delivery \$0.00  
☐ Adult Signature Required \$0.00  
☐ Adult Signature Restricted Delivery \$0.00

Postage \$0.55

Total Postage and Fees \$6.95

Sent To State Rep. Bertronia Thompson  
Street and Apt. No., or PO Box No. 10524 Homestead Rd.  
City, State, ZIP+4<sup>®</sup> Houston TX 77016

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions



7019 0160 0000 0620 9060

U.S. Postal Service<sup>TM</sup>  
**CERTIFIED MAIL<sup>®</sup> RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com).

OFFICIAL USE

Certified Mail Fee  
\$  
Extra Services & Fees (check box, add fee as appropriate)  
☐ Return Receipt (hardcopy) \$  
☐ Return Receipt (electronic) \$  
☐ Certified Mail Restricted Delivery \$  
☐ Adult Signature Required \$  
☐ Adult Signature Restricted Delivery \$

Postage \$

Total Postage and Fees \$

Sent To State Rep. Shawn Thierry.  
Street and Apt. No., or PO Box No. 2166 S Loop West, Suite 35  
City, State, ZIP+4<sup>®</sup> Houston TX 77054

PS Form 3800, April 2015 PSN 7530-02-000-9047

See Reverse for Instructions



## Attachment 6: Published Notice(s) of Public Meetings

At a minimum, applicants must hold one public meeting within the charter school's proposed geographic boundary to discuss the application for the proposed Generation 25 open-enrollment charter school.

This meeting must take place no earlier than **18 months** before the charter application submission date. Consequently, any public meetings that were held before **July 21, 2018** are not eligible for consideration.

Anyone may attend and participate in the public meeting.

**ATTENTION:** All submitted notices must be dated prior to **January 21, 2020**.

Provide a scanned/photocopy of the official public notice/advertisement that was printed in the newspaper. The copy of the notice that is provided in this application **must** include the name of the publication and the publication date. Each public notice must include:

- Name of the proposed school/campus;
- Name of the sponsoring entity;
- Date, time, and place of public meeting; and
- Names of all board members from the sponsoring entity.

All public notices/advertisements must be published in a newspaper of general distribution within the geographic boundary of the proposed charter school. Any public notice in newspaper(s) with limited circulation (*Greensheet, Dallas Observer, Austin Chronicle*, etc.) will be ineligible for consideration.

All public notices/advertisements must be published in a newspaper that is distributed in print format. Newspapers available only in digital format are not acceptable.

**ADDITIONAL REQUIREMENT:** Applicants must notify, via their government email, all members of the [Texas State Board of Education](#) (SBOE) and the [Texas state legislature](#) who represent the geographic area to be served by the proposed school. *Applicants must include [charterapplication@tea.texas.gov](mailto:charterapplication@tea.texas.gov) in the CC line of the email.* Each email must include:

- Name of the proposed school/campus;
- Name of the sponsoring entity;
- Date, time, and place of public meeting; and
- Names of all board members from the sponsoring entity.





## AFFIDAVIT OF PUBLICATION

## STATE OF TEXAS:

Before me, the undersigned authority, a Notary Public in and for the State of Texas, on this day personally appeared, the Newspaper Representative at the HOUSTON CHRONICLE, a daily newspaper published in Harris County, Texas, and generally circulated in the Counties of: HARRIS, TRINITY, WALKER, GRIMES, POLK, SAN JACINTO, WASHINGTON, MONTGOMERY, LIBERTY, AUSTIN, WALLER, CHAMBERS, COLORADO, BRAZORIA, FORT BEND, GALVESTON, WHARTON, JACKSON, and MATAGORDA and that the publication, of which the annexed herein, or attached to, is a true and correct copy, was published to-wit:

TAGLINE GROUP  
RAN A LEGAL NOTICE  
SIZE BEING: 2 x17 L

0000206505 HC008602322

Product  
Houston Chronicle

Date  
Nov 29 2019

Class  
Legal Notices

Page  
B 4

*Victoria Bond AR Clark*  
NEWSPAPER REPRESENTATIVE

Sworn and subscribed to before me, this <sup>17th</sup> ~~29th~~ Day of ~~November~~ <sup>January</sup> A.D. ~~2019~~ <sup>2020</sup>

Notary Public in and for the State of Texas



## Order Confirmation

|                                      |  |   |                                      |
|--------------------------------------|--|---|--------------------------------------|
| <u>Ad Order Number</u><br>0000206505 | <u>Customer</u><br>TAGLINE GROUP                                   | <u>Payer Customer</u><br>TAGLINE GROUP                          | <u>PO Number</u>                     |
| <u>Sales Rep.</u><br>HC0630          | <u>Customer Account</u><br>[REDACTED]                              | <u>Payer Account</u><br>[REDACTED]                              | <u>Ordered By</u><br>Heather Grizoff |
| <u>Order Taker</u><br>cwolford       | <u>Customer Address</u><br>1655 N. SWAN RD.<br>TUCSON AZ 85712 USA | <u>Payer Address</u><br>1655 N. SWAN RD.<br>TUCSON AZ 85712 USA | <u>Customer Fax</u>                  |
| <u>Order Source</u>                  | <u>Customer Phone</u><br>5202078910                                | <u>Payer Phone</u><br>5202078910                                | <u>Customer Email</u>                |
|                                      |  |   | <u>Special Pricing</u>               |

|                         |                    |                        |                  |                   |                  |
|-------------------------|--------------------|------------------------|------------------|-------------------|------------------|
| <u>Tear Sheets</u><br>0 | <u>Proofs</u><br>0 | <u>Affidavits</u><br>1 | <u>Blind Box</u> | <u>Promo Type</u> | <u>Materials</u> |
|-------------------------|--------------------|------------------------|------------------|-------------------|------------------|

Invoice Text

Ad Order Notes

|                               |                               |                             |                                 |                                  |                                 |                               |
|-------------------------------|-------------------------------|-----------------------------|---------------------------------|----------------------------------|---------------------------------|-------------------------------|
| <u>Gross Amount</u><br>464.34 | <u>Net Amount</u><br>\$464.34 | <u>Tax Amount</u><br>\$0.00 | <u>Total Amount</u><br>\$464.34 | <u>Payment Method</u><br>Invoice | <u>Payment Amount</u><br>\$0.00 | <u>Amount Due</u><br>\$464.34 |
|-------------------------------|-------------------------------|-----------------------------|---------------------------------|----------------------------------|---------------------------------|-------------------------------|

|                                   |                         |                                      |                         |
|-----------------------------------|-------------------------|--------------------------------------|-------------------------|
| <u>Ad Number</u><br>0000206505-01 | <u>Ad Type</u><br>Legal | <u>Production Method</u><br>AdBooker | <u>Production Notes</u> |
|-----------------------------------|-------------------------|--------------------------------------|-------------------------|

|                           |                      |                          |                |
|---------------------------|----------------------|--------------------------|----------------|
| <u>External Ad Number</u> | <u>Ad Attributes</u> | <u>Ad Released</u><br>No | <u>Pick Up</u> |
|---------------------------|----------------------|--------------------------|----------------|

|                             |              |
|-----------------------------|--------------|
| <u>Ad Size</u><br>2 X 17 II | <u>Color</u> |
|-----------------------------|--------------|

The Cato Academy Texas Board of Directors will hold public informational meetings on Thursday, December 5, 2019, and Saturday, December 7, 2019. The evening session will take place on December 5th from 6:30-7:30 pm and the morning session will take place on December 7th from 9:30-10:30 am. Both meetings will be held at New Harvest Christian Fellowship (12216 Broadway St, Pearland, TX 77584). The meetings will provide information about Cato Academy Texas, a proposed open-enrollment elementary charter school designed to educate children in grades K-8 in Pearland. Attendees will be provided with the opportunity to ask questions about the school. If approved, Cato Academy Texas will open Fall 2021. members of the school board include Jignesh Derasari, Dr. Nicholas Ellen, Renee McGuire, Jill Shockley, and Dr. Brendon Warren.

|   |                                    |   |   |  |
|---|------------------------------------|---|---|--|
| <u>Product</u><br>Houston Chronicle<br>Online | <u>Placement</u><br>Legal<br>Legal | <u>Position</u><br>Legal Notices<br>Legal Notices | <u>First Run Date</u><br>Friday, November 29, 2019<br>Friday, November 29, 2019 | <u>Last Run Date</u><br>Friday, November 29, 2019<br>Friday, November 29, 2019 |
|---|------------------------------------|---|---|--|

134



**Invoice Text****Gross Amount**

464.34

| <b><u>Ad Number</u></b> | <b><u>Ad Type</u></b> |
|-------------------------|-----------------------|
| 0000206505-01           | Legal                 |

| <b><u>External Ad Number</u></b> | <b><u>Ad .</u></b> |
|----------------------------------|--------------------|
|----------------------------------|--------------------|

| <b><u>Ad Size</u></b> | <b><u>Color</u></b> |
|-----------------------|---------------------|
| 2 X 17 li             |                     |

**The Cato Academy Texas Board of Directors will** hold public informational meetings on Thursday, December 5, 2019, and Saturday, December 7, 2019. The evening session will take place on December 5th from 6:30-7:30 pm and the morning session will take place on December 7th from 9:30-10:30 am. Both meetings will be held at New Harvest Christian Fellowship (12216 Broadway St. Pearland, TX 77584). The meetings will provide information about Cato Academy Texas, a proposed open-enrollment elementary charter school designed to educate children in grades K-8 in Pearland. Attendees will be provided with the opportunity to ask questions about the school. If approved, Cato Academy Texas will open Fall 2021, members of the school board include Jignesh Derasari, Dr. Nicholas Ellen, Renee McGuire, Jill Shockley, and Dr. Brendon Warren.

**Product**Houston Chronicle  
Online

## **Attachment 7: Sample Course Scope and Sequence**

Provide a sample scope and sequence for one course in a core content area that will be taught during the school's first year.



## Scope & Sequence 5<sup>th</sup> Grade Math

|  |  |   |
|--|--|---|
| <b>Course Name:</b> 5 <sup>th</sup> Grade Mathematics<br><b>TSDS PEIMS Code:</b>   |  | <b>Course Text Options:</b><br><br>Teacher Generated Resources - iStation – Saxon Math – Singapore Math<br><br>Dave Ramsey's Office – Foundations of Personal Finance (TEA Approved for financial literacy instruction) |
| <b>Course Description:</b> Introduction. The primary focal areas in Grade 5 are solving problems involving all four operations with positive rational numbers, determine and generate formulas and solutions to expressions, and extending measurement to area and volume. These focal areas are supported throughout the mathematical strands of number and operations, algebraic reasoning, geometry and measurement, and data analysis. In Grades 3-5 the number set is limited to positive rational numbers. In number and operations, students will apply place value and identify part-to-whole relationships and equivalence. In algebraic reasoning, students will represent and solve problems with expressions and equations, build foundations of functions through patterning, identify prime and composite numbers, and use the order of operations. In geometry and measurement, students will classify two dimensional figures, connect geometric attributes to the measures of three dimensional figures, use units of measure, and represent location using a coordinate plane. In data analysis, students will represent and interpret data. (TEA) |  |   |
| <b>NOTE:</b> These standards prepare scholars for the end of year TEKS exams.  |  |   |
| <b>Assessment:</b> The structure in the classroom for math instruction will be a balance of INSTRUCTION, PRACTICE and ASSESSMENT. Every 10 lessons an assessment is given to check the class for understanding and to give the teacher feedback on how concepts are being retained. Continual, distributed practice ensures that concepts are committed to students' long-term memory and that students achieve automaticity of basic math skills.   |  |   |
| <b>Total Number of Periods</b>   | <b>175 Periods</b>   |   |
| <b>Total Number of Minutes</b>   | <b>9,456 Minutes</b>   |   |
| <b>Total Number of Hours</b>   | <b>157.6 Hours</b>   |   |
| <b>Anchor Standards - Math</b>   | <b># of Class Periods*</b><br>(assumes 55-minute periods)<br>Total minutes per quarter | <b>TEKS Standards Covered</b>   |

|   |                                       |  |
|---|---------------------------------------|--|
| <p><b>Quarter 1: Numbers and Operations – Refresh to Mastery</b></p> <p>1A) apply mathematics to problems arising in everyday life, society, and the workplace</p> <p>Scholars apply their understanding of fractions and fraction models to represent the addition and subtraction of fractions with unlike denominators as equivalent calculations with like denominators. Students make reasonable estimates of fraction and decimal sums and differences and add and subtract fractions and add, subtract, multiply, and divide decimals to solve problems. Students apply their understanding of multiplication and division to build understanding of multiplication and division of fractions.</p> <p>2) Number and operations. The student applies mathematical process standards to represent, compare, and order positive rational numbers and understand relationships as related to place value.</p> <p>3) Number and operations. The student applies mathematical process standards to develop and use strategies and methods for positive rational number computations in order to solve problems with efficiency and accuracy.</p> | <p>43 Periods</p> <p>2365 Minutes</p> | <p>1B) use a problem-solving model that incorporates analyzing given information, formulating a plan or strategy, determining a solution, justifying the solution, and evaluating the problem-solving process and the reasonableness of the solution;</p> <p>1C) select tools, including real objects, manipulatives, paper and pencil, and technology as appropriate, and techniques, including mental math, estimation, and number sense as appropriate, to solve problems;</p> <p>1D) communicate mathematical ideas, reasoning, and their implications using multiple representations, including symbols, diagrams, graphs, and language as appropriate;</p> <p>1E) create and use representations to organize, record, and communicate mathematical ideas;</p> <p>1F) analyze mathematical relationships to connect and communicate mathematical ideas; and</p> <p>1G) display, explain, and justify mathematical ideas and arguments using precise mathematical language in written or oral communication.</p> <p>2A) <i>represent the value of the digit in decimals through the thousandths using expanded notation and numerals;</i></p> <p>2B) compare and order two decimals to thousandths and represent comparisons using the symbols <math>&gt;</math>, <math>&lt;</math>, or <math>=</math>; and</p> <p>2C) round decimals to tenths or hundredths</p> <p>3A) estimate to determine solutions to mathematical and real-world problems involving addition, subtraction, multiplication, or division;</p> <p>3B) multiply with fluency a three-digit number by a two-digit number using the standard algorithm;</p> <p>3C) solve with proficiency for quotients of up to a four-digit dividend by a two-digit divisor using strategies and the standard algorithm;</p> <p>3D) represent multiplication of decimals with products to the hundredths using objects and pictorial models, including area models;</p> <p>3E) solve for products of decimals to the hundredths, including situations involving money, using strategies based on place-value understandings, properties of operations, and the relationship to the multiplication of whole numbers;</p> |
|---|---------------------------------------|--|



|   |                                    |  |
|---|------------------------------------|--|
|   |                                    | <p>3F) represent quotients of decimals to the hundredths, up to four-digit dividends and two-digit whole number divisors, using objects and pictorial models, including area models;</p> <p>3G) solve for quotients of decimals to the hundredths, up to four-digit dividends and two-digit whole number divisors, using strategies and algorithms, including the standard algorithm;</p> <p>3H) represent and solve addition and subtraction of fractions with unequal denominators referring to the same whole using objects and pictorial models and properties of operations;</p> <p>3K) add and subtract positive rational numbers fluently; and</p>  |
| <p><b>Quarter 2: Numbers and Operations – Intro Algebraic Reasoning. Intro Geometry and Measurement</b></p> <p>1A) apply mathematics to problems arising in everyday life, society, and the workplace;</p> <p>3) Number and operations. The student applies mathematical process standards to develop and use strategies and methods for positive rational number computations in order to solve problems with efficiency and accuracy.</p> <p>4) Algebraic reasoning. The student applies mathematical process standards to develop concepts of expressions and equations. Scholars use or generate expressions and equations to solve problems involving the four operations.</p> <p>6) Geometry and measurement. The student applies mathematical process standards to understand, recognize, and quantify volume. Students apply their understanding of measurement to select appropriate units for</p> | <p>43 Periods<br/>2365 Minutes</p> | <p>1A) apply mathematics to problems arising in everyday life, society, and the workplace;</p> <p>1B) use a problem-solving model that incorporates analyzing given information, formulating a plan or strategy, determining a solution, justifying the solution, and evaluating the problem-solving process and the reasonableness of the solution;</p> <p>1C) select tools, including real objects, manipulatives, paper and pencil, and technology as appropriate, and techniques, including mental math, estimation, and number sense as appropriate, to solve problems;</p> <p>1D) communicate mathematical ideas, reasoning, and their implications using multiple representations, including symbols, diagrams, graphs, and language as appropriate;</p> <p>1E) create and use representations to organize, record, and communicate mathematical ideas;</p> <p>1F) analyze mathematical relationships to connect and communicate mathematical ideas; and</p> <p>1G) display, explain, and justify mathematical ideas and arguments using precise mathematical language in written or oral communication.</p> <p>3A) estimate to determine solutions to mathematical and real-world problems involving addition, subtraction, multiplication, or division;</p> <p>3H) represent and solve addition and subtraction of fractions with unequal denominators referring to the same whole using objects and pictorial models</p> |

52

|  |                                       |   |
|--|---------------------------------------|---|
| measuring perimeter, area, and volume in specific problem contexts. Students use a variety of representations to build connections between direct measurement of perimeter, area, and volume to the use of related formulas.                                 |                                       | <p>and properties of operations;</p> <p>3I) represent and solve multiplication of a whole number and a fraction that refers to the same whole using objects and pictorial models, including area models;</p> <p>3J) represent division of a unit fraction by a whole number and the division of a whole number by a unit fraction using objects and pictorial models, including area models;</p> <p>3K) add and subtract positive rational numbers fluently; and</p> <p>3L) divide whole numbers by unit fractions and unit fractions by whole numbers.</p> <p>4A) identify prime and composite numbers;</p> <p>4B) represent and solve multi-step problems involving the four operations with whole numbers using equations with a letter standing for the unknown quantity;</p> <p>4E) describe the meaning of parentheses and brackets in a numeric expression;</p> <p>4F) simplify numerical expressions that do not involve exponents, including up to two levels of grouping;</p> <p>4G) use concrete objects and pictorial models to develop the formulas for the volume of a rectangular prism, including the special form for a cube (<math>V = s^3</math>); and</p> <p>4H) represent and solve problems related to perimeter and/or area and related to volume.</p> <p>6A) recognize a cube with side length of one unit as a unit cube having one cubic unit of volume and the volume of a three-dimensional figure as the number of unit cubes (<math>n</math> cubic units) needed to fill it with no gaps or overlaps if possible; and</p> <p>6B) determine the volume of a rectangular prism with whole number side lengths in problems related to the number of layers times the number of unit cubes in the area of the base.</p> |
| <p><b>Quarter 3: Algebraic Reasoning and Geometry Applications to Mastery – Intro to Data Analysis</b></p> <p>1A) apply mathematics to problems arising in everyday life, society, and the workplace;</p> <p>4) Algebraic reasoning. The student applies</p> | <p>43 Periods</p> <p>2365 Minutes</p> | <p>1B) use a problem-solving model that incorporates analyzing given information, formulating a plan or strategy, determining a solution, justifying the solution, and evaluating the problem-solving process and the reasonableness of the solution;</p> <p>1C) select tools, including real objects, manipulatives, paper and pencil, and technology as appropriate, and techniques, including mental math, estimation, and number sense as appropriate, to solve problems;</p> <p>1D) communicate mathematical ideas, reasoning, and their implications using multiple representations, including symbols, diagrams, graphs, and language as</p>   |

041



141

|  |                   |  |
|--|-------------------|--|
| <p>mathematical process standards to develop concepts of expressions and equations. The student is expected to:</p> <p>5) Geometry and measurement. The student applies mathematical process standards to classify two-dimensional figures by attributes and properties. The student is expected to classify two-dimensional figures in a hierarchy of sets and subsets using graphic organizers based on their attributes and properties.</p> <p>7) Geometry and measurement. The student applies mathematical process standards to select appropriate units, strategies, and tools to solve problems involving measurement. The student is expected to solve problems by calculating conversions within a measurement system, customary or metric.</p> <p>8) Geometry and measurement. The student applies mathematical process standards to identify locations on a coordinate plane.</p> <p>9) Data analysis. The student applies mathematical process standards to solve problems by collecting, organizing, displaying, and interpreting data. Scholars use appropriate graphic displays (e.g., table, bar graph, coordinate plane) to describe data based on the attributes of a particular data set.</p> |                   | <p>appropriate;</p> <p>1E) create and use representations to organize, record, and communicate mathematical ideas;</p> <p>1F) analyze mathematical relationships to connect and communicate mathematical ideas; and</p> <p>1G) display, explain, and justify mathematical ideas and arguments using precise mathematical language in written or oral communication.</p> <p>4C) generate a numerical pattern when given a rule in the form <math>y = ax</math> or <math>y = x + a</math> and graph;</p> <p>4D) recognize the difference between additive and multiplicative numerical patterns given in a table or graph;</p> <p>8A) describe the key attributes of the coordinate plane, including perpendicular number lines (axes) where the intersection (origin) of the two lines coincides with zero on each number line and the given point (0, 0); the x-coordinate, the first number in an ordered pair, indicates movement parallel to the x-axis starting at the origin; and the y-coordinate, the second number, indicates movement parallel to the y-axis starting at the origin;</p> <p>8B) describe the process for graphing ordered pairs of numbers in the first quadrant of the coordinate plane; and</p> <p>8C) graph in the first quadrant of the coordinate plane ordered pairs of numbers arising from mathematical and real-world problems, including those generated by number patterns or found in an input-output table.</p> <p>9A) represent categorical data with bar graphs or frequency tables and numerical data, including data sets of measurements in fractions or decimals, with dot plots or stem-and-leaf plots;</p> <p>9B) represent discrete paired data on a scatterplot; and</p> <p>9C) solve one- and two-step problems using data from a frequency table, dot plot, bar graph, stem-and-leaf plot, or scatterplot.</p> |
| <p><b>Quarter 4: Personal Financial Literacy</b></p>   | <p>43 Periods</p> | <p>1B) use a problem-solving model that incorporates analyzing given information, formulating a plan or strategy, determining a solution, justifying the solution, and</p>   |

|  |                     |  |
|--|---------------------|--|
| <p>1A) apply mathematics to problems arising in everyday life, society, and the workplace;</p> <p>10) Personal financial literacy. The student applies mathematical process standards to manage one's financial resources effectively for lifetime financial security.</p> | <p>2365 Minutes</p> | <p>evaluating the problem-solving process and the reasonableness of the solution;</p> <p>1C) select tools, including real objects, manipulatives, paper and pencil, and technology as appropriate, and techniques, including mental math, estimation, and number sense as appropriate, to solve problems;</p> <p>1D) communicate mathematical ideas, reasoning, and their implications using multiple representations, including symbols, diagrams, graphs, and language as appropriate;</p> <p>1E) create and use representations to organize, record, and communicate mathematical ideas;</p> <p>1F) analyze mathematical relationships to connect and communicate mathematical ideas; and</p> <p>1G) display, explain, and justify mathematical ideas and arguments using precise mathematical language in written or oral communication.</p> <p>10A) define income tax, payroll tax, sales tax, and property tax;</p> <p>10B) explain the difference between gross income and net income;</p> <p>10C) identify the advantages and disadvantages of different methods of payment, including check, credit card, debit card, and electronic payments;</p> <p>10D) develop a system for keeping and using financial records;</p> <p>10E) describe actions that might be taken to balance a budget when expenses exceed income; and</p> <p>10F) balance a simple budget.</p> |
|--|---------------------|--|

251



## Attachment 8: Proposed Discipline Policy

Provide the school's proposed discipline policy.

The foundations of the Cato Academy discipline policy are based on research by Dr. Rudolf Dreickurs an Adlerian psychologist who's life work who suggested that human misbehavior is the result of feeling a lack of belonging to one's social group. When this happens the child acts from one of four "mistaken goals": undue attention, power, revenge or avoidance (inadequacy). Dreikurs' overall goal was that students would learn to cooperate reasonably without being penalized or rewarded because they would feel that they are valuable contributors to the classroom.<sup>44</sup> This simple theory is the basis for student success and the root of discipline issues in a school. The power of relationships between the teacher and the scholar is the foundation of academic and life success of the scholar. To simplify the theory the Teddy Roosevelt quote; 'People won't **care** how much **you know** until they know how much **you care**.' opens the door to learning and is modeled in all aspects of Cato Academy.

Continuing with Dr. Dreickur's theory, Dr. William Glasser laid out Choice Theory<sup>45</sup> which is the idea that the behavior of children is related to five basic needs; survival, love and belonging, power and significance, freedom and autonomy, and fun.

Both Dreickurs and Glasser offer concrete techniques to be employed in the classroom to manage discipline issues and set the classroom up for a year of success. Some of these techniques include:

**1 Dr. Rudolf Druikers**

**WHY Children Act Out:**

1. Attention Getting
2. Power and Control
3. Revenge
4. Feeling Helpless or Inadequate

**Druikers Techniques for Teachers**

Rudolf Dreikurs was an Austrian psychiatrist and educator who developed psychology

Alfred Adler's system of individual psychology into a pragmatic method for understanding the purposes of reprehensible behavior in children and for stimulating cooperative behavior without punishment or reward.

1. Encourage **IMPROVEMENT** not **PERFECTION**
2. Encourage students to **HELP ONE ANOTHER**
3. Emphasize student **STRENGTHENS** and minimize **WEAKNESSES**
4. Help students **LEARN FROM MISTAKES**, as valuable lessons
5. Encourage **INDEPENDENCE** and student **RESPONSIBILITY**
6. Always speak in **POSITIVE** terms, never **NEGATIVE**
7. Be **OPTIMISTIC & ENTHUSIASTIC** - a positive outlook is contagious!

ETHOS LOGOS

Dr. Dreickurs

1. Always speak in positive terms, never be negative
2. Encourage students to strive for improvement, not perfection
3. Emphasize student strengths while minimizing weaknesses.
4. Help students learn from mistakes, which are valuable in learning

<sup>44</sup> Rudolf Dreickurs – Wikepeida - [https://en.wikipedia.org/wiki/Rudolf\\_Dreikurs](https://en.wikipedia.org/wiki/Rudolf_Dreikurs)

<sup>45</sup> William Glasser Institute – Choice Theory - <https://wglasser.com/our-approach/choice-theory/>

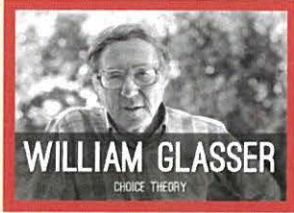
5. Encourage independence and the assumption of responsibility
6. Encourage students to help each other
7. Be optimistic and enthusiastic – a positive outlook is contagious.

## 2 Dr. William Glasser - Choice Theory

Choice Theory is the idea that the behavior of children is related to five basic needs: survival, love and belonging, power and significance, freedom and autonomy, and fun.

### Glasser's Techniques for Teachers

1. Stress student **RESPONSIBILITY**
2. Set classroom **RULES**
3. Accept **NO EXCUSES**
4. Help students make **VALUE JUDGEMENTS**
5. Suggest **ALTERNATIVES** and lay out **CONSEQUENCES**
6. Be **CONSISTENT** and **REVIEW** your **STRATEGY** often.



Following in the tradition of Alfred Adler, he has long been dedicated to teach our children how to develop their own healthy relationships with self and others; believing healthy, loving, and strong relationships are the core of happiness and mental health.

Dr. Glasser

1. Stress Student Responsibility
2. Set Classroom Rules
3. Accept NO EXCUSES
4. Teach Students to Make VALUE JUDGEMENTS
5. Suggests Reasonable ALTERNATIVES – lay out CONSEQUENCES
6. Be CONSISTENT and REVIEW your STRATEGY often

These philosophies are the basis for the discipline policy training for school leadership and teaching staff.

Once the foundations are understood then training will move to tactics. Cato Academy will use the following practical teaching outlines for day to day classroom management;

Harry Wong – First Day of School<sup>46</sup>

1. Two important key factors are:  
Room arrangement - Time management
2. Close proximity to a student – Circle the room  
Distraction Times; The beginning of class, Transitions, the end of class
3. Procedures answer the question, “What do I do when...?”

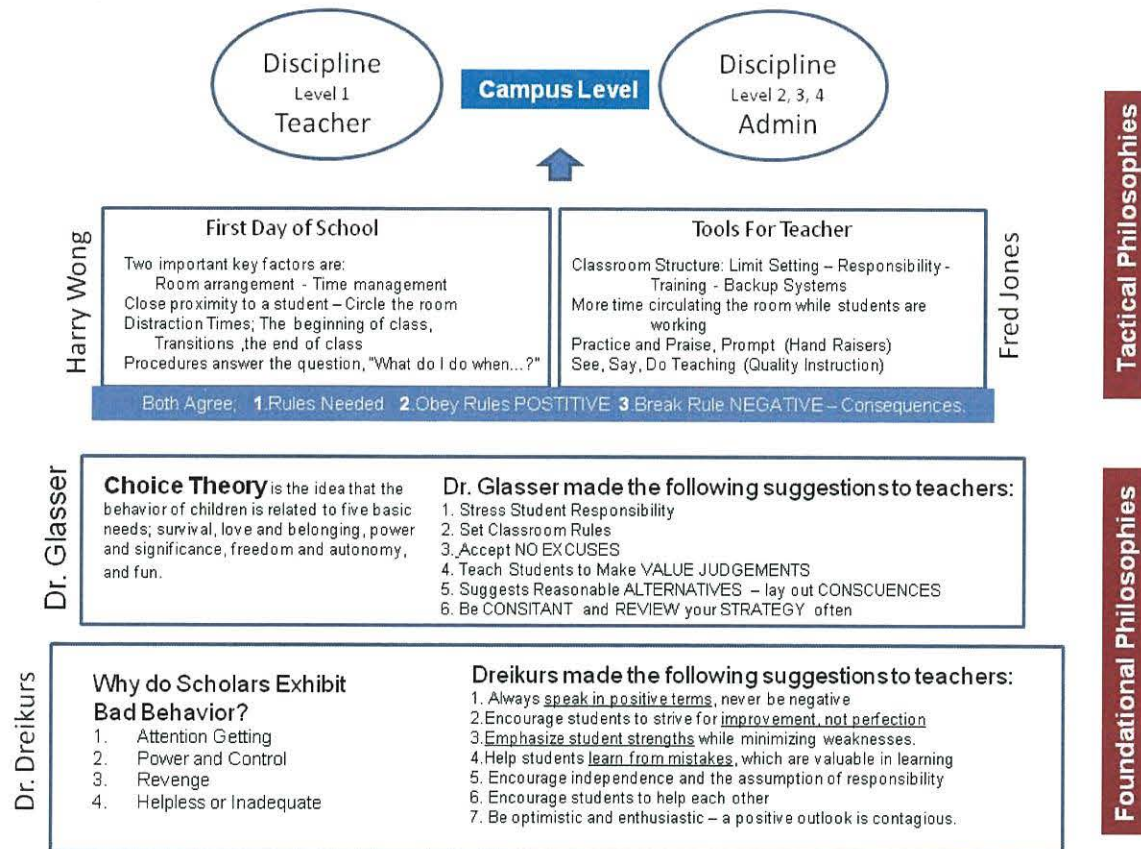
Fred Jones – Tools for Teachers<sup>47</sup>

<sup>46</sup> Effective Teaching – Harry Wong <https://www.effectiveteaching.com/>

<sup>47</sup> Tools for Teaching – Fred Jones <http://www.fredjones.com/tools-for-teaching>



1. Classroom Structure: Limit Setting – Responsibility - Training - Backup Systems
2. More time circulating the room while students are working
3. Practice and Praise, Prompt (Hand Raisers)
4. See, Say, Do Teaching (Quality Instruction)



## Framework for Cato Classical Academy Discipline Policy

The Cato Classical Academy Discipline Policy reflects who we are as an organization and remains compliant with the legal mandates of school discipline. We believe it to reflect:

**Our Mission:** Consistent with the values we pursue in our mission statement.

**Core Values:** Academic Excellence, Partnering with Families and Children & Learning

**Relational Discipline** highlighting the parent-teacher-scholar relationship to bring out the best in the child. Teachers and scholars developing meaningful relationships will only increase the scholar's sense of belonging to the school.

### Guiding Principal:

- Life lessons, accountability, responsibility and discipline are taught through natural consequences, rather than “punishment”.
- Teachers and scholars developing meaningful relationships will only increase the scholar's sense of belonging to the school.
- Developing positive relationships is based on the Golden Rule – “Treat others as you would want to be treated yourself”.

### School Operation:

Learning is fun in a safe, interactive, vibrant and challenging environment.

- Everyone has the responsibility to contribute to the greater good of the school community.
- Recognizing the value of discipline policies and procedures in order to meet the Mission of our school for all stakeholders.

Cato Academy's Discipline Policy is divided into levels of infraction. These cover most of the issues that will arise in a K8 school setting

### **LEVEL 1 Misconduct**

*Level 1 misconduct is dealt within the setting the behavior took place in. Staff discretion regarding natural consequences and/or referral to administration or communicating with parents is afforded. If a pattern of Level 1 misconduct develops, it escalates the misconduct to a Level 2 and is dealt with accordingly.*

*Examples: (not limited to):*

- Dress Code
- Minor Class Disruption
- Dishonesty
- Disrespect to staff, scholars, visitors and property
- *Rough-housing: pushing, shoving, wrestling*
- Inappropriate Display of Affection
- Profanity and/or inappropriate language or gestures
- Insubordination
- *Irresponsible in learning: tardies, excessive absences, incomplete homework, lack of effort and attentiveness, loitering in halls/bathrooms*

#### **Level 1 Natural and Logical Consequences - Responsible Party:** Teacher/Staff Member

*Natural consequences occur without any enforcement on the part of the adult. Often, allowing the natural consequence to occur will prevent a teacher/scholar argument and the child will learn the right lesson. Logical consequences involve action taken by the adult.*

*Level 1 misconduct will result in a scholar filling out a Habit of the Heart Reflection Form and a Level 1 teacher given consequences. The teacher will keep a copy of the form in the scholar folder.*

*Examples (not limited to):*

- 1. Friendly Reminder
- 2. Gentle Touch
- 3. *Use of Proximity - get closer to scholar*
- 4. Use the "Thinking Chair" (set amount of time)
- 5. *Practice following directions on Scholar time (Recess, specials, etc.)*
- 6. Hold in for lunch/recess (eat with teacher)
- 7. Go to "Buddy Teacher" classroom
- 8. Make up wasted time, during scholar time.
- 9. Uniform Violation results in loss of dress down
- 10. *Create plan for behavior refinement on their own time*
- 11. *Ignore scholar's behavior, when they want to do something, they do not get the opportunity to make up tardies minutes, on scholar time.*
- 13. Complete incomplete homework, receive no credit

*\*\*\*The aforementioned list contains just a few of the possible consequences for Level 1 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee.\*\*\**

### **LEVEL 2 Misconduct**



***Level 2 misconduct will result in a referral to school administration and consequences will be assigned accordingly. Parents/Guardians will receive communication regarding this incident.***

***Examples (not limited to):***

- Level 1 misconduct with staff referral
- Cheating
- *Inappropriate clothing*
- Defacing school property and/or equipment
- Plagiarism
- Racial slurs or derogatory comments
- Pushing and shoving with the intent to harm
- Defiance
- Theft
- Forgery
- Misconduct during events that include community participation

**Level 2 Natural and Logical Consequences: Responsible Party:** Administration

*Level 2 misconduct will result in administrative referral, scholar filling out a Habit of the Heart Reflection Form, scholar calling home to inform parent of misconduct, and a Level 2 consequence. The teacher will supply any and all previous documentation to administration and they will keep a copy of all documentation in scholar folder.*

***Examples (not limited to):***

- Any Level 1 consequence for an extended period of time
- Community Service
- *In School Suspension*
- *Short Term Out of School Suspension (1-2) Days*

*\*\*\*The aforementioned list contains just a few of the possible consequences for Level 2 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee\*\*\**

### **LEVEL 3 Misconduct**

***Level 3 misconduct will result in an IMMEDIATE referral to school administration and inquiry completed by administration designee to verify misconduct and determine consequence. Scholar, with presence of administrator, will call parent/guardian to inform of misconduct and possible consequence.***

***Examples: (not limited to)***

***Level 1 and/or Level 2 misconduct with staff referral or pattern of misconduct***

- Fighting
- Physical Aggression toward another
- *Cheating on an exam or major assignment*
- Defiance
- Use of vulgarity/swearing
- Theft
- Vandalism
- Weapon
- Safety Concern of a dangerous nature
- Sexual behavior or intimations of such

**Level 3 Natural and Logical Consequences: Responsible Party:** Administration

*Level 3 misconduct will result in IMMEDIATE administrative referral, scholar filling out a Habit of the Heart Reflection Form, scholar calling home to inform parent of misconduct, and a Level 3*

*consequence. The teacher will supply any and all previous documentation to administration and they will keep a copy of all documentation in scholar folder.*

*Examples (not limited to):*

- In School Suspension
- Short Term Out of School Suspension (3-5) Days
- Behavior Contract upon Return (at discretion of Principal)

*\*\*\*The aforementioned list contains just a few of the possible consequences for Level 3 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee and should be progressive in nature. \*\*\**

#### **LEVEL 4 Misconduct**

**Level 4 misconduct will result in an immediate referral to school administration and requires immediate investigation and possible law enforcement involvement, long-term suspension or expulsion.**

*Example (not limited to):*

- Possession of a Weapon with the Intent to Harm
- Endangerment or Aggravated Assault
- Physical and Verbal Abuse of School Employee
- Arson/Explosive Devices
- Bomb Threats or any threat that impedes and/or disrupts the educational process
- Bullying: Physical, Verbal, Emotional, Cyber or Sexual
- Intimidation
- Sexual Harassment of any school community member
- Harassment of any school community member based on gender, sexual orientation, race, religion or ethnicity
- Possession of Illegal Substances
- Use of Illegal Substance on School property
- Intent to Sell or Distribute Illegal Substances

#### **Level 4 Natural and Logical Consequences: Responsible Party: Administration**

*Level 4 misconduct will result in IMMEDIATE administrative referral, scholar filling out a Habit of the Heart Reflection Form, scholar calling home to inform parent of misconduct, and a Level 4 consequence. The teacher will supply any and all previous documentation to administration to be kept in scholar folder.*

*Examples (not limited to):*

- Long Term Suspension (5 or more Days)
- Expulsion

*\*\*\*The aforementioned list contains just a few of the possible consequences for Level 4 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee\*\*\**

#### **HARASSMENT AND BULLYING**

Cato Academy will employ the following definition for harassment and bullying: systematic and/or continued unwanted and annoying actions by a person or group, including threats and demands. This behavior includes, but is not limited to, verbal, physical, or sexual harassment. All forms of harassment and bullying are strictly prohibited and result in severe disciplinary consequences. Behavior must meet these criteria to be defined as harassment and bullying:

In accordance with Senate Bill 179, known as David's Law, as codified in Texas Education Code § 37.0832, "a single significant act or a pattern of acts by one or more students directed at another student that exploits an imbalance of power and involves engaging in written or verbal expression, expression through electronic means....that: (i) has the effect or will have the effect of physically



harming a student, damaging a student's property, or placing a student in reasonable fear of harm to the student's person or of damage to the student's property; (ii) is sufficiently severe, persistent, or pervasive enough that the action or threat creates an intimidating, threatening, or abusive educational environment for a student; (iii) materially and substantially disrupts the educational process or the orderly operation of a classroom or school; or (iv) infringes on the rights of the victim at school."

The disciplinary provisions for bullying and cyberbullying apply to (1) bullying that occurs on or is delivered to school property or to the site of a school-sponsored or school-related activity on or off school property; (2) bullying that occurs on a publicly or privately owned school bus or vehicle being used for transportation of students to or from school or a school-sponsored or school-related activity; and (3) cyberbullying that occurs off school property or outside of a school-sponsored or school-related activity. For discipline to be imposed for off-campus cyberbullying, the conduct must either interfere with a student's educational opportunities or substantially disrupt the orderly operation of a classroom, school, or school-sponsored or school-related activity.

The Cato Academy Governing Board will formulate a policy which includes procedures concerning bullying that prohibit bullying and retaliation. This policy will include procedures for providing notice of an incident of bullying to a parent or guardian of the alleged victim on or before the third business day after the date the incident is reported. The policy will establish steps a student can take to seek assistance and interventions in response to bullying. The policy will include a set of available counseling options for a student who is a victim of or a witness to bullying or who engages in bullying. Reporting procedures, including anonymous reporting, will be established in the board policy statement. The established policy will prohibit disciplinary measures against a student who, after an investigation, is found to be a victim of bullying, on the basis of that student's use of reasonable self-defense in response to the bullying. The policy will address discipline for bullying of a student with disabilities comply with applicable requirements under federal law, including the Individuals with Disabilities Education Act (20 U.S.C. Section 1400 et seq.).

Texas Education Code § 37.0052, will be included in the bullying policy which states that a student may be removed from class and placed in a disciplinary alternative education program or expelled if the student: (1) engages in bullying that encourages a student to commit or attempt to commit suicide; (2) incites violence against a student through group bullying; or (3) releases or threatens to release intimate visual material of a minor or a student without the student's consent. Intimate visual material is defined in Section 98B.001 of the Civil Practices & Remedies Code as visual material that depicts a person with the person's intimate parts exposed engaged in sexual conduct. It is also now a criminal offense under Penal Code 42.07 to harass someone via electronic communication if the offense was committed against a child under 18 years of age with the intent that the child to commit suicide or engage in conduct causing serious bodily injury to the child.

The principal of a public primary or secondary school, or the principal's designee, may make a report to law enforcement if, after an investigation is completed, the principal has reasonable grounds to believe that a student engaged in conduct that constitutes an assault under Penal Code § 22.01 or harassment under Penal Code § 42.07(a)(7).

Each school year, the Cato Academy Principal will submit a report to the Governing Board that includes the number of conduct and discipline code violations at the school. Included in this report is the number of incidents and the actions taken in response to those incidents for several types of violations. Reporting includes behaviors that are detrimental to the safety of other students or school personnel, including but not limited to incidents of bullying...and other behavior that creates a threat of physical harm to the student or to other students. The school admin team will monitor annual results on how the culture is performing at the school and review any reported issues of bullying.

#### **In-School Suspension**



In School Suspension is used when a child continues to misbehave or disregards school expectations. While on in-school suspension, we hope to remove all distractions so that the child can focus strictly on academics. The parents will be notified when the decision to invoke in-school suspension is made. The parent/guardian may be expected to come to school for a conference within 48 hours if their child is placed on in-school suspension. The length of the in-school suspension is directly related to the offense, whether the scholar has taken responsibility for their actions, and potentially whether a parent has come up for a conference.

A scholar on ISS will not be permitted to:

- Attend field trips
- Eat lunch in cafeteria
- Attend class with peers
- Participate in recess, PE, Art, Music or Language class
- Participate in after-school sports, music, or enrichment programs

### **Procedures for Short Term Suspensions**

A short-term suspension is a denial to a scholar of the right to attend school and to take part in any school function for any period of time up to and including ten cumulative school days.

*Step 1:* The scholar will receive notice, written or oral, of the reason for suspension and the evidence the school authorities have of the alleged misconduct.

- After having received notice, the scholar will be asked for an explanation of the situation.
- The authorized School personnel involved shall make reasonable efforts to verify facts and statements prior to making a judgment.

*Step 2:* Provided that a written record of the action taken is kept on file, authorized School personnel may:

- Suspend the scholar for up to ten (10) days.
- Choose other disciplinary alternatives.
- Exonerate the scholar.
- Suspend the scholar for ten (10) days pending a recommendation that the scholar be given a long-term suspension or expulsion or both.

When suspension is involved:

- A parent must be notified before the scholar is allowed to leave campus. If no parent contact can be made, the scholar may be isolated until dismissal time and then given a written message to the parents.
- A letter to the parents will be written within a reasonable time to explain the terms (including the possibility that a long-term suspension and/or expulsion is being recommended) and reasons for the suspension and to request a meeting prior to the scholar returning to school.

No appeal is available from a short-term suspension and is provided at the discretion of the Principal.

### **Procedures for Long-Term Suspensions and Expulsions**

A long-term suspension is a denial to a scholar of the right to attend school and to take part in any school function for any period of time equal to or exceeding eleven cumulative school days. An expulsion is the denial to a scholar of the right to attend school and to take part in any school function permanently.

When a scholar commits an offense that is eligible for long-term suspension or expulsion, the school shall (not necessarily in this order):

#### ***Investigation***

- Notify the scholar of the charge(s)
- Accept information from the scholar and other persons who have knowledge of the incident. The scholar involved shall have the opportunity to express his/her side of the problem.
- Determine the accuracy of the charge(s) based on this information.



- Send written notification, by the end of the school day when possible, to the parent or guardian, or arrange for notification to be hand-delivered or sent certified mail within one school day informing him or her of the disciplinary infraction, the date and time for the Suspension or Expulsion Hearing, the right to appeal the outcome of the Suspension or Expulsion Hearing, and the scholar's status pending the hearing. A written notification of the outcome of the Bullying/Harassment A copy of this notification is filed in the scholar's cumulative folder in the school.
- The Principal will generally schedule the Suspension or Expulsion Hearing within two school days of the disciplinary infraction. The scholar may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The hearing will be conducted by the Principal. The hearing shall be closed to the public and may include the presentation of evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Principal will normally notify the parent or guardian of the discipline decision within one school day of the Suspension or Expulsion Hearing.

### ***Implementation***

Once the Principal or Principal's Designee have determined that a long-term suspension or expulsion is warranted, he/she shall proceed as follows:

- Inform the scholar of the decision and the reason(s).
- Notify the parent by telephone or in person.
- Send written notification, within one school day of the Suspension or Expulsion Hearing to the parent or guardian, or arrange for notification to be hand-delivered or sent certified mail within 24 hours informing him or her of the suspension, the reason for the suspension or expulsion, the length of the suspension, the right to appeal, and the scholar's right to return to school at the end of the suspension, and any conditions for that return (a re-entry conference with the parent or legal guardian is mandatory). A copy of this notification is filed in the scholar's cumulative folder in the school.

### ***Special Notes Concerning Suspension***

#### ***Counting of Suspension Days***

Suspension days shall be counted as follows:

- The day the scholar left school should be counted as a part of the suspension, provided he/she was denied class participation before 12 noon of that day.
- The suspension shall terminate at midnight on the day listed as the last day of suspension.
- Times when school is not officially scheduled are not to be counted as part of the suspension time. (Should school be cancelled for any reason during a scheduled suspension day, the suspension will lengthen to include the time school was actually in session.)

#### ***Make Up Work for Suspension***

Scholars who are suspended shall be offered make-up work assignment. It is the responsibility of the parent/guardian to contact the school and make arrangements for the receipt and return of all assignments. In the case of long-term suspensions, unless other arrangements are made, teachers are to give work in two-week increments, and scholars must complete and return work before receiving additional work. All IDEA mandates will be followed for scholar with disabilities.

#### ***Participation at School and School Related Activities***

Scholars who have been suspended from school shall not be eligible to participate in any school functions for the entire period of their suspension.

#### ***Repeat Offenders***



Scholars who continue to be suspended whether in-school or short or long term may be expelled from Cato. Scholars who have been suspended for 3 separate offenses or more times in their entire duration at Cato may be expelled.

### **Discipline for Scholars with Disabilities (Qualifying under IDEA or 504)**

#### ***Suspension for ten days or less.***

Short-term suspension (ten [10] days or less) may be used for special education scholars for disciplinary reasons on the same basis as for a regular education scholar. (It is not considered a change of placement.)

*Step 1:* The scholar will receive notice, written or oral, of the reason for suspension and the evidence the school authorities have of the alleged misconduct.

- After having received notice, the scholar will be asked for an explanation of the situation.
- The authorized School personnel involved shall make reasonable efforts to verify facts and statements prior to making a judgment.

*Step 2:* Provided that a written record of the action taken is kept on file, authorized School personnel may:

- Suspend the scholar for up to ten (10) days.
- Choose other disciplinary alternatives.
- Exonerate the scholar.
- Suspend the scholar for ten (10) days pending a recommendation that the scholar be given a long-term suspension or expulsion or both.

When suspension is involved:

- A parent must be notified before the scholar is allowed to leave campus. If no parent contact can be made, the scholar may be isolated until dismissal time and then given a written message to the parents.
- A letter to the parents will be written within a reasonable time to explain the terms (including the possibility that a long-term suspension and/or expulsion is being recommended) and reasons for the suspension and to request a meeting to solicit their help.

No appeal is available from a short-term suspension.

#### ***Suspension for over ten days***

If a special education scholar is recommended for a suspension of more than ten (10) days during the school year (a possible change in placement), a manifestation determination conference must be held.

*Steps 1 and 2 above apply*

*Step 3:* A recommended suspension of a special education scholar for more than ten (10) consecutive days, or a series of suspensions totaling more than ten (10) days, may constitute a change of placement and shall require a manifestation determination conference. Such a conference will be for the purpose of determining whether or not the is a manifestation of the scholar's disability and whether or not the school followed the scholar's IEP and/or 504.

*Step 4:* If the offense is not a manifestation of the scholar's disability and the school was in compliance with the scholar's IEP or 504, the scholar may be suspended by following the School policies for scholars in general, provided that educational services are continued during the period of disciplinary removal for a scholar with a disability qualified under the Individuals with Disabilities Education Act (IDEA). A scholar with a disability qualified for educational services under the Americans with Disabilities Act or Section 504 of the Rehabilitation Act of 1973, and not qualified under IDEA, may be suspended or expelled from school, and educational services will not be provided, if nondisabled scholars in similar circumstances do not continue to receive educational services.

*Step 5:* If the behaviors are a manifestation of the disability of the scholar, the School may not extend the suspension of the scholar beyond the initial ten (10) school days.



## **Right of Appeal – Grievance Policy**

### ***Right of Appeal***

A parent or guardian may make a written request to the school Principal to appeal a long-term suspension or expulsion within one school day of receiving notification of the suspension. The Principal will generally schedule the Appeal Hearing within two school days of receiving the written request. The scholar may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The hearing will be conducted by the Principal. The hearing shall be closed to the public and may include the presentation of evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Principal will normally notify the parent or guardian of the decision within one school day of the Appeal Hearing. If the suspension is overturned, the cumulative record of the scholar and any other school-maintained records will reflect that conclusion. If a parent or guardian fails to appear for a scheduled appeal hearing, the right to appeal is waived, and the original disciplinary decision will stand.

If the suspension or expulsion is upheld and the parent or guardian wants to continue the appeal process, the parent or guardian may make a written request to the Cato Board Designee, stating why the suspension should be reversed or modified within two school days receiving the Cato Discipline Committee Appeal Hearing decision. The Hearing Officer will generally schedule the Appeal Hearing within two school days of receiving the written request. The scholar may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The hearing will be conducted by the Cato Board Discipline Committee. The hearing shall be closed to the public and may include the presentation of evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Cato Board Designee will normally notify the parent or guardian of the decision within one school day of the Appeal Hearing. If the suspension or expulsion is overturned, the cumulative record of the scholar and any other school-maintained records will reflect that conclusion. If the Cato Board Discipline Committee upholds the suspension, the suspension shall be imposed, and such decision will be final. If a parent or guardian fails to appear for a scheduled appeal hearing, the right to appeal is waived, and the original disciplinary decision will stand.

## **Attachment 9: Evidence of Community Support**

Provide evidence of support from intended community partners such as letters of intent/commitment, memoranda of understanding, and/or contracts J316.

During the community outreach period, the group held a number of planning meetings to develop the Mission Statement, Values Statements and determine what type of school to launch. In speaking with parents, families, pastors, business members of the area and community leaders the Governing Board determined there was sufficient demand for the proposed school.

With the addition of Mr. Higgins, a number of community listening and feedback meetings including presentations, meetings and listening sessions with Representative Ed Thompson – Texas Legislature, Carol Artz-Bucek, President and CEO of The Pearland Chamber of Commerce, Dr. John Kelly, Superintendent of Pearland ISD, Amy Bowman Director, Tottenberrys Early Education, Sharon D Baker, Director Back to Basics Pearland, Cynthia Chambers, Center Director, R Kids Learning Academy, Melissa Bagwell, Center Director, Kidde Academy of Pearland, Katie Boughal, Park Naturalist and Education Coordinator for the Delores Fenwick Nature Center, Pearland Parks, and Recreation Department. Jason Omara, Resource Development Manager (Sponsorship Opportunities), City of Pearland. Mychal Mitchell, Special Events Coordinator, City of Pearland. Kyle Livesay, Recreation Program Manager Pearland Parks and Recreation. Pearland Alvin Rotary Club. E Richard Vaughan Rd. Vaughn Interests.



## Attachment 10: Bylaws

Provide the proposed bylaws for the charter school's governing board or the existing bylaws of the sponsoring entity.

### **BYLAWS OF CLASSICAL CHARTER SCHOOLS OF TEXAS, INC.**

WHEREAS, the initial Board of Directors of Classical Charter Schools of Texas, Inc. (the "Corporation") caused to be filed with the Texas Secretary of State a Certificate of Formation for the organization of the Corporation NOW, THEREFORE:

BE IT RESOLVED by the Board of Directors of the Corporation, that these Bylaws will govern its affairs in pursuit of its declared purposes.

#### **PREAMBLE CORPORATE PURPOSE, OBJECTIVES AND DEDICATION OF ASSETS**

The Corporation shall enrich, strengthen, enhance, and support the advancement of education and school choice in Texas by engaging in fundraising as it deems appropriate in furtherance of the purposes as provided in the Certificate of Formation. The Corporation shall also seek to own and operate a Public Charter School (the "School") as provided under the Texas Education Code for the benefit of students in Texas, providing educational opportunities, programs and such other functions as it deems appropriate in furtherance of the purposes as provided in the Certificate of Formation. This Corporation is formed for charitable purposes, and it will be nonprofit and nonpartisan. No substantial part of the activities of the Corporation will consist of the publication or dissemination of materials or statements with the purpose of attempting to influence legislation, and the Corporation will not participate or intervene in any political campaign on behalf of or in opposition to any candidate of public office. The Corporation will not engage in any activities or exercise any powers that are not in furtherance of the charitable purposes described in the Certificate of Formation.

The properties and assets of the Corporation are irrevocably dedicated to charitable and educational purposes. No part of the net earnings, properties or assets of this corporation, on dissolution or otherwise shall inure to the benefit of any private person, or any director or officer of this Corporation. On liquidation or dissolution, all properties, assets and obligations will be distributed or paid over to an organization dedicated to charitable and educational purposes that is tax-exempt pursuant to Internal Revenue Code Section 501(c)(3) as amended or as otherwise required by state and federal law.

The Corporation, in all its activities and programs, shall not discriminate on the basis of sex, national origin, ethnicity, religion, disability or any other prohibited manner.

#### **ARTICLE ONE NAME, OFFICE AND SEAL**

1.01 Name. The name of the Corporation is "Classical Charter Schools of Texas, Inc."

1.02 Office. The principal office of the Corporation will be located at 7918 Broadway Street #106, Pearland, Texas 77581.

1.03 Seal. The corporate seal of the Corporation, if any, will be inscribed with the Corporation name and year and place of its incorporation.

## ARTICLE TWO MEETINGS & RECORDS

2.01 Regular Meetings, Frequency and Place. Regular meetings of the Board of Directors shall be held on at least a quarterly basis at such places and at such times as the Board may determine.

2.02 Annual Meeting. The Annual Meeting of the Board of Directors shall be held on the occasion of its First (1st) Quarterly meeting each and every fiscal year, or as otherwise determined by the Board.

2.03 Special Meetings. Special meetings of the Board of Directors may be called by the Chairman, Secretary, or by any one or more Board members with the consent of the Chairman or Secretary, which consent will not be unreasonably withheld, for any purpose not otherwise proscribed by law, grant or loan condition, or the Certificate of Formation, to transact any business described in the call for the special meetings.

### MEETINGS RELATING TO CHARTER SCHOOLS

2.04 Charter School Meetings. When conducting business relating in any way to the operations or affairs of any of the Corporation's public charter schools, meetings of the Board or any Board Committee shall be conducted in accordance with provisions of the Texas Education Code and Chapter 551 of the Texas Government Code, and the Board of Directors shall be subject to the requirements of the Texas Open Meetings Act, including the following provisions: At no time shall a quorum of the full Board meet to deliberate any issue or business of the Corporation without posting notice of a meeting as set forth below. Directors shall normally attend all meetings in person, but may attend by alternate means only if circumstances warrant and expressly in accordance with the Texas Open Meetings Act.

(a) Closed Meetings: The Board may meet in a meeting closed to the public to deliberate on those matters specified in the Texas Open Meetings Act as proper for closed meetings, including but not limited to consultation with attorney, real estate, prospective gifts or donations, personnel matters, security personnel or devices, discipline of a student and complaints against an employee unless the student or employee respectively requests an open meeting.

(b) Emergency Meetings: In the event of an emergency as defined in the Texas Open Meetings Act, a meeting may be conducted by telephone conference call. If a



meeting involves telephonic participation, the telephonic participation must be by conference call in which all persons participating can be heard by all other participants and the public.

(c) Video Conferencing: Meetings may also be conducted by videoconference call if the presiding officer is present at one location open to the public and the notice of the meeting states the intent to have the presiding officer present. Audio and video must be simultaneously available to the public and the meeting shall be audio recorded. Each participant shall be clearly visible and audible to other participants and to members of the public in attendance. The meeting must meet other prerequisites of the Texas Open Meetings Act.

2.05 Notice for Charter School Meetings. When conducting business related to the operations or affairs of the Corporation's public charter schools, the following shall apply: Notice of all meetings of the Board of Directors, except as otherwise provided by state law, regulation, will be delivered by mail postmarked, electronic facsimile or e-mail transmission to each Director at least 72 hours before the time of the meeting.

(a) Posting of Notice: In addition, notice to the public of any meeting shall be posted at the administrative offices of the Corporation in a location convenient to the public at least 72 hours before the time of such meeting.

(b) Emergency Notice: Emergency meetings as allowed under the Texas Open Meetings Act may be posted up to one hour before such meeting. At such an emergency meeting, the Board may only address the matter requiring the emergency action. The notice must identify the nature of the emergency and the urgent public necessity requiring emergency action.

(c) Internet Posting: Notice and the agenda of all meetings of the Board of Directors shall also be posted on the Corporation's Internet website for the charter schools, if any, concurrently with the notice posted at the administrative offices, or as otherwise required and authorized by the Texas Open Meetings Act.

(d) Closed Meetings: The agenda shall clearly state whether the Board intends to convene in a closed meeting and shall identify separately each matter to be deliberated by the Board in the closed meeting and whether the Board may take action on any such matter upon returning to the open meeting. The Secretary shall note the times in the open meeting that the Board convenes to and adjourns from the closed meeting.

2.06 Charter School Meeting Order of Business. When conducting business related to the operations or affairs of the Corporation's public charter schools, the following shall apply: At regular meetings of the Board, the order of business shall be established in an Agenda approved by the Chairman and as presented in the notice of the meetings. However, the Chairman may modify the order of business. The agenda shall identify all matters to be presented to and considered by the Board. Matters not disclosed in the

agenda and meeting notice available to the public shall not be deliberated or be considered by the Board, except as permitted by the Texas Open Meetings Act.

## CORPORATE BOARD MEETINGS NOT RELATING TO CHARTER SCHOOLS

2.07 Non-Charter Meetings. When conducting any other Corporate business not related, in any way, to the operations or affairs of the Corporation's public charter schools, or prior to award and execution of a charter contract, Board meetings shall be conducted in accordance with provisions of Chapter 22 of the Texas Business Organizations Code, the Certificate of Formation and these bylaws. The Secretary shall cause to be mailed at least forty-eight hours in advance or sent by electronic means at least twenty-four (24) hours in advance to every director at his/her address (email address) of record with the Corporation, a notice stating the time and place of every meeting. Notice of such meetings shall state the reasons that such meeting has been called and the business to be transacted at such meeting.

2.08 Board Action By Unanimous Written Consent. When conducting any Corporate business not related, in any way, to the operations or affairs of the Corporation's public charter schools, or prior to award and execution of a charter contract, the Board may take any action required or permitted to be taken at a meeting of the Board of Directors of committee of the Corporation, without an actual meeting if a consent, in writing, setting forth the action to be taken, is signed by all directors or committee members entitled to vote (unanimous written consent) subject to all requirements of applicable law. The unanimous written consent for any such action by the Board or committee must state the date of each Director's or committee member's signature and memorialize the action to be taken. The written consent of each of the Directors or committee members must be delivered to the Corporation no later than the tenth (10<sup>th</sup>) day after the earliest date of consent and must be delivered to the Chairman or Secretary of the Board. Delivery must be by hand delivery or by certified or registered mail, return receipt requested.

## MEETINGS & RECORDS GENERALLY

2.09 Corporate Records. The Corporation will maintain at its principal office all financial books and records of account, all minutes of the Board meetings and committee meetings, the list of Directors, and copies of all other material Corporate records, books, documents and contracts as required by Texas law. All such records will be made available for inspection at any reasonable time during usual business hours for any lawful purpose to any officer, Director, or person authorized by law or the Board to inspect such records, and the Corporation's records will also be available to the extent required by the Texas Public Information Act where applicable for public inspection and copying as promptly as possible as required by such act. Upon leaving office, each Director, officer or agent of the Corporation will turn over to the Chairman in good order any Corporation monies, books, records, minutes, lists, documents, contracts or other property of the Corporation in his or her custody or control.



2.10 Quorum. The presence of a majority of the members shall constitute a quorum and shall be necessary to conduct the business of the Corporation except as otherwise provided in Article 2.14 herein. Any Board vacancies shall not be counted in determining a majority called for by these Bylaws.

2.11 Order of Business. Board meetings shall generally proceed with the following order of business:

- Roll Call and Establishment of a Quorum
- Public Comments
- Reading and Approval of Minutes of Preceding Meeting(s)
- Reports of Committees
- Reports of Officers
- Old and Unfinished Business
- New Business
- Adjournments

The Board of Directors may, by majority vote, adopt a different agenda order.

2.12 Record of Board Action. All motions and resolutions of the Board will be written or recorded in the minutes of the Board and certified copies will be placed in a journal of proceedings of the Board. Such records shall be maintained in accordance with state law and Article 2.09 herein.

2.13 Voting. All matters at any meeting of the Board of Directors or any of its designated committees, except as otherwise provided in these Bylaws, the Certificate of Formation, or as permitted by law, will be decided by a vote of a majority of the Directors present at or lawfully participating in the meeting as permitted by the Texas Open Meetings Act. If a quorum of the Board is present or lawfully participating in the meeting, the affirmative vote of a majority of the Board of Directors will be the act of the body corporate, unless the vote of a greater number is required by statute, regulation, the Certificate of Formation, or these Bylaws. Any Director may request a roll call vote on any motion or resolution. Directors may not vote by proxy or secret ballot.

2.14 Fundamental Actions. In accordance with Section 22.164 of the Texas Business Organization Code, the following actions of the Board of Directors are fundamental actions that shall require the affirmative vote of the majority of directors then serving on the Board:

- (a) Amendment of a certificate of formation [or articles of incorporation];
- (b) Voluntary winding up under Chapter 11;
- (c) A revocation of a voluntary decision to wind up under Chapter 11;
- (d) A cancellation of an event requiring winding up under Chapter 11;
- (e) A reinstatement under Section 11.202;
- (f) A distribution plan under Section 22.305;
- (g) A plan of merger under Subchapter F;

- (h) A sale of all or substantially all of the assets of the Corporation;
- (i) A plan of conversion under Subchapter F; or
- (j) A plan of exchange under Subchapter F

2.15 Compensation. Except as provided in this section, no Director will receive directly or indirectly any salary, compensation or gift from the Corporation, except as authorized by state law. The Directors of the Corporation will serve as such without salary. No Director will be entitled to any dividend or any part of the income or principal of the Corporation, or to share in the distribution of the assets upon dissolution of the Corporation. The Board of Directors may authorize the payment by the Corporation of the reasonable, documented and allowable expenses incurred by a Director in performance of his or her duties in accordance with state and federal law.

2.16 Parliamentary Procedure. For all matters of parliamentary procedures, the Board and any Committees established by the Board, shall be guided by *Robert's Rules of Order Newly Revised*, 11th ed. (Cambridge, Mass.: Perseus Publishing, 2011).

### ARTICLE THREE DIRECTORS

3.01 Management. The activities, affairs, property and powers of the Corporation will be managed, directed, controlled or exercised by and vested in the Board of Directors.

3.02 Number And Qualifications. The Board of Directors will consist of no fewer than three (3) persons.

3.03 Removal. Any Director who fails to attend three (3) consecutive meetings may be asked to resign from office by resolution of the Board of Directors. The Secretary will notify Directors when they have missed three (3) regular consecutive meetings. Absences may be formally excused by vote of the Board. The Secretary will certify a Director's excessive absence to the Chairman. Any Director may also be removed with or without cause upon a two-thirds (2/3) majority vote of all the remaining directors for removal. However, the Chairman of the Board may only be removed upon a two-thirds (2/3) majority vote of all the remaining directors for good cause.

3.04 Term. The Directors shall serve for three-year terms, which may be renewed indefinitely by each respective Director, subject to Articles 3.03 and 3.06 herein.

3.05 Vacancy. The Chairman of the Board will appoint Directors to fill vacancies. Each Director appointed or designated to fill a vacancy on the Board of Directors will hold office for the remainder of the term of the Board of Directors. A vacancy occurring on any committee may be filled by the Board of Directors for the remainder of the term of the position.

3.06 Resignation. Any director or officer may resign from the Corporation by delivering a written letter of resignation to the Chairman of the Board.



3.07 Compensation. Except as provided in this section, no Director will receive directly or indirectly any salary, compensation or gift from the Corporation, except as authorized by state law. The Directors of the Corporation will serve as such without salary. No Director will be entitled to any dividend or any part of the income or principal of the Corporation or to share in the distribution of the assets upon dissolution of the Corporation. The Board of Directors may authorize the payment by the Corporation of the reasonable, documented and allowable expenses incurred by a Director in performance of his or her duties in accordance with state and federal law.

#### ARTICLE FOUR OFFICERS

4.01 Officers. The officers of the Corporation will consist of the Chairman of the Board, a Vice-Chairman of the Board, and a Secretary/Treasurer and any other officers that the Board may establish and designate by resolution adopted by a majority of vote of the whole Board.

4.02 Appointment. The officers of the Corporation will be appointed each year by the Chairman of the Board at its annual meeting.

4.03 Chairman. The Chairman of the Board will preside at all meetings of the Board of Directors. The Chairman will have other powers and duties not inconsistent with these Bylaws as may be assigned by the Board. The Vice-Chairman will have the powers and duties of the Chairman in his absence.

4.04 Secretary. A Secretary will act under the direction of the Chairman and in his absence, have the duties and powers of the Chairman. A Secretary will have other duties and powers as the Chairman of the Board of Directors may assign. The Secretary will have the general powers and duties usually vested in such office of a Corporation, including keeping all records, documents and the corporate seal at the principal office of the Corporation; affixing the corporate seal to any instrument requiring it and to attest the same by his or her signature when authorized by the Board of Directors or after the instrument has been signed by the Chairman, Vice-Chairman or other authorized officer or agent; keeping the minutes of the meetings of the Board of Directors, the Executive and other committees of the Board of Directors, the Executive and other committees of the Corporation to be recorded in one or more books provided for that purpose, with the time and place, how they were called or authorized, the notice given, the names of those present, and the proceedings therein; and issuing proper notices in accordance with these Bylaws. The Secretary will have such other powers and duties not inconsistent with these Bylaws as may be assigned by the Board of Directors or the Chairman.

4.05 Treasurer. The Treasurer will be responsible for all funds and securities of the Corporation and will have the general powers and duties usually vested in such office of a Corporation, including receiving and documenting all monies due and payable to the Corporation; depositing all monies received in the name of the Corporation in a depository

designed by the Board, disbursing monies of the Corporation under the direction or orders of the Board; entering regularly in the books kept by the Treasurer a complete and accurate account of all monies received and disbursed by the Corporation; rendering a statement of the financial accounts of the Corporation to the Board as requested; exhibiting the books of the financial accounts of the Corporation to the Board as requested; exhibiting the books of account in his custody to any Director upon request; and submitting a full financial report to the Board of Directors at the annual meetings. The Treasurer will have such other powers and duties not inconsistent with the Bylaws as may be assigned by the Board of Directors or the Chairman.

4.07 Other Offices. The Board of Directors may create by resolution other offices as it deems necessary to serve the Corporation, who need not be directors, to serve as officers or agents of the Corporation.

## ARTICLE FIVE COMMITTEES

5.01 Committees. Designated committees may be established by the Chairman of the Board or the Board to perform the duties and functions assigned in furtherance of Board objectives. Any committee may include one or more Directors from the Board. The Chairman of the Board or its designee will appoint the members, officers, or others to committee positions. The rules of procedure of any committee may be set by the Board. Any committee may be abolished, or any committee member removed for any reason and at any time by the Board of Directors.

5.02 Notice. Any committee meeting at which a quorum of the Board of Directors attends, or at which a deliberation as defined by the Open Meetings Act takes place, shall give written notice of the meeting and shall keep and deliver a copy of minutes of its proceedings to the Secretary of the Board, in accordance with the Texas Open Meetings Act. Committees that are advisory only without delegated authority or power may not fall under the Open Meetings Act. If, however, a committee has delegated authority or it has power to make final decisions, to adopt rules regarding school business, or if the Board of Directors usually approves its recommendations in full, then it must meet in accordance with the Open Meetings Act.

5.02 Records. Each committee will keep and deliver a copy of minutes of its proceedings to the Secretary of the Board and will report briefly on its activities at each Board meeting.

## ARTICLE SIX DEPOSITS, CHECKS, LOANS AND CONTRACTS

6.01 Depositories. All funds of the Corporation not otherwise employed will be deposited in banks or other depositories designated by the Board of Directors and in accordance with state law.



6.02 Transactions. All checks, drafts, endorsements, notes and evidences of indebtedness of the Corporation will be signed by such officers or agents and all endorsements for deposits to the credit of the Corporation will be made as authorized by the Board of Directors.

6.03 Loan Or Grant Authority. No loans or advances will be contracted on behalf of the Corporation, and no note or other evidence of indebtedness will be issued in its name, except as authorized by the Board.

## ARTICLE SEVEN CONTRACTS WITH DIRECTORS AND OFFICERS

7.01 Insider Dealing. Subject to any law, regulation, or contractual agreement of the Texas Business Organizations Code, no Director, officer or committee member will be interested directly or indirectly in any contract or program involving Corporation assets, relating to the operation conducted by it or in any contract for furnishing services or supplies to it, unless (a) the contract is authorized by a majority of Directors present at a meeting in which there is a quorum and vote without the interested Director's presence, (b) the facts and nature of the Director's interest is fully disclosed to the whole Board of Directors before the meeting in which the contract will be considered and (c) the Corporation could not have obtained a more advantageous arrangement with reasonable effort under the circumstances. Furthermore, in accordance with Texas law and commissioner rule, a transaction with a current or former board member or officer of the charter school, who served within 5 years of the transaction, may require an independent appraisal, audit and prior notice to the TEA for TEA's review and approval prior to entering into such transaction.

7.02 Insider Loans: No loans or grants will be made by the Corporation to its Directors, officers or committee members during their term of office. The Directors who vote for or assent to, and any officer who participates in, the making of a loan to a Director or officer will jointly and severally be liable to the Corporation for the amount of the loan until it is repaid.

## ARTICLE EIGHT INDEMNIFICATION OF DIRECTORS AND OFFICERS

8.01 Liability. A Director or committee member will not be required to furnish any bond or surety for his services as a Director or committee member and will not be liable for the act or omission of any other Director.

8.02 Indemnification. Any person made or threatened to be made a party to any action in court or other proceeding because he is or was a Director or committee member will be indemnified by the Corporation against any and all liability and the reasonable expenses, including attorney's fees, incurred in connection with the defense or settlement of the action, except where it is adjudged that the Director or committee member is liable for gross negligence, bad faith or willful misconduct in performing his duties. The right of

indemnification will not exclude any other right of the Director or committee member. INDEMNIFICATION UNDER THIS SECTION IS SUBJECT TO ANY AND ALL PROHIBITIONS, RESTRICTIONS AND LIMITATIONS IMPOSED BY LAW.

8.03 Insurance. The Board of Directors will have the power to purchase and maintain at the Corporation's expense insurance on behalf of the Corporation, the Board of Directors, and others.

#### ARTICLE NINE AMENDMENT OF BYLAWS

9.01 Amendment. Except as otherwise provided in the Certificate of Formation, and subject to the power of the Board to amend or repeal these Bylaws, these Bylaws may be altered, amended or repealed and new Bylaws may be adopted by a majority vote, provided that written notice setting forth in detail the proposed Bylaws revisions with explanations for the change is given at least three days previously. In the case of an emergency, which must be explained in the notice, two hours notice of a proposed amendment may be given to all Directors, and the Bylaws may be amended upon the unanimous vote of all Directors.

#### ARTICLE TEN MISCELLANEOUS

10.01 Fiscal Year. The fiscal year of the Corporation will begin on July 1 of each year and will end on June 30 of the next year.

10.02 Annual Report. The Treasurer shall obtain and will provide to the Board no later than 90 days after the close of the fiscal year a report containing the following information in appropriate detail.

- (a) The assets and liabilities of the Corporation as of the end of the fiscal year.
- (b) The principal changes in assets and liabilities during the fiscal year;
- (c) The revenues and receipts, both restricted and unrestricted to particular purposes, for the fiscal year.
- (d) The expenses or disbursements, for both general and restricted purposes, during the fiscal year;
- (e) The substantial activities and projects begun, in progress, and completed during the Fiscal year.
- (f) Such other information as may be requested by the Board.

The report will be accompanied by a report of an independent accountant, or in lieu of such report, the certificate of an authorized officer of the Corporation that such statements were prepared without audit from the books and records of the Corporation.



10.03 Federal Tax Filing. The officers of the Corporation will be responsible for ensuring timely annual filing of IRS Form 990 within the timeframes of IRS rules.

10.04 Construction. Whenever the context requires, the masculine will include the feminine and neuter, and the singular will include the plural, and vice versa. If any portion of these Bylaws is declared invalid or inoperative, then so far as is reasonable the remainder of these Bylaws will be considered valid and operative and effect will be given to the intent manifested by the portion held invalid or inoperative.

10.05 Statutory And Other Authority. These Bylaws are subject to and governed by any applicable federal or state laws and regulations, including pertinent local ordinances and the Certificate of Formation.

Dated: 1-11-20

  
Dr. Nick Ellen, Chair

**Once the corporation is established the Governing Board proposes to set up the following three committees (Academic, Financial, Governance) and provide each committee with a beginning scope of work as defined below:**

Academic Committee: The Academic Committee shall consist of at least one Director, the Superintendent and School Principal/Administrator. The Academic Committee shall meet at least four (4) times per school year. The purpose of the Board Academic Committee shall be to review school data, ensure academic expectations and goals are being met, and provide insight into instructional activities that meet the specific needs of the students.

As detailed under the school's academic performance plan, the school based Academic Accountability Committee (AAC) will review benchmark data, teacher observations, end of year STAAR testing and prepare a report for the Board Academic Committee. This report will provide insight into curriculum effectiveness, professional development plans and additional resources needed to address academic targets.

Each year, the Governing Board will, review a report from the Board Academic Committee end of year State of Texas, STAAR, assessment results and establish academic goals. These goals will review past academic data, analyze the schools data against their peers, the State of Texas average test results and incorporate any new policy or laws enacted by the State of Texas.

**Academic Oversight:** As part of the academic oversight role of the Governing Board, the members will understand the academic goals put forth in the Charter Contract and draft a board policy

statement on what academic success looks like at Cato Academy. The Superintendent will provide a training to the Governing Board on the academic accountability framework used by the State of Texas Charter Board. At least quarterly, the Superintendent will compile an academic progress report, including benchmark data, to the Governing Board with any bench mark data that may per pertinent. Academic goals established by the board will be monitored and become a part of the Superintendent's annual performance review.

**Finance Committee:** The Finance Committee shall consist of at least two Directors, one of whom shall be the Board's Treasurer, and the Superintendent and School Principal. The Financial Committee shall meet at least two (2) times per school year. The purpose of the Financial Committee shall be to prepare annual budgets for full Board review and approval, coordinate the Annual Audit, and develop long-term financial goals and plans for full Board consideration. Financial reporting will be reviewed monthly with analysis of the Profit and Loss, Balance Sheet and analysis of Budgeted vs Actual. The Governing Board, will establish financial policies and procedures and compile a manual as guidance to the Superintendent and school operations.

**Financial Oversight:** The Governing Board understands the short and long-term economics of the school and has systems in place to monitor short and long-term financial health. As part of the Governing Boards financial oversight role, the Superintendent will provide an orientation to all new board members on the fiduciary role of a non-profit Governing Board in Texas. The Governing Board will monitor break even enrollment numbers, preliminary and annual budgets as presented by the Superintendent. As part of long range planning for the school the Governing Board will monitor a 5 year projected budget and analyze future needs that may significantly affect the budget.

As part of the development of the policies and procedure policy, the following framework will be part of the finished manual:

- Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts.
- All documentation related to financial matters will be completed by computer, word processor, typewriter, or ink.
- The Governance Council can appoint someone else to perform the Superintendent's responsibilities in the case of absence.
- Establishment of a Purchasing Policy - The Superintendent's may authorize expenditures and may sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000.
- Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, asset management are all policies that will be established by the Governing Board and executed by the Superintendent's.
- Petty Cash and Credit Card Use Policy will be established using framework that is generally acceptable to Charter School cash handling procedures.
- Contracts. Consideration will be made of in-house capabilities to accomplish services before contracting for them. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the school. ) Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors). Contract service providers must



show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Superintendent's will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Superintendent's will be responsible for ensuring the terms of the contracts are fulfilled. Potential conflicts of interest will be disclosed upfront, and the Superintendent's and/or Member(s) of the Governance Council with the conflict will excuse themselves from discussions and from voting on the contract.<sup>48</sup>

**Audit Committee** (may or may not be the standing Finance Committee) The Governing Board will commission an annual financial audit by an independent third party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to TEA. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to:

- a. An audit of the accuracy of the financial statements
- b. An audit of the attendance accounting and revenue accuracy practices
- c. An audit of the internal control practices

**Governance Committee:** The Governance Committee shall consist of at least two Directors, and the Superintendent. The Governance Committee shall meet at least two (2) times per school year. The purpose of the Governance Committee will be to:

1. Plan and develop Director orientation and training.
2. Identify and qualify new Governing Board members based on the approved recruitment policy.
3. Put forth a slate of officers each year and report to TEA the up to date Governing Board members roster.
4. Ensure open meeting laws are in compliance in accordance with the Texas Open Meetings Act.
5. Ensure Board operations and policies are updated and compliant with Texas State law.
6. Establish goals for the school Superintendent.
7. Develop a tracking and measurement process to ensure the Superintendents and school leaderships goals are being achieved. Some of the targets of accountability detailed in this application and discussed by the Governing Board include:
  - a. Achieving 85% on the Texas Charter FIRST framework for Academic, Financial and Operational targets.
  - b. Achieving an A academic rating with the Texas school ranking metrics.
  - c. Retaining 85% of the schools teachers by year three.
  - d. Achieving enrollment targets as put forth in projected budgets and this application.
  - e. Establishing school based committees as defined in this report including:
    - i. **Academic Accountability Committee (AAC – unique to Cato)** – Lead by the site Principal and made up of Admin team and lead teachers.
    - ii. **School Advisory Committee (SAC unique to Cato)** – Made up of at least one parent, teachers and administrators.
    - iii. **RTI/MTSS Committee (RtI, MTSS best practice)** – Convened for at risk scholars made up teachers and administrators.

---

<sup>48</sup> National Charter School Resource Center

- iv. **Admission Review and Dismissal (ARD Texas specific)** – Composed of the Classroom Teacher, Specials Teacher, Admin and Parents – Convened during review of individual scholar IEP determinations.
- v. **Language Proficiency Assessment Committee – (LPAC unique to Texas)** - Composed of a certified EL teacher, administrator, ARD representative as needed, parent representative. Convened for individual scholar second language determinations.



## **Attachment 11: Code of Ethics and Conflict of Interest Policy**

Provide the following:

- Governing board's proposed Code of Ethics
- Governing board's proposed Conflict of Interest policy
- Identify any existing relationships that could pose actual or perceived conflicts if the application is approved.
- Outline specific steps the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

There are no existing relationships that could pose actual or perceived conflicts if this application is approved.

**CLASSICAL CHARTER SCHOOLS OF TEXAS, INC.  
CONFLICT OF INTEREST POLICY**

**Article I**

**Purpose**

The purpose of the conflict of interest policy is to protect Classical Charter Schools of Texas, Inc.'s (the "Organization") interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

**Article II**

**Definitions**

**Interested Person**

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

**Financial Interest**

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,
- b. A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement. Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

**Article III**

**Procedures**

**1. Duty to Disclose**

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all



material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

## **2. Determining Whether a Conflict of Interest Exists**

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

## **3. Procedures for Addressing the Conflict of Interest**

- a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- c. After exercising due diligence, the governing board or committee shall determine whether the Organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

## **4. Violations of the Conflicts of Interest Policy**

- a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

## **Article IV**

### **Records of Proceedings**

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the

financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.

b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

## Article V

### Compensation

a. A voting member of the governing board who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.

b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.

c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

## Article VI

### Annual Statements

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

## Article VII

### Periodic Reviews

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.



b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

#### **Article VIII**

##### **Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

Dated: 1 - 11 - 20

Nickolas Ellen  
Dr. Nick Ellen, Chair

## Cato Classical Academy

### (Proposed pending legal approval) Governing Board and School Leadership Ethics Policy

The Governing Board and school leaders are entrusted with protecting the safety and welfare of the public's trust. All officials must endeavor to pursue a course of conduct that does not raise concern or suspicion among the public. Therefore, they shall avoid acts, which are improper or give the appearance of impropriety. As leaders of the school, you are entrusted with public trust and are expected to act with integrity and transparency.

**Contracting and Purchasing:** The nature of the purchasing and contracting functions makes it critical that everyone involved in the process remain independent and free from the perception of impropriety. Any erosion of public trust or any shadow cast on public trust or any other shadow of impropriety is detrimental to the integrity of the procurement system as a whole.

Consequently, the credibility of a purchasing program requires that a clear set of guidelines and rules be established and adhered to. Such guidelines are designed to prevent actual and/or potential vendors from influencing school leadership in discharging their official duties honestly and fairly. Furthermore, these policies will prevent the school leadership and employees from situations in which their independent judgment could be reasonably compromised or questioned.

Therefore, with these principles in mind and in accordance with state law, the following policies and procedures should be adhered to by all City of Amarillo employees, vendors, potential vendors, and employees of other government agencies when acting under authority delegated from the City of Amarillo.

#### A Governing Board Member or charter school leaders may not:

1. Have financial interest in, or otherwise be connected with a school contract or bid for the purchase of goods or services by the charter school. This includes, participation or involvement in working on a request, bid, purchase, or, contract knowing that the employee or member of his/her immediate family is in a mid-management or higher level position with the vendor. In such cases, the leader is deemed to have a conflict.
2. Where an decision maker has a financial interest, connection, or deemed conflict on a request, bid, purchase, or contract for goods or services, then:
  - a. Each department involved in the matter must flag files and electronic records sufficiently to indicate, that such team member is to have no access, input, communication, involvement, contact, consultation, administration, monitoring, or any other form of type of connection with such matter at any time.
  - b. The conflicted leader must remove him/herself from any and all input, communication, involvement, contact, consultation, administration, monitoring, or any other form or type of connection with such matter.
  - c. Other school staff shall not communicate in any way with the conflicted employee regarding any aspect, process, or administration of the matter.
3. Accept or solicit anything of value whether by gift, rebate, service or favor from a person to whom a school contract may be awarded, directly or indirectly.
4. Be employed by, or agree to work for, a school vendor or potential school vendor.
5. Knowingly disclose or transmit confidential information acquired in the course of one's official duties for any form of reward or personal gain.



## Attachment 12: Board Members' Résumés and Biographical Affidavits

For each member of the proposed school's governing board, provide a résumé AND a notarized Board Member Biographical Affidavit, a template for which is available on the [Subchapter D](#) application page.

All prompts and response boxes must be completed on the affidavit. If a prompt does not apply to the board member, enter a response of N/A followed by a brief explanation of why the prompt does not apply. Ensure that the anticipated role to be filled at the proposed charter school is identified.

**NOTE: Substantial repetition among and between affidavit responses will be subject to this application's Plagiarism Policy, and may be removed from consideration. Applicants must ensure that each board member individually provides her/his own personal response.**

## CURRICULUM VITAE

Houston, Texas 77083  
Mobile / Cellular: (832) (215-0123)  
Email: nvellen@swbell.net

### PERSONAL INFORMATION

Born: [REDACTED]  
Married: Venessa Ellen  
Children: Venezia and Lindsey  
Parents: Irvin Carter and Thelma Ellen-Carter  
Church Membership: Community of Faith Bible Church, Houston, Texas, April, 2010

### EDUCATION

Southwestern Baptist Theological Seminary, Fort Worth, Texas  
Major: Doctor of Philosophy in Biblical Counseling 2019

Southern Baptist Theological Seminary, Louisville, Kentucky  
Major: Doctor of Ministry/ Biblical Counseling 2010

The Masters University, Santa Clarita, California  
Masters of Arts in Biblical Counseling, 2008

Dallas Theological Seminary, Dallas, Texas  
Masters of Arts in Christian Education, 1994

The University of Houston, Houston, Texas  
Bachelor of Business Administration, 1991

### CERTIFICATIONS

Association of Certified Biblical Counselors  
Biblical Framework Counseling Association  
International Association of Biblical Counselors

### TEACHING RELATED WORK EXPERIENCE

Senior Professor of Biblical Counseling The College of Biblical Studies, 1995 - Present

- Present lectures
- Instruct students
- Grade all student assignments (as needed)
- Program Coordinator of the Traditional Bachelors in Biblical Counseling

Adjunct Professor of Biblical Counseling National Theological College, and Graduate School  
2014 - present

- Present lectures
- Instruct students
- Develop Syllabi /Rubric for Grading all student assignments

Adjunct Professor of Biblical Counseling Bob Jones University 2018 - present

- Present lectures
- Instruct students
- Develop Syllabi /Rubric for Grading all student assignments



**CURRICULUM VITAE**

Houston, Texas 77083  
 Mobile / Cellular: (832) (215-0123)  
 Email: nvellen@swbell.net

**Conference Speaker**

Association of Certified Biblical Counselors, 2009-present/  
 Faith Baptist Church Lafayette, Indiana 2017-2018/  
 Various Churches throughout the United States, 2010-present

- Present lectures on various biblical counseling topics

**MINISTERIAL WORK EXPERIENCE**

|                  |                                     |                |
|------------------|-------------------------------------|----------------|
| Senior Pastor    | Community of Faith Bible Church     | 2010 – Present |
| Senior Co-Pastor | Jireh Bible Church                  | 2004 - 2010    |
| Associate Pastor | Good Hope Missionary Baptist Church | 2002 – 2004    |
| Assistant Pastor | Bible Way Fellowship Baptist Church | 1997 - 2002    |

**Missionary Experience**

|   |                      |              |
|---|----------------------|--------------|
| Overseas Instruction in Counseling<br>(Present lectures on various biblical counseling topics)                    | Lebanon/ Kiev/Jordan | 2014-Present |
| Refugee Training<br>(Presented lectures on various biblical counseling topics)                                    | Edmonton, Canada     | 2016         |
| Africa Association of Certified Biblical Counseling<br>(Presented lectures on various biblical counseling topics) | South Africa         | 2017         |
| Expository Counseling Center Overseas Training in Mexico  |                      | 2018         |

**PUBLICATIONS****Books**

- With All Your Heart?
- So You Want to Get Married
- Happy Even After
- Every Christian a Counselor
- Men Counseling Men (Contributing Author)
- Christ-Centered Biblical Counseling (Contributing Author)
- Biblical Counseling and The Church (Contributing Author)
- Counseling by The Book Expanded and Revised Version (Co-Editor)

**Workbooks**

- Coming to Know and Walk With God
- Understanding and Developing a Biblical View of Life
- Biblical Framework Counseling Basic Training Course
- Marriage and Family Basic Training Course
- Dynamics of Biblical Counseling
- Common Issues We Face in Life
- Pursuing Godliness through the Disciplines of the Christian Faith
- Biblical Counseling Practicum
- Theological Building Blocks for Biblical Counseling

---

CURRICULUM VITAE

Houston, Texas 77083  
Mobile / Cellular: (832) (215-0123)  
Email: nvellen@swbell.net

**BUSINESS**

- Expository Counseling Center, LLC ([www.mycounselingcorner.com](http://www.mycounselingcorner.com))  
Founder and Owner

**TV Broadcast**

- Morning Bible Teacher on "Up With The Son" TV Show presented by the College of Biblical Studies on TBN

**Board Member**

- Board Member of the Biblical Counseling Coalition 2014-2016

**Renee McGuire**

R West Development

7918 Broadway St # 106, Pearland, TX 77581

(281) 997-1500

**Renee McGuire**, a long term resident of Pearland and active member of the business and social services landscape of south Houston. She has built a number of housing, commercial and non-profit entities in the area and uniquely knows what her community needs. Forgotten Angels was founded in 2001 and ran for a decade by Renee McGuire, to help friends who were struggling to find appropriate services for their adult children with disabilities. In 2011, Forgotten Angels Foundation partnered with Unified Care Group to provide foster care and Home and Community-based services. Today, Forgotten Angels Foundation provides over 20 residential homes in the areas specially designed homes and facilities, as well as recreational, educational, and vocational opportunities for more than 120 individuals with special needs. Forgotten Angels maintains a dayhab program which brings in special needs adults to a dedicated facility for medical, therapy and social program.

Mrs. McGuire is from Pearland and has been an active member of the community for her whole life. She is the owner of R West Development who has build dozens of residential projects, commercial, apartment and elderly care communities in and around Alvin and Pearland.



JIGNESH DERASARI  
3423 Senova Drive, Pearland, TX 77584  
832 350 3531  
JDerasari@yahoo.com

## PROFILE

---

Business Management executive with extensive global P&L experience of managing businesses ranging from large greenfield start-ups, growing organizations and businesses that are going through turnarounds through a combination of targeted operational excellence and strategic product management. Proven ability to manage large globally dispersed teams to handle complex transactions aligned to deliver maximum shareholder value. Well-honed public speaking, presentation, communication and negotiation skills.

Key strengths include:

- Proven track record of delivering sustained double digit increases on top line and bottom line spread over 20 years of professional career spanning 6 different industries
- Ability to setup and manage operations in any part of the world for medium to large projects in diverse fields such as Manufacturing, Services or Infrastructure businesses
- Creating long-term growth by driving strategic planning in Product Positioning, implementing targeted market capturing strategies and instilling discipline in delivering on commitments
- Implementing Operational Excellence discipline in large Manufacturing and Service teams to drive customer satisfaction at optimum cost with a "Can-Do" attitude
- Ability to manage large geographically dispersed teams to share common vision and drive organization to succeed
- Six Sigma Blackbelt and Master Blackbelt certified to drive business processes with a goal of zero defects and driving optimum customer satisfaction

## EXPERIENCE

---

PEAXY, INC San Jose, CA USA

2015- Current

### VP, Global Sales

Peaxy is an innovative data aggregation, access and analytics startup focused on developing unique solutions related to unstructured data aggregation and predictive analytics. Using its proprietary platform technology and associated applications, Peaxy develops solutions for the industrial markets such as Digital Twins, Digital Dossier and Model Orchestration. Role is to lead the Global Sales organization to identify opportunities and close deals to expand the top line of the business.

- Led the Global Sales team to identify opportunities to position the product to solve industrial customer challenges by utilizing Peaxy's proprietary technology. Typical customers are Fortune 500 customers involved with large scale data and knowledge needs
- Grew the top line from less than \$1MM to more than \$10MM per year; a 10 fold increase. Specific focus has been to identify opportunities in adjacent markets such as predictive analytics and data visualization which increased the SAS by more than 500%

- Developed the Sales organization from a small team to a high performing team that has been able to translate market trends to business objectives; a key requirement for a start up in the ever-growing data aggregation and analytics field

#### **MCFI INVESTMENTS, Houston, USA**

2013- 2015

##### **Chief Executive Officer**

MCFI is a Private Equity Group focused on identifying and executing on private investment opportunities in the O&G, Heavy Constructions, Healthcare and Real Estate markets. Role is to run the daily operation of the business including raising capital globally in the private and public capital markets, identifying opportunities in the focused areas that meet established criteria and taking management control of such opportunities.

- Led the USA based team on closing transactions in O&G sector inclusive of offshore marine construction, Services and Manufacturing. Typical deal size has been around \$50M.
- Grew existing portfolio by 24% in the Healthcare and Real Estate verticals by focused execution of opportunities in Asia and USA. Specific actions led the quality of AUM to be high grade.
- Raised private and public capital in the conventional and unconventional capital markets to support investment strategy to the tune of \$500M globally

#### **ADANI GROUP, Brisbane, AUSTRALIA**

2011- 2013

##### **Chief Executive Officer, ADANI AUSTRALIA**

Adani Group is a \$6Billion organization involved in major Infrastructure businesses such as Coal Mining, Power Generation and Port Operations. Role is to setup and lead the Australia Operation to implement a \$10Billion investment for developing one of the world's biggest vertically integrated logistical supply chain for coal mining in Queensland, Australia. Responsibilities include complete management of the start-up, procuring approvals and financial closure and driving project to completion

- Led the Australia business, which included developing a \$10Billion integrated coal supply chain including a 60MTPA coal mine, 190 KM long rail network, two deep sea ports totaling 150MTPA capacity and associated infrastructure such as power, water, road and accommodation
- Developed a 150+ strong world class organization inclusive of all disciplines such as Project Management, Engineering, Procurement and all support functions to manage the diversified portfolio of large infrastructure projects in mine, rail, port and associated infrastructure
- Secured all government approvals in record time to start construction of the mega project using extensive project management, government liaison work and active stakeholder management including procuring a land parcel from a landowner at the cost of \$105MM.
- Completed all Engineering, Planning and Procurement for all facets of the project totaling \$750MM in record time while managing all overrun risks so that construction can begin immediately on securing approval



- Developed a very healthy relationship with all stakeholders, specially the Government, the landowners and the supplier network so that the Group is very well known and established in a new environment of operation by active involvement with all interested parties at all levels

#### LEIGHTON INTERNATIONAL, Mumbai, INDIA

2009 - 2011

##### Chief Executive Officer, Leighton, India Oil & Gas

Leighton Holdings is a \$18 billion organization with specialization in EPC projects in infrastructure sectors. Role was to lead the \$450M India Oil & Gas business. Responsibilities include complete management of the day-to-day operation of the business with a goal of growing the top line and bottom line while maintaining strong focus on operational excellence

- Led the India Oil & Gas business, a \$450M business which includes 400+ employees catering to a diversified portfolio of EPC projects including pipelines, SPM and platform installations.
- Grew order book by 40% by entering new areas of growth by developing partnerships with other entities in areas such as platform installations, services and retrofit work
- Established an operating rhythm to manage existing projects to deliver projects safely, on schedule and on budget, thereby growing Contribution Margin by 24%. Main focus on consistently driving a culture of no LTIs, quality workmanship and budget adherence
- Grew the business by 22% by diversifying in the marine structure business including construction of Ports and Jetties and added two projects worth \$100M. Established an operating business including personnel, equipment and facilities that can deliver a sustainable and profitable business

#### GENERAL ELECTRIC, Fairfield, Connecticut

1998 - 2009

##### Regional General Manager (Act), GE Oil & Gas, Luanda, Angola

2008 - 2009

GE Oil & Gas is a \$9 billion equipment and services company operating in the upstream and downstream oil and gas arena. Role is in the \$2 billion Vetco Gray business of GE Oil & Gas and reports to the CEO of the business. Responsibilities include managing the Sub Sahara Africa region including growing the top line and bottom line while maintaining strong focus on compliance and operational discipline

- Led the Sub Sahara Africa region including 350+ employees and grew the orders in excess of \$550MM, an increase of 14% with a Contribution Margin of \$120MM, a net increase of 22% by enforcing a strong discipline of customer satisfaction through operational excellence
- Increased Operating Margin by 19 points through focus on operational improvements such as base cost control, personnel productivity & implementing a culture of personal accountability
- Developed strong relationships with all six major players in the Oil & Gas industry in the region by open and clear communication, addressing issues with and following up on actions to improve business processes which resulted in improved customer satisfaction and Orders increase of 14% to \$556MM

HOLM INDUSTRIES, Scottsburg, IN (A Standard Products Company)

1993 - 1994

Holm Industries is a leading supplier of flexible and rigid extrusion products for the refrigeration and home improvement industry. Holm Industries is recognized as the market leader with over \$200MM in revenue spread over 6 manufacturing operations and 1000+ employees

**Production Shift Manager**

Role was in the flexible extrusion department, which has responsibility of 60% of the production of the plant. Plant was a strong unionized environment and relationship with the union was a key focus

- Exceeded production goals by 20% in the flexible extrusion department while maintaining high degrees of quality of 0.01% Reject Rate by developing strong culture of personal ownership
- Supervised a production shift comprising approximately 40 employees on an off-shift and developed a great working relationship with the union

**EDUCATION**

---

|  |      |
|--|------|
| UNIVERSITY OF INDIANA, KELLY SCHOOL OF BUSINESS, New Albany, IN<br>MBA, with concentration in Finance, and Strategic Management, 3.9 GPA | 1997 |
|--|------|

|  |      |
|--|------|
| OKLAHOMA STATE UNIVERSITY, Stillwater, OK<br>M.S., Chemical Engineering. 3.5 GPA | 1993 |
|--|------|

|   |      |
|---|------|
| GUJARAT UNIVERSITY, L.D. COLLEGE OF ENGINEERING, Ahmedabad, India<br>B.S., Chemical Engineering | 1991 |
|---|------|

**ADDITIONAL INFORMATION**

---

Rated Top Talent six years in a row at General Electric

Six Sigma (BB and MBB) Certified

U.S. Citizen

Willing to relocate

Active Community involvement through activities such as BP MS150, Houston Food bank, etc.



**JILL SHOCKLEY**  
**LIFE ENRICHMENT DIRECTOR**  
**FORGOTTEN ANGELS FOUNDATION**

---

**Contact**

PHONE:  
832-243-5925

WEBSITE:  
Forgottenangels.org

EMAIL:  
jshockley@forgottenangels.org

**EDUCATION**

---

**Stephen F. Austin State University**  
1988 to 1992, Summa Cum Laude  
GPA: 3.9, Major GPA: 4.0  
Bachelor of Science in Speech and Hearing  
**Texas Teacher Certification in Speech Therapy**  
All grade levels, 1992  
**University of Houston, Online Courses**  
September, 2019  
Certificate of Completion in Grant Writing

**WORK EXPERIENCE**

---

**Lufkin State School – Intern in Speech Language Pathology**  
1992–1994  
Served nonverbal adults through augmentative means, including Every Move Counts and facilitative communication.

**Alief Independent School District -Speech Language Pathology Asst.**  
2001–2011  
Conducted therapy and assessment sessions for autistic and other severe behavior-challenged students unable to attend AISD facilities.

**Forgotten Angels Foundation-Life Enrichment Director**  
2013–Current  
Oversee programs, classes, and events in prevocational, social, and fine arts to challenge and teach adults with disabilities. Fundraising.

**ADDITIONAL SKILLS**

---

Scout/Parent Unit Coordinator, Boy Scouts of America, 2008-2017  
Women's Leadership Team, Bethel Church of Houston, 2014-Current  
Bible Study Leader, Bethel Church of Houston, 2015-Current  
[REDACTED]  
Homeschool Teacher, 1999-2019  
Married to Dr. Paul R. Shockley, 1992-Current

## GENERATION 25 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

### BACKGROUND

Full Legal Name: Dr. Nicholas Ellen

Home Mailing Address:

Phone Number: 832-215-0123

E-mail Address: nvellen@swbell.net

Business Name:

Business Mailing Address:

Business Phone Number:

E-Mail Address:

Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.

- ☐ Yes
- ☒ No, does not apply to me

If Yes, state the name of the entity:

### RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

1. What was your motivation to serve on the board of the proposed charter school?

Classical schools, which we are proposing to open, aligns with my personal views of what schools should be focusing on. My world view lines up with a school model like ours. I think our school should expose kids to the big ideas of life. I particularly like the idea of using the classical stories and novels as well as a firm focus on the history of the world and of America. As a pastor, [REDACTED] I've tried to impart my beliefs that moral foundations are what makes for a strong community. As a counselor and pastor, day in and day out, I see people struggling and empty because they are stuck in a society that is shallow and empty. Social media is empty, knowledge without wisdom is empty. The feeling of aloneness is sweeping our kids and I want to be a part of creating a community where kids are heard, respected, and given goals and boundaries. This is my life's work and this school is an extension of that work.



2. What is your understanding of the appropriate role of a public charter school board member?

As a member of the non profit board, my role is to oversee the school leadership, set policy and oversee the academic and financial goals of the charter school. I hope to bring a level head and with my experience in counseling I hope to ensure that we come together to support the school, teachers and students.

3. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have not served on a charter school board in the past. My entire adult life has been one of service to a higher mission. I hope to bring that same enthusiasm and years of experience with nonprofit boards to our efforts at Cato Classical.

4. Describe the specific knowledge and experience that you would bring to the board.

As a Pastor, I have worked with non-profit boards for years and uniquely understand how good and bad boards can help or hurt an organization. I think I understand human nature, motivations and how to keep our board and our school focused on the big picture.

## SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

The mission of the school to provide a rigorous, time tested education, that focuses on character development as well as academic achievement. The importance of partnering with parents is an important aspect of the mission statement for me. I want to be involved with a school that values relationships. Our community needs a school like we are creating now more than ever. The values of responsibility, gratitude and humility in particular have been important in my life and I have seen how these traits set up children for success in the future.

2. What is your understanding of the school's proposed educational program?

I have researched classical education and understand that it uses history, time tested novels and weaves together a story as the foundation the academic program. Renee and Joe and I have spent a lot of time going over what we want in a school. My background is in higher education and it has been enlightening to hear their first hand experiences in elementary education. I appreciate the focus on the arts, athletics as well as math and English. The focus on teacher hiring and career development is important. From my experience, finding and training top staff is the key to long term success.

3. What do you believe to be the characteristics of a successful school?

For me, a successful school would be one that is meeting their academic and financial goals and are functioning at a high level in both areas. I think a focus on a culture built on personal relationships, high expectations and a belief that each child is special and deserves the best education possible. I would like to

see a school that the community embraces and that parents and families plug in with to create connections.



4. How will you know that the school is succeeding (or not) in its mission?

For me, success would look like having a school where teachers grow in their career choice and as people and where students feel loved and supported.

## GOVERNANCE

1. Describe the role that the board will play in the school's operation.

My background is in finding the best people to match the roles in an organization. I counsel, mentor and coach people in my professional and I think I can bring those first hand experiences to the school. I tend to be a stabilizing force with pressure is high and I always look for ways to build consensus and not tear each other down. I've had governing boards that I have reported to in the past and I uniquely know the role of a board in setting policy and measuring results versus getting into the operations. I think I can navigate this role as board chair.

2. How will you know if the school is successful at the end of the first year of operation?

Success to me, in the first year, look like a school that making an impact on the local community and meeting our enrollment goals. By the end of year on, I hope to have a strong Principal in place that believes in our mission, has experience in education and has a heart for teachers and students. I hope to have a strong teaching staff that is growing in their understanding of classical ed and our mission.

3. How will you know at the end of four years if the school is successful?

By the end of four years, we should have strong enrollment and receive strong feedback from our parents and staff. By year four, students growing academically and in their character. When I visit the campus, I would hope to see kindness, respect for one another and a campus full of smiling kids. I would expect no less than an A graded school by year four.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

The governing board is made up of experts in various areas of business and nonprofit operations. Success looks to me like each member bringing their expertise to the school board. Success looks to me like being able to learn from others and better understand areas that are new to me. I will help the board establish ways to measure the goals we set forward. I am a firm believer in accountability and grace and will hold our school leaders to high standards.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interest of the school?

If one of our board members were acting unethically or not in the best interest of the board, I would first address the issue head on. If I thought their was an issue after getting the facts I would get the board together to discuss a solution. I have seen a number of unethical situations in my professional career and I have learned to address these types of issues head on, without judgments and using facts.

## DISCLOSURES

1. Indicate whether you (or your spouse) knows the other prospective board members for the proposed school.

☒ Yes

☐ No, I/we do not know these individuals

If yes, describe the precise nature of your relationship.

2. Indicate whether you (or your spouse) knows any person who is, or has been in the last two years, a school employee.

☐ Yes

☒ No, I/we do not know any such employees

If yes, describe the precise nature of your relationship.

3. Indicate whether you (or your spouse) knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity).

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship and the nature of the business that such person(s) or entity is transacting or will be transacting with the school.

4. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owner, directors, or agents of that provider.

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

☒ Not applicable because the school does not intend to contract with an education service provider or school management organization.

5. If the school intends to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider.

☐ Yes

☒ No, I/we or my family do not anticipate conducting any such business.

If yes, describe the precise nature of your relationship.



6. Indicate whether you, your spouse, or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

☐ Yes

☒ Does not apply to me, my spouse, or family.

If yes, describe the precise nature of your relationship.

7. List all business or organizations of which you are a partner or in which you have a majority interest.

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

I have no prior experience with charter schools.

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

☐ Yes

☒ Does not apply to me.

If yes, state the compensation you expect to receive.

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

☐ Yes

☒ Does not apply to me.

If yes, describe the precise nature of your relationship.

11. Will any relative(s) within the third degree of consanguinity or affinity (See definition in question 10.) be employed by or receive any compensation or remuneration from the sponsoring entity, charter school, or the management company of the charter school?

☐ Yes

☒ Does not apply to me.

If yes, provide information relating to the matter(s).

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

☐ Yes

☐ Does not apply to me.

If yes, describe the precise nature of your relationship.



# CERTIFICATION

I, Nicolas Ellen, certify to the best of my knowledge and ability that the information I am providing to the Texas Education Agency as a board member is true and correct in every respect.

Signature

Nicolas Ellen

Date

1-16-20

State of New York

County of Warren

On this day, Nicolas Ellen (name of affiant) appeared before me the undersigned notary public and depose 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 16 day of January, 2020.

(Notary Public)

KAY A. GROSS

(Seal)

My commission expires

KAY A. GROSS  
Notary Public, State of New York  
Registration #01GR6217553  
Qualified In Warren County  
Commission Expires Feb. 10, 2022

## **RESUME**

**RENEE L. McGUIRE**

**PERSONAL:** *Married*  
**ADDRESS:** *7918 Broadway, Suite 104, Pearland, TX 77581*

### **WORK HISTORY**

- 1991 - Present** *Self-Employed - Formed R. West Development Co., Inc. - Developer of Commercial Mini Storage, Active Adult Communities, Apartments, Restaurants, Day Care, Retail Office Buildings, and Residential Subdivisions in the City of Pearland and Houston area and Woodlands. Developed 3,000 Lots in Pearland, 126 Active Adult Apartments, over 275,000 s.f. office and retail.*
- 2009-Present** *Biblical Counseling Ministry, Apologetics & Worldview Teaching.*
- 2004-Present** *Founder Petra Foundation, Inc./Foundation a non-profit organization providing housing for offenders, homeless, mental health and elderly and hardship people. (see website: [info@ForgottenAngels.org](mailto:info@ForgottenAngels.org))*
- 2001 - Present** *Founded Forgotten Angels, Inc., a non-profit organization providing residential services and day habilitation for children and adults with special needs, where I oversee daily operations.*
- 1998 - 2010** *Hardcastle Real Estate - Commercial Real Estate Sales & Brokerage.*
- 1995 - Present** *Formed Financial Acquisition Corporation - Buy 1st lien notes in default and forecloses on assets. Owns working interests and royalty interest in Oil Wells in Texas, Oklahoma and Arkansas.*
- 1988 - 1990** *Self Employed - Consulting, Asset Recovery and Work outs, Buying discounted notes for Investors, sold several tracts of raw land to developers. Management and Leasing (office buildings and warehouse), Mortgage Broker and Industrial Tenant Representative for build to suit and leasing.*



**1981 – 1988**      ***Self-Employed - Formed Spectrum Development Company, a service-oriented group committed to the professional development of commercial properties. Stressing conscientious planning, precise workmanship and personal attention to detail, the Spectrum group was assembled to reflect expertise in a variety of development related areas. I remained closely connected to every job undertaken, so that our commitment to service and detail was never compromised.***

**SPECTRUM DEVELOPMENT COMPANY 1981 to 1988**

***Spectrum Development Co., designed, built, financed, leased, managed, and sold Office Buildings, Shopping Centers and Office/Warehouses. I did all feasibility studies, financing packages, land contracts, draw schedules, closings, research and development. Completed over \$30,000,000. in Commercial and Industrial projects in the Houston area. Started Residential Development Company 1984 - Bought land in Bellaire, put in lots and built homes for sale - \$500,000. and up.***

***Started Spectrum Management & Leasing Co. - A commercial leasing and management company that specialized in office buildings and shopping centers and office/warehouse.***

***Started R.L.R Construction, Inc. – General Contracting Co. Built Office Buildings, Shopping Centers and Office/Warehouse. Completed over \$35,000,000 in construction projects.***

***"BOCA DEL RIO" Seafood Restaurant - developed, designed, built, owned and operated since 1984. Sold August 1990.***

**1975 – 1981**      ***Richey Development Co. - Organized, built and ran the company that developed Office Buildings and Doctors Clinics. Responsible for all phases of development of 3 buildings, including construction, leasing, management, financing, and sales.***

***R & R Construction Co. - 50% owner and managing partner. Specialized in build out of interiors of office buildings for tenant lease space. Completed over 250,000 s.f.***

***1972 – 1975 Charles W. Murrell & Assoc. - Commercial & Industrial Real Estate Sales. Sold several office buildings, parcels of land and offices/warehouses.***

### ***MISCELLANEOUS***

***Real Estate License since - 1972  
Community Award City of Bellaire - 1982  
Completed Courses in Real Estate Finance, Law 1974  
Management, Marketing, Electrical, and H.V.A.C. 1977  
Pearland Citizen of the Year Award – 2005  
Brazoria County Philanthropist of the year – 2007  
Award for Humanitarian of the year 2013 Pearland  
Board of Directors - Heart of Texas Foundation - 2011-2016  
(see Heart Of Texas Foundation website)  
Associates Degree Bible Studies - 2014  
Bachelor's Degree - Biblical Counseling 2017  
CEO & Founder - Forgotten Angels Inc/Foundation 2001  
(\$5,000,000 year Non-Profit - see website)***

### ***PROJECTS***

***One Bissonnet Park  
4545 Bissonnet  
70,000 s.f. Office Bldg.  
Owner – Developer***

***broke ground Fall 1981  
completed July 1982  
sold - 1984***

***Northwoods Park I  
4606 FM 1960 West  
105,000 s.f. Office Bldg.  
Owner – Developer***

***broke ground Spring 1982  
completed February 1983  
sold - 1984***

***Two Bissonnet Park  
4500 Bissonnet  
70,000 s.f. office bldg.  
Owner – Developer***

***broke ground Spring 1983  
completed March 1984  
95% leased in 6 months***

***Stuebner Centre***

***broke ground 1984***



|  |   |
|--|---|
| <b>10625 Stuebner-Airline</b><br><b>32,000 s.f. Strip Center</b><br><b>Owner – Developer</b>   | <b>completed 1984</b>   |
| <b>Northwoods Centre</b><br><b>4608 FM 1960 West</b><br><b>23,000 s.f. Strip Center</b><br><b>Owner – Developer</b>                              | <b>broke ground June 1984</b><br><b>completed December 1984</b><br><b>100% leased</b>                           |
| <b>Katy Center</b><br><b>811 Avenue D</b><br><b>Owner – Developer</b>  | <b>broke ground September 1984</b><br><b>completed March 1985</b>   |
| <b>Richmond Atrium Bldg.</b><br><b>6403 Richmond</b><br><b>50,000 s.f. Office Bldg.</b><br><b>Management, Leasing and Construction</b>           | <b>1974-1977</b>  |
| <b>Clear Lake Center III</b><br><b>42,000 s.f. Retail and Office</b><br><b>Management, Leasing and Construction</b>                              | <b>1974-1979</b>  |
| <b>4925 Mooney Road Bldg.</b><br><b>12,000 s.f. Office Bldg.</b><br><b>Developer, Management, Leasing</b><br><b>And Construction</b>             | <b>Build to Suit – Pardons</b><br><b>&amp; Parole, Texas</b><br><b>Rehabilitation Commission</b><br><b>1977</b> |
| <b>Harwin Place</b><br><b>6666 Harwin</b><br><b>77,000 s.f. Office Bldg.</b><br><b>Developer, Management, Leasing and</b><br><b>Construction</b> | <b>Broke ground April, 1981</b><br><b>completed January 1982</b>  |
| <b>"Boca Del Rio" Seafood Restaurant</b><br><b>6508 Washington</b><br><b>6,000 s.f. Restaurant</b><br><b>Owner - Developer</b>                   | <b>opened April, 1985</b><br><b>sold in September 1989</b>  |
| <b>West Oaks Subdivision</b><br><b>Pearland, Texas</b><br><b>Owner – Developer</b>   | <b>780 lots</b><br><b>Started November, 1992</b>  |
| <b>Art Center Building (Hogg-Historic)</b><br><b>401 Louisiana</b><br><b>Management, Leasing and</b><br><b>Construction (Renovation)</b>         | <b>130,000 s.f. Office</b><br><b>Building Downtown</b><br><b>Houston - 1991</b>                                 |

**Oakridge Forest Subdivision**  
**1-45 @ Rayford Sawdust**  
**Woodlands, Texas**

**72 acres, 220 lots**  
**started January 1995**

**Pine Hollow Subdivision**  
**Pearland, Texas**  
**Owner-Developer**

**459 lots**  
**First Section started**  
**March, 1995**

**West Oaks Village Subdivision**  
**Pearland, Texas**  
**Owner-Developer**

**454 lots**  
**Started August, 1995**

**Stepping Stones Learning Center**  
**Build to Suit**  
**Pearland, Texas**  
**Owner-Developer**

**7,200 s.f. - Day Care Center**  
**completed April 1997**  
**2654 West Oaks Blvd**

**Stepping Stones Learning Center II**  
**Build to Suit**  
**Pearland, Texas**  
**Owner-Developer**

**10,000 s.f. - Day Care Center**  
**completed November 2003**  
**7922 Broadway**

**Ravenwood Subdivision**  
**Section One**  
**Pearland, Texas**  
**Owner-Developer**

**120 acres**  
**1 acres lots/Equestrian Center**  
**September 1997**

**Southwest Fertilizer**  
**Build to Suit**  
**Pearland, Texas**  
**Owner-Developer**

**5,600 s.f.**  
**6117 Broadway**  
**completed March 1998**

**Joseph's Gulf Coast Grille**  
**Build to Suit**  
**Pearland, Texas**  
**Owner-Developer**

**12,000 s.f.**  
**Restaurant**  
**6425 Broadway**

**Wells Fargo Bank Building**  
**Build to Suit**  
**Pearland, Texas**  
**Owner-Developer**

**28,000 s.f.**  
**Summer, 1999**  
**6302 Broadway**



***Pine Hollow Estates Subdivision  
Pearland, Texas  
Owner-Developer***

***54 one-half acre lots  
March 1998***

***West Oaks Centre'  
Build to Suit (in progress)  
Pearland, Texas  
Owner-Developer***

***25,000 s.f.  
Retail Center  
1996***

***Twelve Oaks Subdivision  
North Harris County, Community of  
Hufsmith, northeast of Tomball, Tx  
Developer***

***180 lots  
private gated community***

***Edinburgh Estates Subdivision  
North Harris County  
Owner-Developer***

***83 lots  
private gated community***

***Green Tee – 375 acres – Pearland  
Owner-Developer***

***1,100 lots (450 Active Adult Patio  
Homes)***

***Bellavita, Villa Verde Villa de Este  
Owner-Developer***

***Completed 2005***

***Sherwin Williams  
Build to Suit  
Pearland, Texas  
Owner-Developer***

***9,000 s.f.  
Retail Center  
6125 Broadway  
1995***

***Towne Lake  
Pearland, Texas  
Owner-Developer***

***117 Acres  
219 lots - Completed 2004  
25 acres Commercial***

***Martha's Vineyard  
Alvin, Texas  
Owner-Developer***

***111 Acres  
315 Lots  
2019***

***Villages of Towne Lake  
Pearland, Texas  
Owner-Developer***

***14 Acres  
126 Apartment homes  
(Active Adult Community)  
Completed 2009***

**Tranquility Lake Center  
Pearland, Texas  
Owner-Developer**

**39,000 s.f. (3 bldg's plus  
Stepping Stones II)  
Office Park  
2005/2006/2007**

**Pine Hollow Plaza  
Pearland, Texas  
Owner-Developer**

**11,000 s.f. (2 Bldgs.)  
  
Completed 2015**

**Tranquility Plaza  
Pearland, Texas  
Owner-Developer**

**10,800 s.f. Shopping Center  
2015**

**Covington Estates  
Pearland  
Owne-/Developer**

**23 Lots  
2015**

**Day Care  
League City  
Owner**

**9,000 s.f. Day Care  
  
2014**

**Bella Palazzo  
13098 Westheimer  
Houston  
Owner/Developer**

**242 Unit Apartments  
  
Completion January 2018**

**Cypress Village III  
Pearland**

**69 Lots  
2017**

**Tranquility Lake Estates  
Pearland  
5 Acres Commercial**

**24 Lots  
2019**

**Terra Estates  
Manvel**

**66 Lots**



**EXPERTISE:**

|                                 |  |
|---------------------------------|--|
| <b>Architectural</b>            | <b><i>Can read, review and critique full set of construction plans and specs, including structural, mechanical, electrical, plumbing, civil, elevations, site plans, floor plans, etc. Motivate, direct, inspire architects to use their creative talents to design something functional, yet appealing.</i></b>               |
| <b>Construction</b>             | <b><i>Write contracts, negotiate, estimate, and inspect all phases of construction. Manage, supervise and inspections. Set up draws and schedule subcontractors. Purchase material and do take-offs. Know carpentry, site grading, minor electrical, and H.V.A.C.</i></b>  |
| <b>Development</b>              | <b><i>Site selection, feasibility studies and market analysis, highest and best use, proformas, projections, budgets, estimate costs (soft and hard), and preliminary designs.</i></b>   |
| <b>Financing</b>                | <b><i>Packages for lenders, syndications, sales packages, lease proposals, progress and financial reports to lenders. Secure, negotiate and close loans.</i></b>   |
| <b>Leasing &amp; Management</b> | <b><i>Proposals, lease agreements written and negotiated, prospects generated, work with brokers, close and work through space plan, build out and move in. Set up Procedure manuals for management and maintenance.</i></b>   |
| <b>Legal</b>                    | <b><i>Thorough knowledge of legal problems having to do with all phases of Real Estate and Development. Have experience in research of case law and how the system works. Do very well with problems and enjoy solving them. Can draft contracts, leases, partnership agreements, releases, review title reports, etc.</i></b> |
| <b>Administrative</b>           | <b><i>Plan and set up any and all phases of business or development, leasing, management, construction, and accounting. Great organizational skills.</i></b>   |
| <b>Raising Capital</b>          | <b><i>Have successful experience in raising money for projects.</i></b>  |

**REFERENCES:**

**RENEE L. McGUIRE**

***Linda Long – Heritage Bank, Pearland, Texas Ph: (281) 485-0600***

***Rich Mahabir – BancorpSouth Bank, Houston, Texas Ph: (281) 243-8053***

***Gary Idoux – Capital Bank, Pearland, Texas Ph: (713) 586-4870***

***Ron Jones – Prosperity Bank, Katy, Texas Ph: (713) 663-8499***

***Robin Reed – Harry Reed & Company, Houston, Texas Ph: (713) 961-0110***

***David Komiss - Attorney at Law, Bellaire, Texas Ph: (713) 665-2500***

***Riley Hetherington - Attorney at Law, Houston, Texas Ph: (713) 961-1200  
x 224***

***Jerry Volomino – Ph: 1-(949) 859-1615***

***Chad Thumann – Ph: (281) 914-5202***



**2017**

## GENERATION 25 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School:

Name of Sponsoring Entity:

### BACKGROUND

Full Legal Name:

Home Mailing Address:

Phone Number:

E-mail Address:

Business Name:

Business Mailing Address:

Business Phone Number:

E-Mail Address:

Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.

☐ Yes

☒ No, does not apply to me

If Yes, state the name of the entity:

### RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

1. What was your motivation to serve on the board of the proposed charter school?

I've lived and worked my entire adult life in the Pearland/Alvin/Houston area. The community has done so much for me and my family. Over the past 30 years I have been blessed to develop and build communities that provide homes thousands of families.

My next chapter is about building projects that focus not only on the houses or buildings but the people that are living in them. I started Forgotten Angels a dozen years ago because there was a need in our area for services for adult special needs. We now have over 20 group homes with 125 or so disabled adults living in them. We also have a day hab center that serves 70 or so daily members of the vulnerable community. I helped find the talent, build the buildings and create a sustainable revenue stream all designed to support this population, which has been forgotten in many ways. I am currently building an elderly care community in the Alvin/Pearland area that will be unlike anything in the area. This community will provide a place for community, high level care and the ability for elderly couples to live near each other and still receive high levels of care. I am helping to open a church facility in one of our communities with Dr. Nick Ellen because I know what is in his heart and there is a need in the community.



I believe all families should be allowed to choose in which way their children should be educated. I have done extensive research on Classical education schools and in doing so, visited Arizona and saw what an impact the education model was having on kids and families. I was called to put this together and hired a Superintendent that has done this before and who could make this dream a reality. I like the Classical model because it has high expectations for academics and focuses on character education and values and virtues. I have been blessed in my life and feel like this project is part of me giving back to my community. I think the classical model is needed in our area and I want to be a part of bringing this model to local families.

2. What is your understanding of the appropriate role of a public charter school board member?

Our board role at Cato Academy is to ensure the school has a clear direction of where we are going. To support the schools operations and leadership and to use our contacts and resources if needed. Our role would be to monitor and review the school leader and ensure we comply with all the terms of the charter contract and Texas laws.

3. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have never served on a school board so this will be new to me. I have served on non-profit boards including starting up Forgotten Angels and then creating the Forgotten Angels Foundation to support our efforts. In my prior experience, my role was to advise, support with my background and financial support and most importantly to serve our mission. I understand the boundaries of non-profit governing boards and the fiduciary responsibility of my role.

My interest and ability in serving solely falls upon my understanding and knowledge in building, funding, developing and understanding the entire structure of development and functioning from start, to finish, and beyond.

4. Describe the specific knowledge and experience that you would bring to the board.

I have extensive background in start ups of non-profit and for profit companies. All my life I have built projects from idea to functioning and thriving ventures. I find good people, set the direction and provide them tools to be successful. I have public policy experience in dealing with local and state bureaucracies and have had extensive contract negotiation and performance monitoring experience.

## SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

When we worked on our mission and guiding beliefs, we wanted to make sure there was a combining of moral virtues with high academic achievement. I think academics are important but I also think a schools should focus on teaching character, values and virtues. I am behind this effort because I think our state and my area needs a school that teaches the importance of the Golden Rule.

2. What is your understanding of the school's proposed educational program?

I understand the classical education model and it's focus on history and great works of literature. I like the idea of teaching kids to think critically, be able to see through 'fake news' and to be able communicate their ideas. I believe our schools focus on reading, writing and communicating ideas will be important to our students success later in life. I believe that the focus on the art and music is as important as a focus on high academic standards.



3. What do you believe to be the characteristics of a successful school?

Success to me, in our school, looks like reaching our enrollment and financial goals. I think hiring the best teachers and supporting their efforts will be why we are a success. I believe our school will be top rated academically, prioritize relationships between teachers, Principals, families and students. I think success is a school that prepares students to be ready for tomorrow.

4. How will you know that the school is succeeding (or not) in its mission?

I think we can judge success based on how we are received by parents and the community.

## GOVERNANCE

1. Describe the role that the board will play in the school's operation.

To oversee governance and establish goals for the school leader to carry out. On the boards I've served on, I avoid day to day running of thing and prefer to help in areas needed. I think our job as a board is to set a clear path and set of goals to work towards and then to monitor and help where needed.

2. How will you know if the school is successful at the end of the first year of operation?

Success in our first year would look like achieving the goals we laid out in our charter application for enrollment and academics. These goals include enrollment targets, teacher turn over and hiring, financial viability. The first year will be difficult, as all new ventures are. I think our role in the first year is to anticipate issues we've seen in our prior experiences and build out systems that can help the school become a success.

3. How will you know at the end of four years if the school is successful?

By year four, success to me would be meeting our financial goals with reserves in the bank for any unseen financial issues. I would judge our school a success if we were one of the top academic schools in the region and a long wait list of families hoping to enroll.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Regular board meetings. Serving on committees that allow me to lend my experience to. Bringing in outside community resources that I may have that can help the school. I have served on other non-profit boards and will help other board members understand their role of oversight and not operations.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interest of the school?

I would bring up potential ethical issues during the board meetings and address any concerns with the entire governing board. If I did not feel like the issues were addressed I would reach out to the schools lawyer for help.



## DISCLOSURES

1. Indicate whether you (or your spouse) knows the other prospective board members for the proposed school.

☒ Yes

☐ No, I/we do not know these individuals

If yes, describe the precise nature of your relationship.

Dr. Ellen is a friend from the Biblical College that I am helping to start a church in the area. Jignesh is a long time business associate of mine. Jill and I have worked together at Forgotten Angels. I know Brendon from Biblical counseling circles.

2. Indicate whether you (or your spouse) knows any person who is, or has been in the last two years, a school employee.

☐ Yes

☒ No, I/we do not know any such employees

If yes, describe the precise nature of your relationship.

3. Indicate whether you (or your spouse) knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity).

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship and the nature of the business that such person(s) or entity is transacting or will be transacting with the school.

4. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owner, directors, or agents of that provider.

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

5. If the school intends to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider.

☐ Yes

☒ No, I/we or my family do not anticipate conducting any such business.

If yes, describe the precise nature of your relationship.

6. Indicate whether you, your spouse, or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

☐ Yes

☒ Does not apply to me, my spouse, or family.

If yes, describe the precise nature of your relationship.

7. List all business or organizations of which you are a partner or in which you have a majority interest.

RW West Development

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

None

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

☐ Yes

☒ Does not apply to me.

If yes, state the compensation you expect to receive.

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

☐ Yes

☒ Does not apply to me.

If yes, describe the precise nature of your relationship.



11. Will any relative(s) within the third degree of consanguinity or affinity (See definition in question 10.) be employed by or receive any compensation or remuneration from the sponsoring entity, charter school, or the management company of the charter school?

☐ Yes

☒ Does not apply to me.

If yes, provide information relating to the matter(s).

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

☐ Yes

☒ Does not apply to me.

If yes, describe the precise nature of your relationship.

## CERTIFICATION

I, Renée L. McGuire, certify to the best of my knowledge and ability that the information I am providing to the Texas Education Agency as a board member is true and correct in every respect.

Signature

Renée McGuire

Date

1/15/2020

State of

Texas

County of

Brazoria

On this day, January 15, 2020 (name of affiant) appeared before me the undersigned notary public and deposed that he/she executed the above instrument and that the statements and answers contained therein are true and correct to the best of his/her knowledge and belief.

Subscribed and sworn to before 15<sup>th</sup> day of January, 2020.

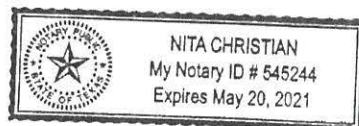
(Notary Public)

Nita Christian

(Seal)

My commission expires

May 20, 2021





## GENERATION 25 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

### BACKGROUND

Full Legal Name: Jignesh Derasari

Home Mailing Address: 3423 Senova Drive, Pearland, TX 77584

Phone Number: 832-350-3531

E-mail Address: jderasari@yahoo.com

Business Name:

Business Mailing Address:

Business Phone Number:

E-Mail Address:

Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.

☐ Yes

☒ No, does not apply to me

If Yes, state the name of the entity:

### RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

1. What was your motivation to serve on the board of the proposed charter school?

As a long time resident of the Pearland area and active member of the business community, I believe our area needs an educational system that blends academic rigor with character development and family engagement. When Renee asked me what I wanted [REDACTED], my answer was that they be in a school that values character education as well as academics. I also believe that parents should have choices in schooling options and think it is important to build a school that gives parents options.

2. What is your understanding of the appropriate role of a public charter school board member?

As a member of the non profit board, my role is to oversee the school leadership, set policy and oversee the academic and financial goals of the charter school. I hope to bring business acumen and experience to the board to ensure we are supporting the school, teachers and students.

3. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have a long history in the operations, executive leadership, accounting and finance, development and growth. I have spent my career in various business operations such as accounting, finance, HR and legal. I have a global view and have lead businesses in Texas and abroad. I hope to bring to the board expertise in the financial disciplines needed to operate our school.

4. Describe the specific knowledge and experience that you would bring to the board.

Accounting, Finance, HR and Legal experiences.

## SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

The mission of the school to provide a rigorous, time tested education, that focuses on character development as well as academic achievement is what makes me want to be a part of the leadership team. The values that we build our school on should permeate every decision we make. From our mission; "We strive to equip and train our teachers with academically excellent tools with the goal of instilling a lifelong love of learning in our scholars" rings true for me as I have found that the success of my businesses has been directly related to the commitment of our team. I want to be involved with a school that values relationships with boundaries.

2. What is your understanding of the school's proposed educational program?

In my discussion with Mrs. McGuire and Mr. Higgins, I understand the classical school model to be one that uses history as the foundation to teach from. Every year, students move to a new time frame in history and all the novels, art, music and science instruction is taught through that lense of history. I appreciate the focus on music, hands on art and athletics. The focus on teacher hiring and advancing teachers in their profession is important to me. From my experience, finding and training top staff is the key to long term success.

3. What do you believe to be the characteristics of a successful school?

For me, a successful school would be one that is meeting their academic and financial goals. I would measure success as achieving success at a high level in both these areas. I think a focus on a culture built on high expectations that prepares students for their continuing education.



4. How will you know that the school is succeeding (or not) in its mission?

I understand that my role on the governing board is to hire the best school leadership we can attract and then support them in their efforts to running the school. Others on the board have backgrounds in academics and I look forward to learning from them. I hope to add my background in operations and systems to the board. If we can set strong academic and financial goals and build in ways to track and measure these efforts, I think we will be able to accurately judge how our school is succeeding towards our mission or not.

## GOVERNANCE

1. Describe the role that the board will play in the school's operation.

I understand that the board's role in school's operations is that of establishing policies and overseeing the operations. Our focus will be on hiring and supporting the best school leaders we can find. The day to day operations of the school will be entrusted to the school Principal and my role will be to hold them accountable. I hope to bring my business operational experience to the table and serve in the best way possible.

2. How will you know if the school is successful at the end of the first year of operation?

Success to me, in the first year, looks like a school that is built on time and on budget. My background will be important to make sure we start with a functioning building at an affordable cost. By the end of year one, I hope to have an experienced Principal hired. By the end of year one, success to me, means that we have achieved our enrollment goals and our financial goals are met. I hope to have hired and trained a strong teaching staff.

3. How will you know at the end of four years if the school is successful?

By the end of four years, we should have strong enrollment and a strong financial picture. I would expect that when I'm in the community that I hear positive feedback of what our school is doing. I would like to see our performance measures clearly defined and our operations meeting these benchmarks. I would expect low teacher turnover. I would expect to be an A rated school academically.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

The governing board is made up of experts in various areas of school operations. Success looks to me like each member bringing their expertise to the school board. I will help the board establish metrics that we can use to survey the stakeholders (family, teachers and perhaps students) as to how we are doing as a school. I would like to be intentional about our future and be a part of the discussions about expansion into the proposed second phase or regarding expanding to new locations.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interest of the school?

If one of our board members were acting unethically or not in the best interest of the board, I would raise my concerns to the chair of the board. If the chair is the member in question, I would raise the issue with the school's attorney. I have seen a number of unethical situations in my professional career and I have learned to address these types of issues head on and gather facts without rushing to judgment. My role would be to

state my concerns to legal counsel and support their efforts in correcting or removing the board member in question.



## DISCLOSURES

1. Indicate whether you (or your spouse) knows the other prospective board members for the proposed school.

☒ Yes

☐ No, I/we do not know these individuals

If yes, describe the precise nature of your relationship.

I am a business associate with Renee McGuire.

2. Indicate whether you (or your spouse) knows any person who is, or has been in the last two years, a school employee.

☐ Yes

☒ No, I/we do not know any such employees

If yes, describe the precise nature of your relationship.

3. Indicate whether you (or your spouse) knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity).

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship and the nature of the business that such person(s) or entity is transacting or will be transacting with the school.

4. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owner, directors, or agents of that provider.

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

Not applicable because the school does not intend to contract with an education service provider or

☒ school management organization.

5. If the school intends to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider.

☐ Yes

☒ No, I/we or my family do not anticipate conducting any such business.

If yes, describe the precise nature of your relationship.

6. Indicate whether you, your spouse, or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

☐ Yes

☒ Does not apply to me, my spouse, or family.

If yes, describe the precise nature of your relationship.

7. List all business or organizations of which you are a partner or in which you have a majority interest.

JAPS Holdings, LLC. - JAPS-R Holdings, LLC. - JSPS Web Sales, LLC.

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

None

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

☐ Yes

☒ Does not apply to me.

If yes, state the compensation you expect to receive.

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

☐ Yes

☒ Does not apply to me.

If yes, describe the precise nature of your relationship.



11. Will any relative(s) within the third degree of consanguinity or affinity (See definition in question 10.) be employed by or receive any compensation or remuneration from the sponsoring entity, charter school, or the management company of the charter school?

☐ Yes

☒ Does not apply to me.

If yes, provide information relating to the matter(s).

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

☐ Yes

☐ Does not apply to me.

If yes, describe the precise nature of your relationship.

## CERTIFICATION

I, Jignesh Derasani, certify to the best of my knowledge and ability that the information I am providing to the Texas Education Agency as a board member is true and correct in every respect.

Signature

Jignesh Derasani

Date

1/16/20

State of

Texas

County of

Brazoria

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

Subscribed and sworn to before 16<sup>th</sup> day of January, 2020.

(Notary Public)

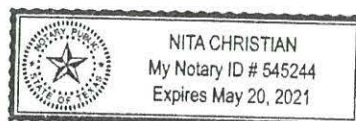
Nita Christian

(Seal)

My commission expires

May 20, 2021

Page 008





## GENERATION 25 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

### BACKGROUND

Full Legal Name: Jill Shockley

Home Mailing Address: 303 Dukes Bend Stafford TX, 77477

Phone Number: 832-243-5925

E-mail Address: jshockley@forgottenangels.org

Business Name: Forgotten Angels Foundation

Business Mailing Address: 7918 Broadway St. Suite 104

Business Phone Number: (281) 993-5500

E-Mail Address:

Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.

☐ Yes

☒ No, does not apply to me

If Yes, state the name of the entity:

### RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

1. What was your motivation to serve on the board of the proposed charter school?

[REDACTED], I want to be a part of a school that focuses on strong parental relationships, educates the whole child (academics and character) and provides a choice to the families of the Alvin area. I think all children and different and our model provides options for some families that are not currently available. With my background with the Alief ISD and as Life Enrichment Director at Forgotten Angels, I have seen day in and day out the unique needs of special needs people. I want to make sure that I bring to the school the importance of addressing the needs of the special education student. I have watched for years how people like Renee McGuire can impact the lives of those in need of dignity and respect and want to continue to be a part of that impact in the school setting.

2. What is your understanding of the appropriate role of a public charter school board member?

My role as a board member will be to set policy for the school and hold the school leadership accountable to execute on board policies. I understand that our role as a governing board is to manage the financial health and academic goals that are detailed in our charter application. I hope to bring my experience in K12 education and with special needs students to the governing board and ensure we are doing all we can for students.

3. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have been an educator and serving special needs students for over 20 years. From the Lufkin State School to the special education team at Alief ISD [REDACTED], I believe I can bring experience and expertise to the board of Cato Academy. I have served on a number of non-profit boards including Scout/Parent Unit Coordinator, Boy Scouts of America, 2008-2017, the Women's Leadership Team, Bethel Church of Houston, 2014-Current and Bible Study Leader, Bethel Church of Houston, 2015-Current.

4. Describe the specific knowledge and experience that you would bring to the board.

I hope to bring an expertise in how to best serve the special needs population in our school. I believe my background and first hand experience will help to elevate the importance of the special needs students and to ensure that we are going above and beyond to meet their needs. As a teacher, I hope to be a voice on the board to the unique struggles and triumphs experienced by our teachers.

## SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

The schools mission and values statements align with what I believe is important in a school today. I appreciate the blend of character development and social emotional learning with academics. I elected to home school my children for a number of reasons, but character, values and virtues were important to our family and we wanted to make sure we gave our kids a firm foundation in academics and character education. The classical model and our schools mission statement focuses on relationships and bringing together a school that focuses on educating the whole child.

2. What is your understanding of the school's proposed educational program?

I understand that our schools education plan is heavily focused on the learning, interpretation and sharing of ideas. An education in the humanities, which is what our school will focus on, is an area that I think is much needed in our area. I was exposed to the classical education model and incorporated aspects of it in my home school curriculum. The philosophy of Charlotte Mason's on read alouds, nature study, hands on learning, big discussions and that students come to us already knowing much are all beliefs that I think will make our school a success.



3. What do you believe to be the characteristics of a successful school?

For me, a successful school is one where we are graduating 8th graders that have the ability to think critically and express their ideas. I want them to be ready for high school and beyond. Success to me looks like a school that becomes a community center that is built on relationships with teachers, families and neighbors. Success to me personally would be developing our special needs students to the highest of their ability. I want to make sure our school educates these students to the highest standards.

4. How will you know that the school is succeeding (or not) in its mission?

Success towards our schools mission for me looks like we are partnering with parents and not replacing them. I hope that the parents that chose us know that we are all working towards a common goal of preparing our students for the future. I hope to be a voice for the teachers and keep the board focused on their training and support. In all my years in public schools, the happiness of the teachers directly related to the academic outcomes.

## GOVERNANCE

1. Describe the role that the board will play in the school's operation.

I understand that we are a policy setting board and will work on building systems and policies that are compliant and measurable. I hope to make myself a resource on the areas that I have experience with (teaching and special needs) and will serve as needed.

2. How will you know if the school is successful at the end of the first year of operation?

Success at the end of the first year for me, would look like a school that is beginning to start a strong culture of caring teachers that come together as a team to deliver high quality classical education. At the end of the first year, I would view success as our school as happy teachers that are growing and excited about impacting kids lives.

3. How will you know at the end of four years if the school is successful?

By the fourth year, I would expect that our academic program is one of the top schools in the region. I hope to see a vibrant and active parent community. By year four, I would like to see strong enrollment and teachers that are growing in their profession . I would hope that our school is the place to enroll students with special needs because we super serve these kids and help them grow as individuals.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

I think the governing boards role is to encourage and support the schools efforts by supporting the school leaders and teachers. Our role of approving policies that make sure we are compliant and that we are measuring the right things.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interest of the school?

With respect to unethical situations, I would make the board chair aware of improper actions.



## DISCLOSURES

1. Indicate whether you (or your spouse) knows the other prospective board members for the proposed school.

☒ Yes

☐ No, I/we do not know these individuals

If yes, describe the precise nature of your relationship.

Renee McGuire and I have a long history at Forgotten Angels.

2. Indicate whether you (or your spouse) knows any person who is, or has been in the last two years, a school employee.

☐ Yes

☒ No, I/we do not know any such employees

If yes, describe the precise nature of your relationship.

3. Indicate whether you (or your spouse) knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity).

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship and the nature of the business that such person(s) or entity is transacting or will be transacting with the school.

4. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owner, directors, or agents of that provider.

☐ Yes

☒ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

Not applicable because the school does not intend to contract with an education service provider or

☒ school management organization.

5. If the school intends to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider.

☐ Yes

☒ No, I/we or my family do not anticipate conducting any such business.

If yes, describe the precise nature of your relationship.

6. Indicate whether you, your spouse, or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

☐ Yes

☒ Does not apply to me, my spouse, or family.

If yes, describe the precise nature of your relationship.

7. List all business or organizations of which you are a partner or in which you have a majority interest.

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

I have not served on any other charter school boards.

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

☐ Yes

☒ Does not apply to me.

If yes, state the compensation you expect to receive.

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

☐ Yes

☒ Does not apply to me.

If yes, describe the precise nature of your relationship.



11. Will any relative(s) within the third degree of consanguinity or affinity (See definition in question 10.) be employed by or receive any compensation or remuneration from the sponsoring entity, charter school, or the management company of the charter school?

☐ Yes

☒ Does not apply to me.

If yes, provide information relating to the matter(s).

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

☐ Yes

☐ Does not apply to me.

If yes, describe the precise nature of your relationship.

## CERTIFICATION

I, Jill Shockley, certify to the best of my knowledge and ability that the information I am providing to the Texas Education Agency as a board member is true and correct in every respect.

Signature

Jill Shockley

Date

1/15/2020

State of

Texas

County of

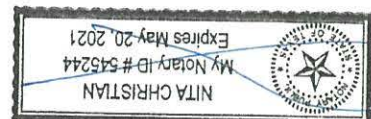
Brazoria

On this day, Jill Shockley (name of affiant) appeared before me the undersigned notary public and depose 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.

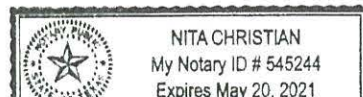
Subscribed and sworn to before 15<sup>th</sup> day of January, 2020.

(Notary Public) Nita Christian (Seal)

My commission expires May 20, 2021



Page 216





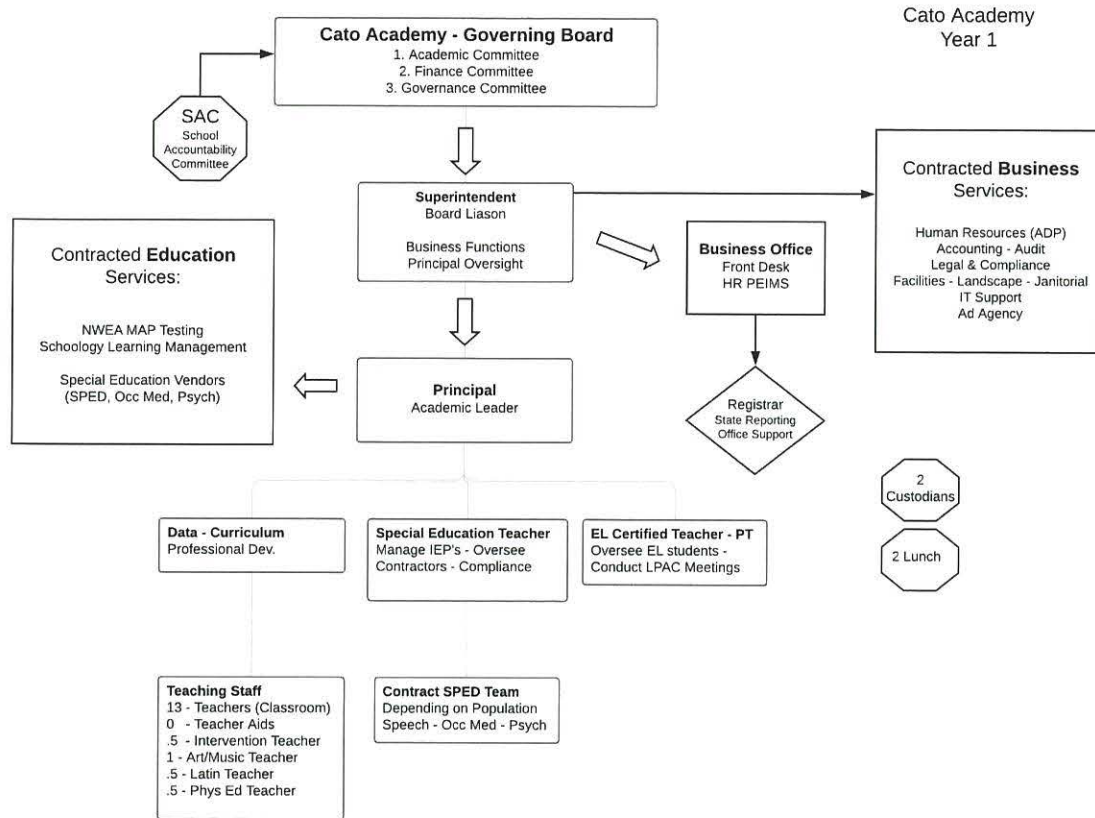
### **Attachment 13: Organizational Charts for Year 1 and Full Capacity**

Submit two organizational charts that show the school's governance, management, and staffing structures: (1) one organizational chart will represent the school's structure during Year 1; and (2) the second chart will represent the school's structure at full capacity. If the organizational structure is not projected to change during the 5-year initial contract period, include a statement to indicate that the same organizational chart will apply in Year 1 and at full capacity.

Each organizational chart must clearly delineate the roles and responsibilities of—and lines of authority and reporting among—the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the school. The organizational charts must also document clear lines of authority and reporting within the charter school.

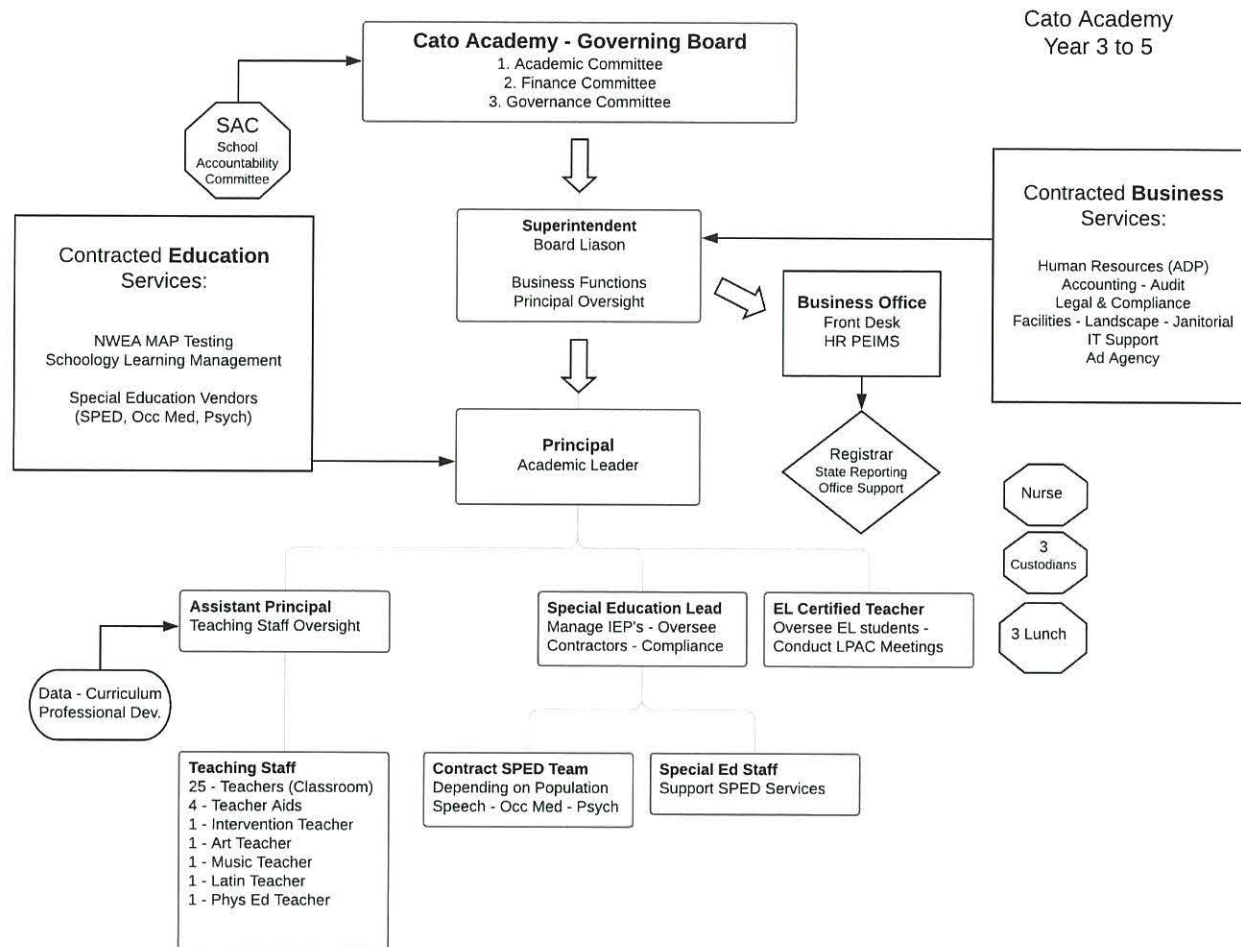
All positions listed on the organizational charts must be noted on the Staffing Chart provided in Attachment 22 and have a corresponding Supplemental Human Resources Information Form submitted in Attachment 23.

#### **Proposed Organization Chart – Year 1**



## Proposed Organization Chart – Year 3 and beyond





## Notes:

The **School Accountability Committee (SAC)** is advisory only. Their make up includes one or more parents, one or more teachers, the school administrator and outside expertise as needed. Their primary role is to advise the Governing Board on needs or issues at the school. They conduct a once annual stakeholder survey using the Net Promoter Score platform.

The **Academic Accountability Committee (AAC)** not shown. Is convened quarterly and made up of the school Principal, Vice Principal, Data Curriculum Professional Development Director, Special Populations team and master teachers. Their role is to review the teachers analysis of the NWEA-Map benchmark assessments (within the 8 Step Teacher Data Framework) and make recommendations to improve academic performance to the Principal. Their report is provided ot the Governing Board's Academic Committee four times per year.

## Attachment 14: Superintendent Evaluation Tool(s)

Provide any superintendent evaluation tool(s) that have been developed.

Cato Classical Academy Superintendent Evaluation Form

### General Information<sup>49</sup>

Priority Performance Goals for the superintendent form the primary focus of the Governing Boards annual evaluation of the Superintendent. These goals should be developed in relation to established district goals or other priorities established by the board for the superintendent.

The Evaluation Instrument consists of three parts:

- 1) Report on student performance within the framework of the Texas Charter FIRST framework for **Academics**,
- 2) Key performance indicators that are outlined under **Financial** and **Operational** metrics of the Texas Charter FIRST annual survey, and
- 3) Other Superintendent, management responsibilities set forth by the Cato Academy Governing Board.

In completing the evaluation, the board will consult data provided by the superintendent and other legally appropriate data the board deems relevant. The initial metrics which the board will monitor include:

- State of Texas STAAR results, in particular 3<sup>rd</sup>, 5<sup>th</sup> and 8<sup>th</sup> grade end of year scores. The review will include overall academic performance, closing the gap measures and special populations (special ed and EL scholars).
- Net Promoter Score survey's from stakeholder groups including parents, teachers and administrators. Conducted by the stakeholder lead School Accountability Committee (SAC).
- Teacher turn over and exit survey reporting.
- Annual auditor's report from a third party auditing firm.
- Legal actions and their resolution or progress.
- Academic Accountability Committee reporting, follow up and execution. Including NWEA-Map benchmark analysis.

In assessing performance on both the goals and the ongoing responsibilities, the board will consult data provided by the superintendent on a form that encompasses data referred to in the annual goals directive from the board, and other data the board as a whole deems relevant to the assessment. At the start of the evaluation cycle, the board and superintendent shall agree upon the process for evaluation and weight given to each part. In determining the Superintendent, the Governing Board will review the most up to date criteria form TEA on Superintendent evaluation. In particular 19 Tex. Admin. Code § 150.1031 requires that a student performance domain, "at a minimum," be considered in the evaluation. In addition, the information in a charters annual performance report as set forth in Tex. Educ. Code § 39.306 must be a primary consideration of the board for the superintendent's evaluation. Tex. Educ. Code § 39.307(3)(C).

The function of the assessment of ongoing responsibilities is both to assess general management performance and to assist the board and superintendent in identifying issues and areas they may wish to address during the following evaluation year.

Rating Scale:

E      Exceptional

Progress exceeds expectations and criteria noted in the

---

<sup>49</sup> Texas Association of School Board Framework and best practices. <https://www.tasb.org/>



|   |                   |  |
|---|-------------------|--|
| P | Proficient        | instrument<br>Progress meets the expectations and criteria noted in the instrument |
| N | Needs Improvement | Progress does not meet the expectations and criteria noted in the instrument       |

Comments may be made on any item. Any rating of “Needs Improvement” must be accompanied by a comment indicating the nature of the deficiency or a statement of what the board expected to see in performance that was not evident.

## Proposed Format (With research from The American Association of School Administrators<sup>50</sup> and Texas Association of School Boards)

### Assessment of Ongoing Responsibilities Educational Leadership

The superintendent provides leadership and direction for an educational system that is based on desired student achievement.

**A. Instructional Management:** The superintendent manages an assessment and improvement system for student learning in the major academic subjects that results in the ongoing improvement in student achievement. The board shall see:

- Information on how the district determines deficiencies or areas for improvement in instruction and curriculum.
- An annual report of instructional areas needing attention, as revealed by the system.
- Annual reports of remediation and instructional improvement efforts implemented, cost, progress, and results as they become available.
- A trend of ongoing improvement as reflected in longitudinal data on student scores.

**Rating:**

**Comments:**

**B. Student Services Management:** The superintendent oversees a program of student services, tied to defined goals and objectives. The board shall see:

- Annual goals, targets, or benchmarks and rationale behind them, for counseling services, health and safety programs, extracurricular programs, and students’ discipline.
- Semi-annual monitoring reports for student services programs, related to goals and targets.

**Rating:**

**Comments:**

**C. Staff Development and Professional Growth:** The superintendent oversees a program of staff development designed to improve district performance. The board shall see:

- An annual summary of the staff development plan, including goals for the program tied to district assessment data and staff appraisal data, and administration-defined measures for assessing program success.
- An annual report on the success of the staff development program as demonstrated by administration-defined measures.

**Rating:**

<sup>50</sup> DiPaola, M. Evaluating the Superintendent A white paper from the American Association of School Administrators. Michael F. DiPaola, Ed.D. American Association of School Administrators, 2010

## Comments:

### Charter Management

The superintendent demonstrates effective planning and management of the district administration, finances, operations, and personnel.

**A. Facilities and Operations Management:** The superintendent maintains a management system designed to produce ongoing efficiencies in major district operations, including transportation, food services, and building maintenance and operations. The board shall see:

- Annual goals, targets, or benchmarks and the monitoring process, to be used by administration to assess efficiency in the targeted areas.
- An annual report on success in terms of the goals, including longitudinal data.
- A general trend toward improvement in each area, as defined by the goals, targets, and benchmarks used.

### Rating:

### Comments:

**B. Fiscal Management:** The superintendent manages a budget development, implementation, and monitoring process that reflects sound business and fiscal practices and that supports district goals. The board shall see:

- Budget assumptions and priorities, prior to development of the budget.
- Contingency plans for addressing any anticipated changes in district circumstances that could affect district finances in future years.
- Recommended budget in line with established assumptions and district priorities.
- Quarterly financial reports showing implementation compared to adopted budget.
- End of year results that are generally consistent with adopted budget.
- Administrative procedures instituted to reduce the risk of fraud.

### Rating:

### Comments:

**C. Human Resources Management:** The superintendent oversees a comprehensive human resources program (recruitment, retention, staffing organization, compensation and benefits, staff recognition and support), tied to defined goals and targets developed by administration for board review. The board shall see:

- An annual list of goals, targets, or benchmarks for human resource services, related to one or more of the major functions listed above.
- An annual report of district success toward meeting the year's goals, targets, or benchmarks.

### Rating:

### Comments:



## Board and Community Relations

The superintendent maintains a positive and productive working relationship with the board of trustees and the community.

**A. Board Relations:** The superintendent maintains a positive and productive working relationship with the board of trustees. The board shall see:

- Evidence that during the prior evaluation year the board was kept informed of significant issues as they arose.
- Evidence that during the prior evaluation year the superintendent responded in a timely and complete manner to board requests for information that were consistent with board policy and established procedures.
- Recommendations and appropriate supporting materials on matters for board decision.
- Evidence that the superintendent's actions appropriately supported board policy and decisions with the staff and community.

**Rating:**

**Comments:**

**B. Community Relations:** The superintendent maintains a positive and productive working relationship with the community. The board shall see:

- Information detailing the district's internal and external communication strategies.
- Evidence of methods for community and business involvement in schools. Evidence of methods or programs to encourage community and business participation in and with the school district.

**Rating:**

**Comments:**

## **Attachment 15: Résumé and Qualifications for Proposed Superintendent**

Complete **either** Attachment 15 or Attachment 16 depending on whether or not the superintendent has been selected.

Write “N/A” on the cover page of the attachment that is not completed.

### **Identified Superintendent:**

Superintendent who has been identified and hired is Mr. Joe Higgins. Mr. Higgins was one of the founders and served for five years as CEO of Leman Academy of Excellence. Leman Academy was the fastest growing charter network in Arizona history when he left in 2018. All the ranked schools in the network were at A or B under the Arizona and Colorado grading system. In January 2018, Joe left the position of CEO after opening 6 campuses in Arizona and Colorado with a staff of 425 and 4500 students enrolled. Under his leadership, the network doubled in enrollment every year, the teacher retention rate was 90% and he developed over \$80m in real estate.

As Superintendent of Leman Academy Mr. Higgins systematized the processes needed to successfully manage the major elements of opening and operating a Classical Education charter school including; Curriculum planning and resources, Character Education and social emotional education integration, Teacher/Admin training, New School Launch Support (financing, board governance training, construction), School Operations (HR, Special Ed, Lunch Program, Front Office etc.). Mr. Higgins will have his Masters in Education Leadership (MEd) by June of 2020.

Over the past 20 years Joe has founded and grown over a dozen businesses in multiple fields. He has served for 13 years on the Governing Board of Salpointe High School a 70 year old, private college prep school as well as 2 years as a Governing Board member with Pima Prevention Partnerships, a 3 campus, at risk recovery charter high school with locations in Tucson and Phoenix. He is on the advisory boards of a private high special needs school, Rockwood Prep. He was Board Chair of Southwest University of the Visual Arts, an HLC accredited arts college, and he navigated the 30 year school from profit to non-profit status. In the non-profit governance arena, he serves on the board of trustees with Roman 12 Ministries. He was the prior chair of Arizona Small Business Association, Arizona’s largest trade group.



## Joseph “Joe” T. Higgins

joe@joehigginsinc.com C 520-631-7400

### PROFESSIONAL EXPERIENCE

#### **LEMAN ACADEMY of EXCELLENCE, Tucson, AZ.**

Leman is the fastest growing start up Charter school chain in Arizona history. Locations are opened in Arizona (Tucson, Mesa, Sierra Vista) and Colorado (Denver). LAE opened their first campus in 2015 and currently has 4500 scholars enrolled. Under his leadership, the rated campuses in AZ and CO were “A” or “B”. The education model is Classical Education.

##### **CEO/Superintendent - Direct responsibilities include:**

- Hiring and training of a staff of over 420 teachers, leaders and support staff
- Professional Development program that boast 90% teacher retention rate
- Site selection and development of over \$80m of real estate in 6 campuses in two states.
- Secured financing through Developer and Investment Banking via municipal bond market.
- Public policy experience that helped obtain Charter contracts with various state agencies,
- Development of proprietary curriculum aligned Classical Education and State standards.
- Expansion into the homeschooler (Virtual Academy) and PreK markets.
- Governance and Board Compliance, Training and Reporting
- Brand design and marketing and management

The leadership model of the organization is based on Robert Greenleaf’s Servant Leader concepts. Leman Academy has been named the “Best Charter School” “Best Community Culture” and “Best Place To Work” (Arizona Daily Star 2015-2017) and “Best School” and “Best Place To Work” (Sierra Vista Daily Herald).

**Chief Executive Officer, 2013-2018**

#### **QUALITY OF LIFE MEDICAL GROUP, Tucson, AZ.**

Mid size general medical and specialty care organization with general practitioners, internists, anesthesiologist, and mid level providers. Quality of Life Research - Clinical medical research company focusing on 1<sup>st</sup> through 4<sup>th</sup> stage pharmaceutical and device medical research

**Chief Operating Officer, 2008 – 2013**

#### **TIBURON DIAGNOSTIC LABORATORY – Tucson, AZ.**

Tiburon Labs was a 10 year old diagnostic lab. Managed the turnaround of this full service, high complexity, lab which offered 24 hour service in Chemistry, Hematology and Microbiology.

**Chief Executive Officer – 2009-2012**

### **START UP & ENTREPRENURIAL EXPERIENCE**

#### **1998 to 2016**

- **Gotta Go Wireless CEO** - founded in 1998 which grew from direct sales wireless phone distributorship to a 12 store chain in two states with 80+ employees and sales of \$2.1 million.
- **Sports Buzz Haircuts CEO** - was founded in 2003 and has grown to 9 locations employing 55+, in Tucson AZ. Franchise offering circulars, operation manuals and licensing agreements are in place to franchise the concept around the southwest.
- **Silverbell Pavilion** – Developer of mid size retail center located on Tucson’s west side. Procured the land, secured financing, managed all construction and leasing.
- **Talking Trash Waste Removal** - was founded in 2004 and is a mid size trash company with commercial and residential divisions. Sold in 2013

- **Rainmaker Medical** – CEO Consulting and service provider to medical practices in Tucson and Phoenix. The company places technicians in medical practice to manage complex services.

#### **EDUCATION BOARDS & COMMISSIONS**

**Pima Prevention Partnership** – Alternative Charter Middle/High School – New Board Member

**Salpointe High School** – Board Member – Executive Committee – 13 year member - College prep.

**Southwest University of Visual Arts** – HLC Accredited - 4 Year University – Board Chair

**Banner Hospital Merger** - Appointed by Gov. Brewer to oversee the \$1 billion merger of the University of Arizona Hospital to Banner Health's hospital network.

#### **COMMUNITY INVOLVEMENT**

**Arizona Small Business Association** – Board President of 40 year old, group. Launched and chaired ASBA's public policy efforts to affect small business issues at a state level. ASBA was Arizona's largest trade association with 11,000 members.

**Catholic Community Services** – VP Board Member for 6 years of a \$35m social service agency.

**Pima County Board of Supervisors** – Candidate for public office 2008 – lost in primary.

**Tucson Chamber Of Commerce** –2004 Small Business Leader of the Year

**Arizona Daily Star** –2005 40 Under 40 inaugural honoree.

**Business Leader of the Year** – Arizona 2008 – Marketing – ASBA

**Banner Health of Arizona** – Clinical Research - Institutional Review Board – Member - Current

#### **EDUCATION**

**BA**, University of Arizona 1993, Tucson, AZ.

**M.Ed.**, Western New Mexico University. Graduate June 2020.



## **Attachment 17: Résumé(s) and Qualifications for Proposed Instructional Leadership Team**

Provide all résumés and qualifications of the instructional leadership team members who have been selected. Clearly indicate the position that is associated with each résumé. If some of the instructional leadership team members have been selected, but some have not, complete this attachment for those who have been selected and complete Attachment 18 for positions that do not currently have candidates identified.

If none of the instructional leadership team members have been selected, write “N/A” on this Attachment and complete Attachment 18.

N/A

## Attachment 18: Job Descriptions or Qualifications for Instructional Leadership Team

Provide all job descriptions or qualifications of the instructional leadership team members who have not yet been selected. If some of the instructional leadership team members have been selected, but some have not, complete Attachment 18 for those who have been selected and complete this Attachment for positions without identified candidates.

Supplemental human resources information forms are required for each position on the staffing chart (Attachment 23). If all applicable information related to a specific position's job description is included on those forms, include a note on this attachment that lists the relevant instructional leadership team position together with a reference to the appropriate page number in Attachment 23.

### Instructional Leadership Team Job Descriptions

#### **PRINCIPAL**

**General Job Description:** The Academic Leader of Cato Academy, called Principal, shall assume responsibility for the general leadership and administration of the K8 school consistent with Governing Board approved mission, philosophy, guiding principles, policies, and annual budgetary commitments/constraints.

**Line of Authority/Reports to:** Cato Academy Principal shall be directly accountable to the Superintendent.

**Works with:** Superintendent and Supervises; Assistant Principal, Business Manager (day to day), Athletic Coaches, Director of Instruction, Faculty, Support Staff, Nurse, Families and Scholars of Cato Academy.

#### **Areas of Responsibility:**

##### ***To include, but not limited to:***

1. Provide leadership, guidance and encouragement to faculty and staff
2. Provide written evaluations on all teaching and instructional personnel with the school
3. Orient and assist new hires
4. Conduct faculty and staff meetings using planned and written agendas
5. Conduct regular In-service training for teachers
6. Provide direction, coordination and supervision to ensure the academic staff develop and align the curriculum maps, with their sequence of essential learning outcomes, assessments, resources, purchased instructional materials, to Texas State Standards
7. Provide leadership including direction and supervision with the articulation and annual revision of the curriculum document and the selection and use of instructional materials and equipment. Establish and lead the Academic Accountability Committee (AAC).
8. Provide direction, coordination and supervision to collect, organize and analyze data related to the school educational program in order to assess student learning and development. Understand the nuances of NWEA-Map benchmark assessment tools.
9. Promote and provide direction to the academic staff toward the development of specific and measurable goals for scholar achievement. Implement the Cato Academy – 8 Step Teacher Data Assessment plan.



10. Provide direction, coordination and supervision to ensure curriculum mapping/scope and sequence documents that connect to the essential learning outcomes through instructional planning for each subject area at each grade level is implemented
11. Provide instructional leadership for outcomes, providing faculty and staff leadership and collaboration with curriculum, instruction and assessments
12. Provide instructional leadership by providing formal and informal evaluations of the teaching faculty.
13. Develop and implement teacher observation tools using the LoTi teacher pop in evaluation system.
14. Oversee and direct the mentoring of new teachers
15. Ensure all necessary supplies, textbooks, and resources are ordered
16. Ensure a safe and orderly environment
17. Plan and conduct faculty and staff meetings
18. Develop and implement school calendar that complies with the State of Texas rules for full time minutes and days of instruction.
19. Ensure proper supervision of scholar activities and events
20. Coordinate special events such as award ceremonies, graduation ceremony
21. Provide leadership, guidance and encouragement to parents and scholars
22. Work with the Registrar to prepare and plan enrollment, re-enrollment process
23. Facilitate the clarification and resolution of conflicts between parents and teachers
24. Cooperate and work with the community in the use of school facilities
25. Develop positive relationships and make appropriate use of parent volunteers
26. Promote the proper conduct, behavior and discipline conducive to having an excellent learning environment
27. Assist new scholars with orientation to school
28. Discipline scholars as necessary in the form of being fair and consistent
29. Provide scholars an excellent, positive, encouraging role model
30. Provides oversight of mandated State testing

### ***ASSISTANT PRINCIPAL***

**General Job Description:** The Assistant Principal serves as a member of the Administrative Team of Cato Academy. The Assistant Principal, slated to hire in year 2, based on enrollment targets will be a strong academic leader and assist the Principal and the Superintendent with the general leadership and administration of Cato Academy. The VP will be hired and adhere to the approved mission, philosophy, guiding principles, policies, and annual budgetary commitments /constraints.

**Line of Authority/Reports to:** Assistant Principal shall be directly responsible to the Principal of Cato Academy.

**Works with:** Principal, Business Manager, Data/Curriculum/PD Director, Faculty, Support Staff, Families and Scholars of Cato Academy.

#### **Areas of Responsibility:**

***To include, but not limited to:***

1. Implement Board created policies
2. Assists with supervision of personnel
3. Provide leadership, guidance and encouragement to faculty and staff

4. Supervise those personnel assigned by the Principal
5. Provide written evaluations on personnel as assigned by the Principal
6. Assist with orientation of new hires
7. Assist in creating job descriptions and evaluation instruments
8. Conduct meetings using planned and written agendas
9. Create and assign duties and schedules for faculty and staff
10. Ensure curriculum mapping/scope and sequence documents that connect to the essential learning outcomes through instructional planning for each subject area at each grade level is implemented
11. Assist with development of school curriculum as needed
12. Assists with providing instructional leadership for outcomes, providing faculty and staff leadership and collaboration with curriculum, instruction and assessments
13. Assist with formal and informal evaluations of the teaching faculty
14. Assist with the mentoring of new teachers
15. Assist with developing a comprehensive and well planned professional development program to increase school academic output
16. Provide input toward preparation of annual budget
17. Develop and implement class and teacher schedules
18. Develop and monitor duty schedules
19. Generate report cards and progress reports
20. Conduct faculty and staff meetings when delegated by Principal
21. Approve Field Trips
22. Assist with proper supervision of scholar activities and events
23. Help facilitate the clarification and resolution of conflicts between parents and teachers
24. Encourage the use of community resources
25. Initiate and evaluate parent surveys and exit surveys
26. Assist as needed with presenting the school vision and program to the community
27. Work with administrative team to plan and hold functions
28. Assist with preparation of scholar activities and events within the school
29. Assist new scholars with orientation to school
30. Discipline scholars as necessary in the form of being fair and consistent
31. Provide scholars an excellent, positive, encouraging role model
32. Assists Principal with oversight of State mandated testing

## **DATA CURRICULUM PROFESSIONAL DEVELOPMENT DIRECTOR**

**General Job Description:** The Director of PD-Curriculum serves as a member of the Administrative Team of Cato Academy and will work as a colleague with classroom teachers to support scholar learning and teacher practice. The PD-Curriculum Director will focus on individual and group professional development that will expand and refine the understanding about research-based effective instruction. In order to meet this purpose the PD-Curriculum Director will provide personalized, one-to-one support that is based on the goals and identified needs of individual teachers. This position also will oversee all the benchmark testing and end of year Texas STAAR State Exams. They will help the teachers interpret their data and ensure the differentiation is occurring as prescribed in the classroom. This position will also oversee the Intervention team to ensure smooth hand offs of scholars into and out of intervention services.



This candidate must understand TEKS standards and Texas education law aspects of quality instruction.

**Line of Authority/Reports to:** The PD-Curriculum Director shall be directly responsible to the Principal of Cato Academy in year one and to the Vice Principal once hired. This position works closely with the Principal and Vice Principal to make sure that the school's academic targets are being achieved. This position serves on the Academic Accountability Committee (AAC) and ensures teachers understand and follow the 8 Step Data Interpretation Plan.

**Works With:** Principal, Vice Principal, Faculty, Special Populations Teachers, and Families of Cato Academy.

### ***Director of Instruction***

Areas of Responsibility and minimum qualifications to include, but not limited to:

1. A Master's in Educational Leadership or equivalent
2. At least two years of successful teaching experience
3. Proven leadership ability promoting collaborative decision making
4. Strong verbal, written, and interpersonal communication skills to positively impact community, parents, scholars, administrators, faculty, and staff
5. Strong commitment to supporting and safeguarding the principles of excellence in education
6. Working knowledge of learning theory, instructional methodology, curriculum development, teacher observation/evaluation
7. Understanding of school finances and operational budget
8. Ability to manage conflict resolution with an attitude of humility and service
9. Working knowledge and understanding of Texas State Standards (TEKS)
10. Working knowledge and understanding of computers and computer software applications such as word processing, spreadsheets and other applications tailored to specific departmental needs
11. Working knowledge of Student Information Systems and Learning Management Systems in particular Schoology.
12. Assist Principal with oversight of State mandated testing.

## **Attachment 19: Leadership Evaluation Tool(s)**

Provide any leadership evaluation tool(s) that have been developed.

The Cato Academy Governing Board will delegate the evaluation and management on the school Principal to the Superintendent. The Superintendent will annual review the Principal in accordance to the Texas Principal Evaluation System (T-PESS) to assess the principal's performance in relation to the Texas Principal Standards.

As described in Texas Education Code (TEC) Section 21.3541: the Principal Evaluation Tool will:

- establish and administer a comprehensive appraisal and professional development system for public school principals
- establish a consortium of nationally recognized experts on educational leadership and policy to: o assist in developing the system o make recommendations about the training, appraisal, professional development, and compensation of principals
- establish school leadership standards and a set of indicators of successful school leadership to align with such training, appraisal, and professional development.
- use only money available from private sources that may be used for that purpose. The principal will take the lead in conducting the evaluation through the use of self-assessment, reflection, and input gathered from various stakeholders with an interest in the leadership of the school. The evidence and documentation gathered by the principal is not intended to become a portfolio. Rather, it should provide a basis for self-assessment, goal setting, professional development planning, and demonstration of performance on specific standards.

The Cato Academy Governing Board will adopt the The State of Texas provided Principal Evaluation Tools will provide a standardized principal evaluation system which will:

- serve as a measurement of leadership performance,
- guide the Principal as they reflect upon and improve their effectiveness,
- focus the goals and objectives of the school as we support, monitor, and evaluate our principal,
- guide professional development for the principal
- serve as a tool in developing coaching and mentoring programs for our principal



## Cato Classical Academy - Principal Evaluation Form - (based on T-PESS)



| <b>Standard 1 – Instructional Leadership:</b> The principal is responsible for ensuring every student receives high-quality instruction.  | Distiguated | Accomplished | Proficient | Developing |
|---|-------------|--------------|------------|------------|
| Curriculum and Assessment   |             |              |            |            |
| High quality instruction  |             |              |            |            |
| Data informed instruction and Intervention  |             |              |            |            |
| Student Growth – Including Subpopulations   |             |              |            |            |
| <b>Standard 2 – Human Capital:</b> The principal is responsible for ensuring there are high-quality teachers and staff in every classroom throughout the school.                        | Distiguated | Accomplished | Proficient | Developing |
| Teaching Staff – Recruit Train and Retain   |             |              |            |            |
| Collaboration with a Leadership Track for quality teacher   |             |              |            |            |
| Evaluates with Clear Outcomes and Multiple Data Points  |             |              |            |            |
| <b>Standard 3 – Executive Leadership:</b> The principal models personal responsibility and a relentless focus on improving student outcomes.  | Distiguated | Accomplished | Proficient | Developing |
| Solutions oriented and Continuous Improvement   |             |              |            |            |
| Proactive focus on issues – Creative ways to improves student outcomes  |             |              |            |            |
| Relationship focuses and communicates with all audiences  |             |              |            |            |
| Follows Texas Code of Conduct and Moral Leadership  |             |              |            |            |
| <b>Standard 4 – School Culture:</b> The principal is responsible for establishing and implementing a shared vision and culture of high expectations for all staff and students.         | Distiguated | Accomplished | Proficient | Developing |
| Shared vision of high outcomes for all students –   |             |              |            |            |
| Models clear expectations –Social and emotional learning  |             |              |            |            |
| Engages families in meaningful learning experiences   |             |              |            |            |
| Safe school for social and emotional well being of all concerned  |             |              |            |            |
| Employs various discipline models depending on the case and student   |             |              |            |            |
| <b>Standard 5 – Strategic Operations:</b> The principal is responsible for implementing systems that align with the school's vision and mission and improve the quality of instruction. | Distiguated | Accomplished | Proficient | Developing |
| Outlines clear goals, targets and strategies to line up with the Cato Governing Board directions  |             |              |            |            |
| Long term goal and planning for PD, student data, instructional growth of teachers  |             |              |            |            |

## Attachment 20: Résumé(s) and/or Qualifications for Proposed Financial Team

If some of the financial team members have been selected, but some have not, include résumés for those who have been selected and job descriptions or qualifications for the financial team members who have not yet been selected.

Supplemental human resources information forms are required for each position on the staffing chart (Attachment 23). If all applicable information related to a specific position's job description is included on those forms, include a note on this attachment that lists the relevant financial team position together with a reference to the appropriate page number in Attachment 23.

### ***BUSINESS OFFICE MANAGER/HR***

**General Job Description:** The Business Office Manager serves as a member of the Administrative Team of Cato Academy to provide leadership related to all financial and operational responsibilities. The Business Manager is entrusted with the financial records and operation of the front office. This includes the maintenance of confidential school records of scholars, personnel and finances in a manner consistent with administrative, ethical, legal and regulatory requirements of the educational system and the Texas Education Agency. Responsibilities include payroll, accounts receivable and accounts payable functions of the Business Office.

**Line of Authority/Reports to:** The Business Manager shall be directly responsible to the Superintendent to make sure that the school's budget and resources are used in the most efficient way.

**Works with:** Superintendent, Principal, Assistant Principal, Athletic Coaches, Faculty, Support Staff, Nurse, and Families of Cato Academy.

### **Areas of Responsibility:**

***To include, but not limited to:***

1. Keeping accounts and reporting on the school's financial position
2. Prepare financial information and reports
3. Work closely with the Principal preparing teacher contracts
4. Develop the annual budget in conjunction with the administration
5. Ensure adequate liability insurance
6. Contribute ideas and implement employee benefits – medical, dental, retirement, disability
7. Provide direction with budget preparation
8. Develop the annual budget
9. Oversee and manage revenue and expenditure targets
10. Monitor the annual operational budget
11. Monitor the school operations on a monthly basis
12. Prepare and provide a monthly financial statement to the Head of Schools
13. Responsible for payroll plans
14. Oversee and manage collection of tuition, fees, donations, etc.
15. Oversee and manage the school's financial records
16. Responsible for reviewing and approving all payables
17. Responsible for directing the cash management function



18. Sign payroll checks & payable checks
19. Prepare and provide appropriate reports of the school's financial condition for use by the
20. Principal, Cato Academy Governing Board, State and Federal Governments and third-party auditors in support of compliance requirements
21. Responsible for the maintenance of accurate office records, including personnel files, with full confidentiality as appropriate and required by law
22. Oversee the maintenance and management of accurate scholar records
23. Prepare and provide faculty and staff contracts as instructed by the Principal
24. Support and assists administrative efforts in attracting, developing and retaining high quality faculty and staff
25. Develop and maintain procedures for managing and monitoring the school system's financial resources
26. Provide direction, coordination and supervision of the Front Office
27. Oversee the Student Accountability Information Systems (SAIS) for the State of Texas (PEIMS)
28. Coordinate and manage Grants Management for the school
29. Assists with ordering all necessary supplies, textbooks, and resources
30. Assists with the competitive bid process and negotiation of vendor contracts
31. Make timely payments to suppliers and contractors
32. Facilitate the distribution of information needed for an orderly operation
33. Provide scholars an excellent, positive, encouraging role model

**Minimum Requirements** – The business manager should have a minimum of 5 years of office experience in a professional setting. Background in school administration is a plus, as is a college education. Proficiency in software systems which would be found in a school is a minimal requirement. All staff, including the office manager must pass background checks and finger print clearance.

### ***REGISTRAR JOB DESCRIPTION***

**Line of Authority/Reports to:** The Registrar shall be directly responsible to the Business Manager of Cato Academy and working closely with both the Principal to make sure that the school's planning and implementation of new scholar registration is handled with great care and professionalism, in order to assure that the enrollment process for all families is handled efficiently.

**Works with:** Superintendent, Principal, Assistant Principal, Business Manager, Faculty, Support Staff, Nurse, and Families and scholars of Cato.

**Job Goal:** To perform such actions as required to establish a true, accurate and permanent record of each scholar who attends Cato Academy, as well as providing the necessary clerical responsibilities required for the administration of the school in order to assure the smooth, efficient operation of the K8 school office.

**General Job Description:** The Registrar will be responsible for all scholar registration, enrollments and withdrawals entering and maintaining scholar data in school database system. Administer, navigate, implement and update scholar and school data demographics in school database system. This involves partnering with parents, handing out and explaining paperwork, contacting the home when necessary, inputting all information into the school database system as well as contacting other schools for information when necessary.

**Minimum Requirements** – The registrar should have a minimum of three years of office experience in a professional setting. Background in school administration in particular registrar is a plus, as is a college education. Proficiency in software systems which would be found in a school is a minimal requirement. All staff, including the office manager must pass background checks and finger print clearance. This candidate must have an understanding of Texas related reporting systems including PEIMS.

**Areas of Responsibility:**

- PEIMS submission according to Texas Education Agency PEIMS Data Standards and the coordination, collection formatting and integration of all pertinent data.
- Work cooperatively with campus, business office, and personnel office staff to collect, organize, and format data required to submit the charters PEIMS data according to prescribed state deadlines.
- Run edits, reports, and verification checks on data to ensure accuracy of information. Distribute edits and reports to appropriate staff for analysis, verification, and correction.
- Submit complete and accurate PEIMS data in Texas Education Agency (TEA)-prescribed format for processing using computer terminal or personal computer.
- Compile and submits TEA required PET data weekly, as well as reviewing and researching PET reports. Responsible for the submission of fall, mid-year, summer and extended year programs reports to the state.
- Responsible for assigning Texas State Service ID's for all state approved courses as described in the PEIMS Data Standards.
- Verify data submitted to TEA and submit corrections in a timely manner.
- Provides guidance to campuses regarding TEA required reports such as the Campus Summary Report, Attendance Verification Report, Enrollment Verification Report and Student Detailed Report
- Creates and disseminates information on behalf of the PEIMS Department
- Participates in the evaluation of SIS (Student Information Systems) PEIMS Modules for accuracy and comprehensiveness Training and Technical Support
- Provide training and support to campuses and to business and personnel office staff responsible for processing PEIMS data.
- Receive PEIMS-related information from ESC and TEA, attend all regional PEIMS workshops, and disseminate information to other staff in a timely manner, including updates to PEIMS Data Standards.



## **Attachment 21: Résumé(s) and/or Qualifications for Proposed Operations Team**

If some of the operations team members have been selected, but some have not, include résumés for those who have been selected and job descriptions or qualifications for the operations team members who have not yet been selected.

Supplemental human resources information forms are required for each position on the staffing chart (Attachment 23). If all applicable information related to a specific position's job description is included on those forms, include a note on this attachment that lists the relevant operations team position together with a reference to the appropriate page number in Attachment 23.

**The operation team and the financial team are overlapping in our proposed model.**

**The school is proposing that the Business Manager will manage the day to day back office services with the aid of outside vendors. These vendors include:**

1. Accounting support service including monthly reconciliation of the checking accounts, preparation of the P&L and Balance Sheet and oversight of the Business Managers accounts payables and receivables.
2. Annual Auditing of all financial records
3. Human Resources outsourcing using a PPO.
4. Marketing and advertising outsourcing
5. Learning Management System (LMS) for grading, lesson plan delivery and curriculum resources.
6. iEP Pro for managing the data surrounding Special Education services.

## Attachment 22: Staffing Chart

Using the template provided in the table below, complete the staffing chart for the proposed campus(es). The staffing chart **must** include staffing projections for each year during the initial contract period (Years 1-5) and at capacity.

The staffing chart should align with the organizational charts submitted in Attachment 13 and the Supplemental Human Resources Information Forms submitted in Attachment 23.

The staffing chart should include, but is not limited to, the following positions:

- Superintendent/CEO
- Central office staff, including the chief financial officer and the chief operating officer
- School leaders, including principal(s), assistant principal(s), and other leaders at the campus level
- Teachers (separate rows for each grade level or core subject)
- Teachers (separate row for each special)
- Teachers, ESL/Bilingual
- Teachers, Special Education
- Student support staff (e.g., paraprofessionals, counselors, social workers, etc.)
- Campus operations staff (e.g., clerks, PEIMS coordinator, etc.)

On the staffing chart, all of the categories listed above should be included. Position titles can be modified or added as needed. Every position for which a Supplemental Human Resources Information Form was submitted in Attachment 23 should be listed as a separate row on the staffing chart.

Fill in the total number of full-time equivalent (FTE) staff required for each position in each year. For part-time employees, enter the appropriate percentage of FTE (e.g., an employee who works half days would be 0.5 FTE). Complete only the grade level(s) (elementary, middle, high) that apply to the proposed charter school.

Finally, provide teacher-student ratios in the final row of the table.

| Positions               | Staffing Chart |        |        |        |        |             |
|-------------------------|----------------|--------|--------|--------|--------|-------------|
|                         | Year 1         | Year 2 | Year 3 | Year 4 | Year 5 | At capacity |
| Central Office          |                |        |        |        |        |             |
| Superintendent/CEO      | 1              | 1      | 1      | 1      | 1      | 1           |
| Chief Financial Officer |                |        |        |        |        |             |
| Chief Operating Officer |                |        |        |        |        |             |
| Other Central Office    |                |        |        |        |        |             |



| Positions  | Staffing Chart |             |             |             |             |             |
|--|----------------|-------------|-------------|-------------|-------------|-------------|
|  | Year 1         | Year 2      | Year 3      | Year 4      | Year 5      | At capacity |
| staff  |                |             |             |             |             |             |
| <b>Total central office FTEs</b>                                       | 1              | 1           | 1           | 1           | 1           | 1           |
| <b>Elementary School Campus Staff</b>                                  |                |             |             |             |             |             |
| School leaders<br>(principal, assistant principal, PD/Data Dir, etc.)  | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers Kinder  | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 1 <sup>st</sup> Grade   | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 2 <sup>nd</sup> Grade   | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 3 <sup>rd</sup> Grade   | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 4 <sup>th</sup> Grade   | 2              | 2           | 3           | 3           | 3           | 3           |
| Teachers 5 <sup>th</sup> Grade   | 2              | 2           | 3           | 3           | 3           | 3           |
| Teachers (specials, e.g., art)   | 1              | 2           | 3           | 3           | 3           | 3           |
| Teachers, ESL/Bilingual  | .5             | 1           | 1           | 1           | 1           | 1           |
| Teachers, Special Education  | 1              | 1           | 2           | 2           | 2           | 2           |
| Student support staff<br>(e.g., paraprofessionals, counselors)         | 2              | 2           | 4           | 4           | 4           | 4           |
| Campus operations<br>(e.g., PEIMS, Custodians, Lunch, Nurse, Bus Mngr) | 6.5            | 6.5         | 8.5         | 8.5         | 8.5         | 8.5         |
| <b>Total elementary FTEs</b>   | <b>25</b>      | <b>31.5</b> | <b>42.5</b> | <b>42.5</b> | <b>42.5</b> | <b>42.5</b> |
| <b>Middle School Campus Staff</b>                                      |                |             |             |             |             |             |
| School leaders<br>(principal, assistant principal, deans, etc.)        |                |             |             |             |             |             |
| Teachers 6 <sup>th</sup> Grade   | 1              | 2           | 3           | 3           | 3           | 3           |
| Teachers 7 <sup>th</sup> Grade   |                | 2           | 3           | 3           | 3           | 3           |
| Teachers 8 <sup>th</sup> Grade   |                |             | 3           | 3           | 3           | 3           |
| Teacher (specials, e.g., art) In Elem                                  |                |             |             |             |             |             |
| Teacher, ESL/Bilingual In  |                |             |             |             |             |             |

| Positions   | Staffing Chart |        |        |        |        |             |
|---|----------------|--------|--------|--------|--------|-------------|
|   | Year 1         | Year 2 | Year 3 | Year 4 | Year 5 | At capacity |
| Elem  |                |        |        |        |        |             |
| Teacher, Special Education – In Elem                                |                |        |        |        |        |             |
| Student support staff In Elem                                       |                |        |        |        |        |             |
| Campus operations In Elem   |                |        |        |        |        |             |
| <b>Total middle school FTEs</b>                                     | 1              | 4      | 9      | 9      | 9      | 9           |
| <b>High School Campus Staff</b>                                     |                |        |        |        |        |             |
| School leaders (principal, assistant principal, deans, etc.)        |                |        |        |        |        |             |
| Teachers (separate line for each grade or core subject)             |                |        |        |        |        |             |
| Teacher (specials, e.g., art)                                       |                |        |        |        |        |             |
| Teacher, ESL/Bilingual  |                |        |        |        |        |             |
| Teacher, Special Education  |                |        |        |        |        |             |
| Student support staff (e.g., paraprofessionals, counselors)         |                |        |        |        |        |             |
| Campus operations (e.g., PEIMS, Custodians, Lunch, Nurse, Bus Mngr) | 6.5            | 6.5    | 8.5    | 8.5    | 8.5    | 8.5         |
| <b>Total high school FTEs</b>                                       | NA             | NA     | NA     | NA     | NA     | NA          |
| <b>Total charter school staff</b>                                   | 27             | 36.5   | 52.5   | 52.5   | 52.5   | 52.5        |
| <b>Teacher-student ratio</b>  | 17             | 18     | 17     | 18     | 18     | 18          |



## Attachment 22: Staffing Chart

Using the template provided in the table below, complete the staffing chart for the proposed campus(es). The staffing chart **must** include staffing projections for each year during the initial contract period (Years 1-5) and at capacity.

The staffing chart should align with the organizational charts submitted in Attachment 13 and the Supplemental Human Resources Information Forms submitted in Attachment 23.

The staffing chart should include, but is not limited to, the following positions:

- Superintendent/CEO
- Central office staff, including the chief financial officer and the chief operating officer
- School leaders, including principal(s), assistant principal(s), and other leaders at the campus level
- Teachers (separate rows for each grade level or core subject)
- Teachers (separate row for each special)
- Teachers, ESL/Bilingual
- Teachers, Special Education
- Student support staff (e.g., paraprofessionals, counselors, social workers, etc.)
- Campus operations staff (e.g., clerks, PEIMS coordinator, etc.)

On the staffing chart, all of the categories listed above should be included. Position titles can be modified or added as needed. Every position for which a Supplemental Human Resources Information Form was submitted in Attachment 23 should be listed as a separate row on the staffing chart.

Fill in the total number of full-time equivalent (FTE) staff required for each position in each year. For part-time employees, enter the appropriate percentage of FTE (e.g., an employee who works half days would be 0.5 FTE). Complete only the grade level(s) (elementary, middle, high) that apply to the proposed charter school.

Finally, provide teacher-student ratios in the final row of the table.

| Positions               | Staffing Chart |        |        |        |        |             |
|-------------------------|----------------|--------|--------|--------|--------|-------------|
|                         | Year 1         | Year 2 | Year 3 | Year 4 | Year 5 | At capacity |
| <b>Central Office</b>   |                |        |        |        |        |             |
| Superintendent/CEO      | 1              | 1      | 1      | 1      | 1      | 1           |
| Chief Financial Officer |                |        |        |        |        |             |
| Chief Operating Officer |                |        |        |        |        |             |
| Other Central Office    |                |        |        |        |        |             |

| Positions  | Staffing Chart |             |             |             |             |             |
|--|----------------|-------------|-------------|-------------|-------------|-------------|
|  | Year 1         | Year 2      | Year 3      | Year 4      | Year 5      | At capacity |
| staff  |                |             |             |             |             |             |
| <b>Total central office FTEs</b>                                       | 1              | 1           | 1           | 1           | 1           | 1           |
| <b>Elementary School Campus Staff</b>                                  |                |             |             |             |             |             |
| School leaders<br>(principal, assistant principal, PD/Data Dir, etc.)  | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers Kinder  | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 1 <sup>st</sup> Grade   | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 2 <sup>nd</sup> Grade   | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 3 <sup>rd</sup> Grade   | 2              | 3           | 3           | 3           | 3           | 3           |
| Teachers 4 <sup>th</sup> Grade   | 2              | 2           | 3           | 3           | 3           | 3           |
| Teachers 5 <sup>th</sup> Grade   | 2              | 2           | 3           | 3           | 3           | 3           |
| Teachers (specials, e.g., art)   | 1              | 2           | 3           | 3           | 3           | 3           |
| Teachers, ESL/Bilingual  | .5             | 1           | 1           | 1           | 1           | 1           |
| Teachers, Special Education  | 1              | 1           | 2           | 2           | 2           | 2           |
| Student support staff<br>(e.g., paraprofessionals, counselors)         | 2              | 2           | 4           | 4           | 4           | 4           |
| Campus operations<br>(e.g., PEIMS, Custodians, Lunch, Nurse, Bus Mngr) | 6.5            | 6.5         | 8.5         | 8.5         | 8.5         | 8.5         |
| <b>Total elementary FTEs</b>   | <b>25</b>      | <b>31.5</b> | <b>42.5</b> | <b>42.5</b> | <b>42.5</b> | <b>42.5</b> |
| <b>Middle School Campus Staff</b>                                      |                |             |             |             |             |             |
| School leaders<br>(principal, assistant principal, deans, etc.)        |                |             |             |             |             |             |
| Teachers 6 <sup>th</sup> Grade   | 1              | 2           | 3           | 3           | 3           | 3           |
| Teachers 7 <sup>th</sup> Grade   |                | 2           | 3           | 3           | 3           | 3           |
| Teachers 8 <sup>th</sup> Grade   |                |             | 3           | 3           | 3           | 3           |
| Teacher (specials, e.g., art) In Elem                                  |                |             |             |             |             |             |
| Teacher, ESL/Bilingual In  |                |             |             |             |             |             |



| Positions   | Staffing Chart |        |        |        |        |             |
|---|----------------|--------|--------|--------|--------|-------------|
|   | Year 1         | Year 2 | Year 3 | Year 4 | Year 5 | At capacity |
| Elem  |                |        |        |        |        |             |
| Teacher, Special Education – In Elem                                |                |        |        |        |        |             |
| Student support staff In Elem                                       |                |        |        |        |        |             |
| Campus operations In Elem   |                |        |        |        |        |             |
| <b>Total middle school FTEs</b>                                     | 1              | 4      | 9      | 9      | 9      | 9           |
| <b>High School Campus Staff</b>                                     |                |        |        |        |        |             |
| School leaders (principal, assistant principal, deans, etc.)        |                |        |        |        |        |             |
| Teachers (separate line for each grade or core subject)             |                |        |        |        |        |             |
| Teacher (specials, e.g., art)                                       |                |        |        |        |        |             |
| Teacher, ESL/Bilingual  |                |        |        |        |        |             |
| Teacher, Special Education  |                |        |        |        |        |             |
| Student support staff (e.g., paraprofessionals, counselors)         |                |        |        |        |        |             |
| Campus operations (e.g., PEIMS, Custodians, Lunch, Nurse, Bus Mngr) | 6.5            | 6.5    | 8.5    | 8.5    | 8.5    | 8.5         |
| <b>Total high school FTEs</b>                                       | NA             | NA     | NA     | NA     | NA     | NA          |
| <b>Total charter school staff</b>                                   | 27             | 36.5   | 52.5   | 52.5   | 52.5   | 52.5        |
| <b>Teacher-student ratio</b>  |                |        |        |        |        |             |

## **Attachment 23: Supplemental Human Resources Information Forms**

Using the template provided on the [Subchapter D](#) application page, complete a Supplemental Human Resources Information Form for ALL paid positions required to operate the proposed school in year one and at capacity. Supplemental Human Resources Information Forms should be submitted for each position listed on the staffing chart (Attachment 22).

Ensure that the submission includes ALL positions necessary to operate the proposed school during the start-up year, the first year of operations, and at capacity.

All positions represented in this Attachment should also be represented on the organizational chart submitted in Attachment 13 and on the staffing chart submitted in Attachment 22.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Superintendent

Reports to: Governing Board

Salary Range: 0-\$75,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

None

Proposed Location (City and County): Pearland, Brazoria County

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Masters Degree (minimum) - from an accredited college or university.

Experience Required: 5 Years Minimum in leading a public school or charter school.

Certification Required: None

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN     | Located in (City) | # of Students Served | Salary Range          |
|------------------|---------|-------------------|----------------------|-----------------------|
| Houston ISD      | 1019012 | Houston           | 209,772              | \$75,800 to \$100,174 |
| Pearland ISD     | 020908  | Houston           | 21,606               | \$75,624 to \$105,513 |
| Fort Bend ISD    | 75769   | Houston           | 75,769               | \$78,324 to \$112,709 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Superintendent

Reports to: Governing Board

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Carry out policies as directed by the Governing Board
2. Acts as primary education, finance and operations professional for the charter school.
3. Responsible to develop the school, supervise the site Principal and manage operations of school programs and the facilities.
4. Organize report and attend all Governing Board meetings. Serve as counsel to the board.
5. Make all administrative decisions necessary for the proper function of the school.
6. Keeps the Board aware of statewide and national educational developments and changes.
7. Develops rules and procedures necessary to implement the Board's policies.
8. Administers the budget assuring that the expenditures of schools funds are within the legal requirements of the budget.
9. Provides leadership to the Board and staff in the continuous development, implementation, and evaluation of the instructional program.
10. Informs and interprets school programs and activities to the community.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Principal

Reports to: Superintendent

Salary Range: \$98,000 to \$110,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

Cell phone allowance, performance bonus up to 10% of their annual wage for Board approved incentive plan.

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Masters Degree (minimum) - from an accredited college or university

Experience Required: 2 years as a classroom teacher - 5 years of administration

Certification Required: State of Texas, Principal Certification.

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN     | Located in (City) | # of Students Served | Salary Range          |
|------------------|---------|-------------------|----------------------|-----------------------|
| Houston          | 1019012 | Houston           | 209,772              | \$75,800 to \$100,174 |
| Pearland ISD     | 020908  | Houston           | 21,606               | \$75,624 to \$105,513 |
| Fort Bend        | 079907  | Houston           | 75,769               | \$78,324 to \$112,709 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Principal

Reports to: Superintendent

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Provide leadership, guidance and encouragement to faculty and staff. Provide written evaluations on all teaching and instructional personnel with the school. Orient and assist new hires
2. Provide direction, coordination and supervision to ensure the academic staff develop and align the curriculum maps, with their sequence of essential learning outcomes, assessments, resources, purchased instructional materials, to TEKS standards.
3. Provide leadership including direction and supervision with the articulation and annual revision of the curriculum document and the selection and use of instructional materials and equipment
4. Provide direction, coordination and supervision to collect, organize and analyze data related to the school educational program in order to assess student learning and development
5. Provide direction, coordination and supervision to ensure curriculum mapping/scope and sequence documents that connect to the essential learning outcomes through instructional planning for each subject area at each grade level is implemented. Provides oversight of mandated State testing
6. Ensure all necessary supplies, textbooks, and resources are ordered
7. Ensure a safe and orderly environment. Plan and conduct faculty and staff meetings
8. Promote the proper conduct, behavior and discipline conducive to having an excellent learning environment. Discipline scholars as necessary in the form of being fair and consistent
9. Facilitate the clarification and resolution of conflicts between parents and teachers. Develop positive relationships and make appropriate use of parent volunteers.
10. Provide scholars an excellent, positive, encouraging role model



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Vice Principal

Reports to: Principal

Salary Range: \$57,000 to \$69,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Masters Degree (minimum) - from an accredited college or university

Experience Required: 5 plus years in teaching and or administration

Certification Required: Either have or working towards the State of Texas Principal Certificate.

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students |                      |
|------------------|--------|-------------------|---------------|----------------------|
|                  |        |                   | Served        | Salary Range         |
| Alvin ISD        | 020901 | Alvin             | 25,945        | \$61,500 to \$80,000 |
| Pearland ISD     | 020908 | Pearland          | 21,606        | \$67,908 to \$80,000 |
| Houston ISD      | 101912 | Houston           | 209,772       | \$64,610 to \$70,000 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Vice Principal

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Assists with supervision of personnel; Provide leadership, guidance and encouragement to faculty and staff;
2. Supervise those personnel assigned by the Principal; Provide written evaluations on personnel as assigned by the Principal
3. Assist in creating job descriptions and evaluation instruments; Conduct meetings using planned and written agendas
4. Ensure curriculum mapping/scope and sequence documents that connect to the essential learning outcomes through instructional planning for each subject area at each grade level is implemented
5. Assists with providing instructional leadership for outcomes, providing faculty and staff leadership and collaboration with curriculum, instruction and assessments
6. Assist with formal and informal evaluations of the teaching faculty
7. Assist with developing a comprehensive and well planned professional development program to increase school academic output; Provide input toward preparation of annual budget
8. Develop and implement class and teacher schedules; Develop and monitor duty schedules
9. Help facilitate the clarification and resolution of conflicts between parents and teachers; Encourage the use of community resources
10. Assist with preparation of scholar activities and events within the school; Assist new scholars with orientation to school; Discipline scholars as necessary in the form of being fair and consistent;



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Director of Instruction

Reports to: Principal

Salary Range: 57,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Masters Degree (minimum) - from an accredited college or university

Experience Required: Five years of teaching

Certification Required: Certified Teacher in the State of Texas

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN     | Located in (City) | # of Students Served | Salary Range         |
|------------------|---------|-------------------|----------------------|----------------------|
| Houston ISD      | 1019012 | Houston           | 209,772              | \$58,000 to \$75,000 |
| Alief ISD        | 101903  | Houston           | 47,768               | \$66,000 to \$71,000 |
| Fort Bend ISD    | 079907  | Houston           | 75,769               | \$72,500 to \$82,000 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Director of Instruction

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. At least five years of successful teaching experience Classical background a plus.
2. Proven leadership ability promoting collaborative decision making; Strong verbal, written, and interpersonal communication skills to positively impact community, parents, scholars, administrators, faculty, and staff
3. Strong commitment to supporting and safeguarding the principles of excellence in education
4. Working knowledge of learning theory, instructional methodology, curriculum development, teacher observation/evaluation
5. Ability to manage conflict resolution with an attitude of humility and service
6. Working knowledge and understanding of Texas TEKS academic standards
7. Working knowledge and understanding of computers and computer software applications such as word processing, spreadsheets and other applications tailored to specific departmental needs
8. Working knowledge of learning management system
9. Assist Principal with oversight of State mandated testing
- 10.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Business Manager

Reports to: School Principal

Salary Range: 54,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Bachelor's Degree (minimum) - from an accredited college or university

Experience Required: One Year

Certification Required: Not required

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students Served | Salary Range      |
|------------------|--------|-------------------|----------------------|-------------------|
| Houston ISD      | 101912 | Houston           | 209,772              | \$56,000-\$70,000 |
| Alief ISD        | 101903 | Houston           | 47,768               | \$60,000-\$70,000 |
| Fort Bend ISD    | 079907 | Houston           | 75,769               | \$62,000-\$81,000 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Business Manager

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Keeping accounts and reporting on the school's financial position, prepare financial information for the Governing Board and Admin
2. Develop annual budget - prepare for annual audit.
3. Work closely with the Principal in preparing teacher contracts, HR benefits and policies and general payroll duties.
4. Responsible for reviewing and approving all payables and receivables
5. Oversee all billing for services rendered by the school (after school, sports, other)
6. Responsible for the maintenance of accurate office records, including personnel files, with full confidentiality as appropriate and required by law
7. Provide direction, coordination and supervision of the Front Office
8. Oversee the Student Accountability Information Systems (PEIMS), iEP-Pro (Special Ed) and other systems.
9. Assists with ordering all necessary supplies, textbooks, and resources
10. Assists with the competitive bid process and negotiation of vendor contracts



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Teacher

Reports to: Principal

Salary Range: \$35,000 to \$47,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Bachelor's Degree (preferred but not required) - from an accredited college or university

Experience Required: Three plus with experience in PEIMS

Certification Required: Not required but preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students Served | Salary Range         |
|------------------|--------|-------------------|----------------------|----------------------|
| Houston ISD      | 101901 | Houston           | 209,772              | \$40,000 to \$50,000 |
| Alief ISD        | 101903 | Houston           | 47,768               | \$42,000 to \$52,000 |
| Fort Bend ISD    | 079907 | Houston           | 75,769               | \$40,000 to \$53,000 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Registrar

Reports to: Business Manager

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. The Registrar will be responsible for all scholar registration, enrollments and withdrawals entering and maintaining scholar data in school database system.
2. Administer, navigate, implement and update scholar and school data demographics in school database system.
3. Responsible for PEIMS coordination of collecting, processing, and transmitting student, staff, and financial data through the Public Education Information Management System (PEIMS)
4. Training of campus staff on PEIMS data contacts, and to provide support in other district data collection and reporting activities
5. Must be capable of partnering with parents, handing out and explaining paperwork, contacting the home when necessary, inputting all information into the school database system as well as contacting other schools for information when necessary
6. In-depth knowledge of TEA Data Standards, TEA Attendance Accounting Handbook, PID maintenance and ET submission
7. Ability to collect, organize, and maintain accurate and auditable records
8. Excellent time management skills enabling complete regulatory compliance.
- 9.
- 10.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Teacher

Reports to: Principal

Salary Range: \$52,000 to \$59,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Bachelor's Degree (minimum) - from an accredited college or university

Experience Required: One Year

Certification Required: Not required but preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students Served | Salary Range         |
|------------------|--------|-------------------|----------------------|----------------------|
| Alvin ISD        | 020901 | Alvin             | 25,945               | \$56,075 to \$71,125 |
| Pearland ISD     | 020908 | Pearland          | 21,606               | \$56,000 to \$72,000 |
| Houston ISD      | 101912 | Houston           | 209,772              | \$54,369 to \$70,200 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Teacher

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Teachers are responsible for instructing students using the Classical model of learning combined with data driven decision making.

2. Teachers will create daily lesson plans that are in alignment with the schools academic goals.

3. Teachers will engage in regular communications with their scholars parents as prescribed through the school administrations communication plan.

4. Adhear to the schools policies, administrative tasks and duties.

5. Manage their individual classroom within the frameworks set forth by the school administration.

6. Understand and address individual learners from EL to IEP and generally working with all scholars to attain academic growth at or above grade level.

7. Maintain a professional appearance and conduct themselves professionally at all times.

8.

9.

10.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: EL Teacher

Reports to: Principal

Salary Range: 62,400

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

## Minimum Qualifications Required:

Education Required: Bachelor's Degree (minimum) - from an accredited college or university

Experience Required: Two Year

Certification Required: State of Texas EL Certification

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at [http://mansfield.tea.state.tx.us/TEA\\_AskTED\\_Web/Forms/Home.aspx](http://mansfield.tea.state.tx.us/TEA_AskTED_Web/Forms/Home.aspx). Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students Served | Salary Range      |
|------------------|--------|-------------------|----------------------|-------------------|
| Alief ISD        | 101903 | Houston           | 75,769               | \$48000 - \$57000 |
| Fort Bend ISD    | 079907 | Houston           | 47,468               | \$49000- \$52000  |
| Houston ISD      | 101912 | Houston           | 209,772              | \$44000-\$52000   |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: EL Teacher

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Understand and manage the EL Program at Cato Academy
2. LPAC committee scheduling and participation as well as reporting to stakeholders
3. Teachers are responsible for instructing students using the Classical model of learning combined with data driven decision making.
4. Teachers will create daily lesson plans that are in alignment with the schools academic goals.
5. Teachers will engage in regular communications with their scholars parents as prescribed through the school administrations communication plan.
6. Teachers will participate in provided Professional Development programs and continue their professional growth and ongoing education.
7. Adhere to the schools policies, administrative tasks and duties.
8. Manage their individual classroom within the frameworks set forth by the school administration.
9. Understand and address individual learners from EL to IEP and generally working with all scholars to attain academic growth at or above grade level.
10. Maintain a professional appearance and conduct themselves professionally at all times.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Special Education Teacher

Reports to: Principal

Salary Range: 69,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Bachelor's Degree (minimum) - from an accredited college or university

Experience Required: Two Year plus

Certification Required: Certified Special Education Instructor in the State of Texas

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at [http://mansfield.tea.state.tx.us/TEA\\_AskTED\\_Web/Forms/Home.aspx](http://mansfield.tea.state.tx.us/TEA_AskTED_Web/Forms/Home.aspx). Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students Served | Salary Range         |
|------------------|--------|-------------------|----------------------|----------------------|
| Houston ISD      | 101912 | Houston           | 209,772              | \$52,800 to \$84,000 |
| Alief ISD        | 101903 | Houston           | 47,768               | \$53,500 to \$71,000 |
| Fort Bend ISD    | 079907 | Houston           | 75,769               | \$64,500 to \$66,000 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Special Education Teacher

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Employ special educational strategies and techniques during instruction to improve the development of sensory- and perceptual-motor skills, language, cognition, and memory
2. Modify the general education curriculum for students with disabilities based upon a variety of instructional techniques and technologies
3. Meet with parents to discuss their children's progress and to determine priorities for their children and their individualized educational needs. Confer with parents, administrators, testing specialists, social workers, and other professionals to develop individualized education programs (IEPs) designed to promote students' educational, physical, and social/emotional development
4. Serve as a member of a multidisciplinary team as appropriate. Assist in preparation of data for local, state, and federal reports
5. Instruct students in academic subjects using a variety of techniques such as phonetics, multi-sensory learning, and repetition to reinforce learning and to meet students' varying needs and interests
6. Teachers are responsible for instructing students using the Classical model of learning combined with data driven decision making.
7. Teachers will participate in provided Professional Development programs and continue their professional growth and ongoing education.
8. Teachers are responsible for instructing students using the Classical model of learning combined with data driven decision making.
9. Teachers will engage in regular communications with their scholars parents as prescribed through the school administrations communication plan.
10. Maintain a professional appearance and conduct themselves professionally at all times.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Teacher (Intervention)

Reports to: Principal

Salary Range: \$52,000 to \$59,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Bachelor's Degree (minimum) - from an accredited college or university

Experience Required: Five plus years of teaching

Certification Required: Not required but preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at [http://mansfield.tea.state.tx.us/TEA\\_AskTED.Web/Forms/Home.aspx](http://mansfield.tea.state.tx.us/TEA_AskTED.Web/Forms/Home.aspx). Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students Served | Salary Range         |
|------------------|--------|-------------------|----------------------|----------------------|
| Alvin ISD        | 020901 | Alvin             | 25,945               | \$56,075 to \$71,125 |
| Pearland ISD     | 020908 | Pearland          | 21,606               | \$56,000 to \$72,000 |
| Houston ISD      | 101912 | Houston           | 209,772              | \$54,369 to \$70,200 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Teacher

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Teachers are responsible for instructing students using the Classical model of learning combined with data driven decision making.
2. Teachers will create daily lesson plans that are in alignment with the schools academic goals.
3. Teachers will engage in regular communications with their scholars parents as prescribed through the school administrations communication plan.
4. Adhear to the schools policies, administrative tasks and duties.
5. Manage their individual classroom within the frameworks set forth by the school administration.
6. Understand and address individual learners from EL to IEP and generally working with all scholars to attain academic growth at or above grade level.
7. Maintain a professional appearance and conduct themselves professionally at all times.
- 8.
- 9.
- 10.



# GENERATION 25 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Teacher Assistant

Reports to: Principal

Salary Range: \$20,000 to \$30,000

List any other potential form of remuneration (i.e., car allowance, cell phone, memberships, travel or housing allowance, etc...) to be given to the individual in this position. If none, please state N/A.

NA

Proposed Location (City and County): Pearland Alvin (Brazoria County)

Number of Students anticipated in year one: 306 In year five: 696

Minimum Qualifications Required:

Education Required: Bachelor's Degree (minimum) - from an accredited college or university

Experience Required: One Year

Certification Required: Not required but preferred

Complete the following using information gathered from three different traditional districts comparable in size, student make-up, and location. A traditional district is identified by the abbreviation ISD or CISD. County district numbers may be accessed on line through the Texas Education Directory found at <http://mansfield.tea.state.tx.us/TEA.AskTED.Web/Forms/Home.aspx>. Additionally, traditional districts **will not** have an eight as the fourth digit in the county district number (CDN).

| Name of District | CDN    | Located in (City) | # of Students Served | Salary Range         |
|------------------|--------|-------------------|----------------------|----------------------|
| Alvin ISD        | 020901 | Alvin             | 25,945               | \$12.50 hourly       |
| Pearland ISD     | 020908 | Pearland          | 21,606               | \$16,700 to \$24,455 |
| Houston ISD      | 101912 | Houston           | 209,772              | \$16,500 to \$23,000 |

Name of Proposed Charter School: Cato Classical Academy

Name of Sponsoring Entity: Classical Charter Schools of Texas, Inc.

Position Title: Teacher (Assistant)

Reports to: Principal

## RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Assist the classroom teacher in general duties

2. Work one on one with scholars needing additional supports

3. Assist in an orderly management of the classroom activities

4. Support the teachers in preparing for the upcoming lessons

5. Fill in and support with outside the classroom activities

6.

7.

8.

9.

10.



## Attachment 24: Teacher Evaluation Tool(s)

Provide any teacher evaluation tool(s) that have been developed.

Loti Framework (Based on the Danielson Rubric). The following forms include: The teacher self evaluation from, the academic coach form (PD/Data/Curriculum Director and or site Admin), the Rubric for LoTi observations and a sample generic teacher report which is generated after multiple observations. This system has been developed using the Danielson Rubric, LoTi's framework and customization to the Cato Academy academic model (Classical and Charlotte Mason).

**NAME:**

**SCHOOL:**

**EVALUATOR:**

**DATE/TIME:**

**TENURE STATUS:**

- ☐ Tenured  
☐ Non-Tenured

**PRE-OBSERVATION CONFERENCE NOTES:**

**DATE OF POST-OBSERVATION CONFERENCE:**

**CO-OBSERVATION:**

**Is this a Co-Observation?**

- ☐ Yes; This is a Co-Observation and I am the primary observer  
☐ Yes; This is a Co-Observation and I am the secondary observer  
☐ No; This is not a Co-Observation

**Report Co-Observation?**

- ☐ Yes; Formally report observation data  
☐ No; This is an observation for training purposes only

**Name of Co-Observation Partner:**

**TYPE OF OBSERVATION:**

**Announced or Unannounced?**

- ☐ This is an Announced Observation  
☐ This is an Unannounced Observation

**Long or Short?**

- ☐ This is a Long Observation  
☐ This is a Short Observation

**LESSON OBJECTIVE:**

**Note the Objective of the Lesson:**

| DOMAIN 1: PLANNING & PREPARATION  |   |   |  |
|---|---|---|--|
| Failing (1)   | Needs Improvement (2)   | Proficient (3)  | Distinguished (4)  |
| <b>1-A: Demonstrating Knowledge of Content &amp; Pedagogy</b>   |   |   |  |
| Teacher makes no attempt to connect new content with scholar knowledge base or theme-based enduring understandings within the wider classical knowledge base            | Teacher makes limited attempts to connect new content with scholar knowledge base and/or theme-based enduring understandings within the wider classical knowledge base                  | Teacher connects new content with scholar knowledge base and/or theme-based enduring understandings within the wider classical knowledge base   | Teacher connects new content with scholar knowledge base, anticipates misconceptions, and makes interdisciplinary connections within the wider classical knowledge base  |
| <b>1-B: Demonstrating Knowledge of Scholars</b>   |   |   |  |
| Teacher does not use formative assessments or differentiation strategies to guide scholar discovery   | Teacher guides scholar discovery with limited formative assessments or differentiation strategies, but they do not reflect an understanding of the readiness or interests of scholars   | Teacher guides scholar discovery with formative assessments and/or differentiation strategies that reflect a general understanding of the readiness and/or interests of most scholars         | Teacher guides scholar discovery with formative assessments and differentiation strategies that reflect a comprehensive understanding of the readiness and interests of all scholars                               |
| <b>1-C: Setting Instructional Outcomes</b>  |   |   |  |
| Teacher does not provide learning objectives, thematic resources, or activities that reflect scholar readiness  | Teacher provides limited learning objectives, thematic resources, or activities that reflect the readiness of some scholars   | Teacher provides learning objectives, thematic resources, and/or activities/outcomes paced to reflect the readiness of most scholars  | Teacher provides clear learning objectives, age-appropriate thematic resources, and rigorous activities/outcomes paced to reflect the readiness of all scholars  |
| <b>1-D: Demonstrating Knowledge of Resources</b>  |   |   |  |
| Teacher does not provide resources that support the theme or cultivate <i>Habits of the Heart and Mind</i>  | Teacher provides limited resources from the wider classical knowledge base that support the theme, promote critical thinking, or cultivate <i>Habits of the Heart and Mind</i>          | Teacher provides resources from multiple sources within the wider classical knowledge base that support the theme, promote critical thinking, and/or <i>Habits of the Heart and Mind</i>      | Teacher provides extensive resources from multiple sources within the wider classical knowledge base that support the theme, promote critical thinking, and cultivate <i>Habits of the Heart and Mind</i>          |
| <b>1-E: Designing Coherent Instruction</b>  |   |   |  |
| Teacher does not design learning activities/outcomes for scholars to make connections with themes, timelines, or enduring understandings of a Classical Education model | Teacher designs learning activities/outcomes that support some scholars in making limited connections with themes, timelines, or enduring understandings of a Classical Education model | Teacher designs learning activities/outcomes that engage most scholars in making purposeful connections with themes, timelines, and/or enduring understandings of a Classical Education model | Teacher designs differentiated learning activities/outcomes that engage all scholars in making their own purposeful connections with themes, timelines, and enduring understandings of a Classical Education model |
| <b>1-F: Designing Scholar Assessments</b>   |   |   |  |
| Teacher does not design assessments that guide new learning or provide feedback for scholars  | Teacher designs assessments that guide the pace of new learning and/or provide limited feedback for scholars  | Teacher designs assessments that target scholars' developmental/learning style needs, guide the pace of new learning, and/or provide feedback for scholars to assess their own goals          | Teacher designs authentic assessments that target scholars' developmental/learning style needs, guide the pace of new learning, and provide feedback for scholars to assess their own goals and outcomes           |



| DOMAIN 2: CLASSROOM ENVIRONMENT   |   |   |  |
|---|---|---|--|
| Failing (1)   | Needs Improvement (2)   | Proficient (3)  | Distinguished (4)  |
| <b>2-A: Creating an Environment of Respect &amp; Rapport</b>  |   |   |  |
| Teacher does not model <i>Leman Academy Scholar Character Traits</i> ; students are disrespectful or negative   | Teacher models some <i>Leman Academy Scholar Character Traits</i> through active listening, positive encouragement or democratic collaboration; most scholars reflect character traits with teacher                     | Teacher models <i>Leman Academy Scholar Character Traits</i> through active listening, positive encouragement, and/or democratic collaboration; scholars reflect character traits with teacher and among most peers | Teacher models <i>Leman Academy Scholar Character Traits</i> through active listening, positive encouragement, and democratic collaboration; scholars are excited to reflect character traits with teacher and among all peers |
| <b>2-B: Establishing a Culture for Learning</b>   |   |   |  |
| Teacher does not maintain expectations for scholars to exhibit the <i>Habits of Attention, Best Effort, Responsibility, or Respect</i>                          | Teacher maintains limited expectations for scholars to exhibit the <i>Habits of Attention, Best Effort, Responsibility, and/or Respect</i>  | Teacher maintains high expectations for scholars to exhibit the <i>Habits of Attention, Best Effort, Responsibility, and/or Respect</i>   | Teacher promotes extremely high expectations for scholars to exhibit the <i>Habits of Attention, Best Effort, Responsibility, and Respect</i> at all times   |
| <b>2-C: Managing Classroom Procedures</b>   |   |   |  |
| Teacher does not support scholar ownership of learning; classroom routines and parent volunteers present a major distraction from the rhythm of instruction     | Teacher provides limited opportunities for scholar ownership of learning through fun, discovery, or shared responsibility; classroom routines or parent volunteers present a distraction from the rhythm of instruction | Teacher encourages scholar ownership of learning through opportunities for fun, discovery, and/or shared responsibility; classroom routines and/or parent volunteers maintain the rhythm of instruction             | Teacher universally engages scholar ownership of learning through multiple opportunities for fun, discovery, and shared responsibility; classroom routines and parent volunteers enhance the rhythm of instruction             |
| <b>2-D: Managing Scholar Behavior</b>   |   |   |  |
| Teacher does not establish rules for movement, verbal participation, or the use of signals; teacher neglects to communicate or enforce behavioral expectations  | Teacher establishes limited rules for movement, verbal participation, or the use of signals; teacher establishes minimal behavioral expectations  | Teacher promotes positive behavior through rules for movement, verbal participation, and/or the use of signals; teacher enforces a specific behavioral process  | Teacher promotes universally positive behavior through well-established rules for movement, verbal participation, and the use of signals with scholar input; scholars self-monitor their own behavior                          |
| <b>2-E: Organizing Physical Space</b>   |   |   |  |
| Teacher does not arrange the timeline or physical space to support scholar discovery, birth order connections, or opportunities for exploring teachable moments | Teacher arranges the timeline and/or physical space to support limited scholar discovery, birth order connections, and/or opportunities for exploring teachable moments   | Teacher arranges the timeline and physical space to support scholar discovery, birth order connections, and/or opportunities for exploring teachable moments related to the theme                                   | Teacher and scholars arrange the timeline and physical space to support scholar discovery, birth order connections, and opportunities for exploring teachable moments related to the theme                                     |

| DOMAIN 3: INSTRUCTION  |  |  |   |
|--|--|--|---|
| <i>Failing (1)</i>   | <i>Needs Improvement (2)</i>   | <i>Proficient (3)</i>  | <i>Distinguished (4)</i>  |
| <b>3-A: Communicating Clearly and Accurately</b>   |  |  |   |
| Teacher does not connect the lesson with the theme or with prior scholar knowledge, experience, or interests   | Teacher minimally connects the lesson with the theme or with prior scholar knowledge, experience, or interests   | Teacher purposefully connects the lesson with the theme/timeline and with prior scholar knowledge, experience, and/or interests  | Teacher purposefully connects the lesson with the theme/timeline and with prior scholar knowledge, experience, and interests; students engage in making purposeful connections with their peers   |
| <b>3-B: Using Questioning and Discussion Techniques</b>  |  |  |   |
| Teacher does not elicit scholar inquiry or scholar participation   | Teacher questions elicit limited scholar inquiry and/or complex thinking where appropriate; teacher-led discussions explore questions at the Skill/Concept level with frequent prompting for scholar participation | Teacher questions and appropriate wait time elicit scholar inquiry and/or complex thinking where appropriate; teacher-led discussions explore questions at the Strategic Thinking level with limited prompting for scholar participation | Teacher questions and appropriate wait time elicit high-level scholar inquiry and complex thinking where appropriate; scholar-led discussions explore questions at the Extended Thinking level with unsolicited scholar participation                       |
| <b>3-C: Engaging Scholars in Learning</b>  |  |  |   |
| Teacher does not use real-life examples to prompt processes related to the content; scholars are in "not learning" mode                                      | Teacher uses limited real-life examples to prompt teacher-directed processes for reporting back information; scholars are passively involved in the learning   | Teacher uses real-life examples to promote enthusiasm and prompt teacher-directed discovery and collaboration; scholars internally reflect Values and Virtues that show active engagement in the lesson/topic                            | Teacher uses real-life examples to promote enthusiasm and prompt scholar-directed discovery and collaboration that applies to the real-world; scholars internally and externally reflect Values and Virtues that show a vested interest in the lesson/topic |
| <b>3-D: Using Assessment in Instruction</b>  |  |  |   |
| Teacher does not use formal or informal assessment strategies or provide scholar feedback  | Teacher uses limited formal or informal assessment strategies and provides limited scholar feedback  | Teacher uses either formal or informal assessment strategies to provide constructive scholar feedback; scholars assess their own work or the work of their peers using teacher-generated rubrics   | Teacher uses both formal and informal assessment strategies to provide timely and constructive scholar feedback; scholars assess their own work and the work of their peers using scholar-generated rubrics   |
| <b>3-E: Demonstrating Flexibility &amp; Responsiveness</b>   |  |  |   |
| Teacher does not make lesson adjustments to differentiate for scholar readiness, enhance learning, encourage scholar discovery, or explore teachable moments | Teacher makes limited lesson adjustments to differentiate for scholar readiness, enhance learning, encourage scholar discovery, or explore teachable moments   | Teacher makes lesson adjustments to differentiate for scholar readiness, enhance learning by modeling activities, encourage scholar discovery, and/or explore spontaneous teachable moments as they arise                                | Teacher makes frequent lesson adjustments to differentiate for scholar readiness/interests, enhance learning by modeling activities, encourage scholar discovery, and explore spontaneous teachable moments as they arise                                   |



| DOMAIN 4: PROFESSIONAL RESPONSIBILITIES  |  |   |   |
|--|--|---|---|
| <i>Failing (1)</i>   | <i>Needs Improvement (2)</i>   | <i>Proficient (3)</i>   | <i>Distinguished (4)</i>  |
| <b>4-A: Reflecting on Teaching</b>   |  |   |   |
| Teacher does not foster relationships that encourage scholar performance or diagnose the effectiveness of lessons  | Teacher develops limited relationships that encourage scholar performance; future lesson adjustments, if any, are minimal  | Teacher sets expectations and/or develops relationships that challenge, encourage, and/or inspire high levels of scholar performance and/or growth; future lesson adjustments are inspired by peer feedback | Teacher sets high expectations and develops strong relationships that challenge, encourage, and inspire high levels of scholar performance and growth; future lesson adjustments are inspired by scholar and peer feedback          |
| <b>4-B: Maintaining Accurate Records</b>   |  |   |   |
| Teacher does not use any formative or summative assessment strategies  | Teacher uses limited formative or summative assessment strategies to record scholar growth; collected data is rarely used to modify instruction                  | Teacher uses formative or summative assessment strategies to record scholar growth; collected data is sometimes used to modify instruction  | Teacher uses formative and summative assessment strategies to record scholar growth; collected data is consistently used to modify instruction and promote scholar reflection   |
| <b>4-C: Communicating with Families</b>  |  |   |   |
| Teacher does not attempt to develop relationships with scholars, parents, or the greater school community; interactions may be unprofessional or nonexistent | Teacher develops limited relationships with scholars, parents, or the greater school community; interactions are professional but fail to consider scholar needs | Teacher develops positive relationships with scholars, parents, and/or the greater school community; interactions are professional and embrace the diverse needs of scholars and/or their families          | Teacher purposefully develops positive and effective relationships with scholars, parents, and the greater school community; interactions are professional, proactive, and embrace the diverse needs of scholars and their families |
| <b>4-D: Participating in a Professional Community</b>  |  |   |   |
| Teacher does not participate in sponsored activities; relationships with colleagues are occasionally confrontational   | Teacher participates indirectly in sponsored activities; relationships with colleagues are cordial   | Teacher actively participates in sponsored activities and contributes to a culture of professional inquiry; relationships with colleagues are supportive and/or collaborative                               | Teacher actively leads sponsored activities and establishes a culture of professional inquiry; relationships with colleagues are universally supportive and collaborative   |
| <b>4-E: Growing &amp; Developing Professionally</b>  |  |   |   |
| Teacher does not attend professional development opportunities and is not receptive feedback from stakeholders   | Teacher attends limited professional development opportunities, tolerates instructional coaching, and/or is receptive to minimal feedback from stakeholders      | Teacher attends required professional development opportunities, supports instructional coaching, and/or is receptive to feedback from stakeholders   | Teacher proactively seeks out and attends professional development opportunities, embraces instructional coaching, and is receptive to feedback from stakeholders   |
| <b>4-F: Showing Professionalism</b>  |  |   |   |
| Teacher does not model integrity and does not reflect a general need to advocate for students nor to grow professionally                                     | Teacher models honesty and integrity while reflecting a general need to advocate for students, but not to grow professionally                                    | Teacher models honesty, integrity, and/or virtue while reflecting a general need to advocate for students and to grow professionally  | Teacher models honesty, integrity, and virtue while reflecting a proactive and comprehensive need to advocate for students and to grow professionally   |

### PLANNING & PREPARATION

Score:

Rating:

### INSTRUCTION

Score:

Rating:

### CLASSROOM ENVIRONMENT

Score:

Rating:

### PROFESSIONAL RESPONSIBILITIES

Score:

Rating:

### OVERALL SCORE/RATING

### COMMENTS



Report generated on each teacher in the school. This details the domain areas of strength and weakness as well as a graphical analysis of areas of success in the classroom.

**NAME:** Jane Doe - janedoe@sample.com

**OBSERVER:** John Doe - johndoe@sample.com

**WALKTHROUGH DATE:** 01/01/2019 12:39 PM EST

**PRE-OBSERVATION CONFERENCE NOTES:**

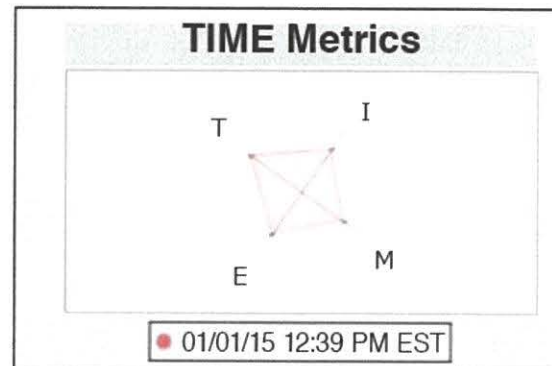
Students were solving a mystery surrounding the play, Macbeth.

**DATE OF POST-OBSERVATION CONFERENCE:**  
01/05/2019

**LESSON SUMMARY:**

Briefly summarize the lesson observed. What is the discipline/content area? What is the coaching focus? What is the lesson objective?

SWBAT to write a letter offering advice to the next king based on their analysis of the play, Macbeth, and create a movie trailer to entice their peers about the play.



**Ethos Logos Performance Level**

**4.25**  
Excellence

**Classical Learning Level**

**2.95**  
Strong

---

**FIRST IMPRESSIONS UPON ENTERING CLASSROOM**

**WHAT IS THE TEACHER DOING?**

- ✓ Standing and delivering content
- Modeling a process/concept
- Facilitating small group instruction
- Conducting a whole group review
- Personalizing a learning episode

*Comments:*

**WHAT ARE THE SCHOLARS DOING?**

- ✓ Watching the teacher and/or taking notes
- ✓ Responding orally to teacher-directed questions
- Asking questions and/or seeking clarification
- Conducting a turn-and-talk with other scholar(s)
- Working independently on project/assignment
- Participating in a Socratic seminar

*Comments:*

**WHAT IS THE FEELING/TONE OF THE CLASSROOM?**

- ✓ Positive scholar to scholar interactions
- ✓ Positive scholar to teacher interactions
- Productive learning habits are the norm
- ✓ Classroom conducive to learning

*Comments:*

**DOES THE ROOM REFLECT LEMAN CLASSICAL STANDARDS?**

- ✓ Timeline
- ✓ Orderly
- Clean
- Professional
- ✓ Caring
- ✓ Citizenship
- Perseverance
- ✓ Respect
- Responsibility
- Trustworthiness

*Comments:*

**IS INSTRUCTIONAL TIME FOCUSED ON THE TASK**

- ✓ Yes
- No

*Comments:*

---

**TEACHER ACTIONS****MANAGEMENT OF CLASSROOM:**

- Routines are not defined, lack of respect by scholars to teacher & each other
- Some scholars following expectations, routines are being established
- Most scholars are following expectations, routines are established
- ✓ Commands respect, routines are norms and followed by all
- Tenacious in getting scholars to be self-disciplined, masters really discipline, poised, dynamic, self-assured, incentives are intrinsically motivated

*Comments:*

**INSTRUCTIONAL PLANNING & DELIVERY:**

- Not planned, no observable objectives
- Some planning is evident, objectives are evident but not clear or articulated
- ✓ Well-planned lesson, clear objectives, mixture of good and learning adequate materials
- Purposeful objectives, big ideas, essential questions, themes, and effective learning materials that allow for exploration and discovery
- Objectives highly relevant, hooks all scholars, masterful in connections with real life

*Comments:*

---

**SCHOLAR ACTIONS****THINKING:**

- Scholars are not observed to be thinking or engaged in the learning
- Scholars display knowledge and/or understanding of topic
- ✓ Scholars apply the learning to new and different situations
- Scholars analyze interrelationships, ideas, and themes
- Scholars synthesize and evaluate the big ideas, themes, and relationships from the learning

*Comments:*



**ENGAGED LEARNING:**

- < 70%
- 71% - 80%
- ✓ 81% - 90%
- 90% - 95%
- 96% - 100%

*Comments:*

---

**CLASSICAL LEARNING****HUMOR AND FUN:**

- Very little fun and humor observed in classroom
- Humor and fun were observed and contributed to learning environment
- ✓ Fun and humor were consistently used that created a positive learning environment

*Comments:*

**INTEGRATION/CONNECTION TO DISCIPLINES:**

- ✓ Only observed subject being taught; no integration with other disciplines
- Integration and connections were attempted involving other disciplines
- Natural connections and integration across subjects were made

*Comments:*

**VIRTUES AND VALUES:**

- No virtues or values were mentioned
- ✓ Virtues and values were highlighted but not deeply integrated
- Full integration of virtues and value

*Comments:*

**THE BIG WHY? (PURPOSE/LIFE):**

- No purpose was shared
- The Big Why of the topic was mentioned
- ✓ The Big Why and deeper purpose was consistently discussed

*Comments:*

**CHARLOTTE MASON INFLUENCE:**

- No influence was observed of C. Mason
- ✓ A few of C. Mason influences were observed and noted
- The teacher implemented numerous C. Mason strategies

*Comments:*

**TEACHER TALK VS. SCHOLAR TALK:**

- Teacher talked most of the time
- ✓ There was a balance between teacher talk and scholar talk
- Teacher talked less than the scholars

*Comments:*

\_\_\_\_\_

## TEACHER INFO

### STRENGTHS OF THE LESSON

## REFINEMENTS OF THE LESSON

**TO BE FILLED OUT DURING POST CONFERENCE WITH PROFESSIONAL DEVELOPMENT COACH**

© 2006 The Authors  
Journal compilation © 2006 Blackwell Publishing Ltd



### TEACHER ACTIONS: Check the HIGHEST LEVEL practice observed only

#### Management of Classroom

- ☐ Routines are not defined, lack of respect by scholars to teacher & each other
- ☐ Some scholars following expectations, routines are being established
- ☐ Most scholars are following expectations, routines are established
- ☐ Commands respect, routines are norms and followed by all
- ☐ Tenacious in getting scholars to be self-disciplined, masters reality discipline, poised, dynamic, self-assured, incentives are intrinsically motivated

Comments:

#### Instructional Planning & Delivery

- ☐ Not planned, no observable objectives
- ☐ Some planning is evident, objectives are evident but not clear or articulated
- ☐ Well-planned lesson, clear objectives, good variety of learning materials
- ☐ Purposeful objectives, big ideas, essential questions, themes, and effective learning materials that allow for exploration and discovery
- ☐ Objectives highly relevant, hooks all scholars, masterful in connections with real life

Comments:

### SCHOLAR ACTIONS: Check the HIGHEST LEVEL practice observed only

#### Thinking

- ☐ Scholars are not observed to be thinking or engaged in the learning
- ☐ Scholars display knowledge and/or understanding of topic
- ☐ Scholars apply the learning to new and different situations
- ☐ Scholars analyze interrelationships, ideas, and themes
- ☐ Scholars synthesize and evaluate the big ideas, themes, and relationships from the learning

Comments:

#### Engaged Learning

- ☐ < 70%
- ☐ 71% - 80%
- ☐ 81% - 90%
- ☐ 90% - 95%
- ☐ 96% - 100%

Comments:

### CLASSICAL LEARNING: Check the HIGHEST LEVEL practice observed only

#### Humor and Fun

- ☐ Very little fun and humor observed in classroom
- ☐ Humor and fun were observed and contributed to learning environment
- ☐ Fun and humor were consistently used that created a positive learning environment

Comments:

#### Integration/Connection to Disciplines

- ☐ Only observed subject being taught; no integration with other disciplines
- ☐ Integration and connections were attempted involving other disciplines
- ☐ Natural connections and integration across subjects were made

Comments:

#### Virtues and Values

- ☐ No virtues or values were mentioned
- ☐ Virtues and values were highlighted but not deeply integrated
- ☐ Full integration of virtues and values

Comments:

#### The Big Why? (Purpose/Life)

- ☐ No purpose was shared
- ☐ The Big Why of the topic was mentioned
- ☐ The Big Why and deeper purpose was consistently discussed

Comments:

#### Charlotte Mason Influence

- ☐ No influence was observed of C. Mason
- ☐ A few of C. Mason influences were observed and noted
- ☐ The teacher implemented numerous C. Mason strategies

Comments:

#### Teacher Talk vs. Scholar Talk

- ☐ Teacher talked most of the time
- ☐ There was a balance between teacher talk and scholar talk
- ☐ Teacher talked less than the scholars

Comments:

This form is completed during the observation by the PD/Data/Curriculum Director and or the site Administrators. The Coach then compares the teacher self evaluation and has a starting point for the teachers professional development plan. These observations happen multiple times per year, both as pops ins and as formal reviews. All the coach data is aggregated and compiled so the administration can observe individual and campus wide trends.

### OBSERVATION INFO

#### Teacher Information

Observer Name:

Date:

Time:

School Name:

Teacher Observed:

Pre-Observation Conference Notes:

Date of Post-Observation Conference:

#### Lesson Summary

Briefly summarize the lesson observed. What is the discipline/ content area? What is the coaching focus? What is the lesson objective?

### FIRST IMPRESSIONS UPON ENTERING CLASSROOM: *Check ANY practice observed*

#### What is the teacher doing?

- ☐ Standing and delivering content
- ☐ Modeling a process/concept
- ☐ Facilitating small group instruction
- ☐ Conducting a whole group review
- ☐ Personalizing a learning episode

Comments:

#### What are the scholars doing?

- ☐ Watching the teacher and/or taking notes
- ☐ Responding orally to teacher-directed questions
- ☐ Asking questions and/or seeking clarification
- ☐ Conducting a turn-and-talk with other scholar(s)
- ☐ Working independently on project/assignment
- ☐ Participating in a Socratic seminar

Comments:

#### Is instructional time focused on the task?

- ☐ Yes
- ☐ No

Comments:

#### What is the feeling/tone of the classroom?

- ☐ Positive scholar to scholar interactions
- ☐ Positive scholar to teacher interactions
- ☐ Productive learning habits are the norm
- ☐ Classroom conducive to learning

Comments:

#### Does the room reflect Leman Classical Standards?

- ☐ Timeline
- ☐ Orderly
- ☐ Clean
- ☐ Professional
- ☐ Caring
- ☐ Citizenship
- ☐ Perseverance
- ☐ Respect
- ☐ Responsibility
- ☐ Trustworthiness

Comments:



### TEACHER ACTIONS: Check the HIGHEST LEVEL practice observed only

#### Management of Classroom

- ☐ Routines are not defined, lack of respect by scholars to teacher & each other
- ☐ Some scholars following expectations, routines are being established
- ☐ Most scholars are following expectations, routines are established
- ☐ Commands respect, routines are norms and followed by all
- ☐ Tenacious in getting scholars to be self-disciplined, masters reality discipline, poised, dynamic, self-assured, incentives are intrinsically motivated

Comments:

#### Instructional Planning & Delivery

- ☐ Not planned, no observable objectives
- ☐ Some planning is evident, objectives are evident but not clear or articulated
- ☐ Well-planned lesson, clear objectives, good variety of learning materials
- ☐ Purposeful objectives, big ideas, essential questions, themes, and effective learning materials that allow for exploration and discovery
- ☐ Objectives highly relevant, hooks all scholars, masterful in connections with real life

Comments:

### SCHOLAR ACTIONS: Check the HIGHEST LEVEL practice observed only

#### Thinking

- ☐ Scholars are not observed to be thinking or engaged in the learning
- ☐ Scholars display knowledge and/or understanding of topic
- ☐ Scholars apply the learning to new and different situations
- ☐ Scholars analyze interrelationships, ideas, and themes
- ☐ Scholars synthesize and evaluate the big ideas, themes, and relationships from the learning

Comments:

#### Engaged Learning

- ☐ < 70%
- ☐ 71% - 80%
- ☐ 81% - 90%
- ☐ 90% - 95%
- ☐ 96% - 100%

Comments:

### CLASSICAL LEARNING: Check the HIGHEST LEVEL practice observed only

#### Humor and Fun

- ☐ Very little fun and humor observed in classroom
- ☐ Humor and fun were observed and contributed to learning environment
- ☐ Fun and humor were consistently used that created a positive learning environment

Comments:

#### Integration/Connection to Disciplines

- ☐ Only observed subject being taught; no integration with other disciplines
- ☐ Integration and connections were attempted involving other disciplines
- ☐ Natural connections and integration across subjects were made

Comments:

#### Virtues and Values

- ☐ No virtues or values were mentioned
- ☐ Virtues and values were highlighted but not deeply integrated
- ☐ Full integration of virtues and values

Comments:

#### The Big Why? (Purpose/Life)

- ☐ No purpose was shared
- ☐ The Big Why of the topic was mentioned
- ☐ The Big Why and deeper purpose was consistently discussed

Comments:

#### Charlotte Mason Influence

- ☐ No influence was observed of C. Mason
- ☐ A few of C. Mason influences were observed and noted
- ☐ The teacher implemented numerous C. Mason strategies

Comments:

#### Teacher Talk vs. Scholar Talk

- ☐ Teacher talked most of the time
- ☐ There was a balance between teacher talk and scholar talk
- ☐ Teacher talked less than the scholars

Comments:

## **Attachment 25: Proposed School Calendar (Annual)**

Provide the proposed calendar for the first year of operation, including the first and last day of school, any planned breaks, and the total number of minutes of instruction.



# 2021/22 School Calendar



| Month    | Su | Mo | Tu | We | Th | Fr | Sa | Instr Days | Total Days | Federal holidays / notes  |
|----------|----|----|----|----|----|----|----|------------|------------|---|
| Aug 2021 | 1  | 2  | 3  | 4  | 5  | 6  | 7  |            |            | 3-11 - Teacher In Service – Staff Development   |
|          | 8  | 9  | 10 | 11 | 12 | 13 | 14 |            |            | 12 – First Day of School  |
|          | 15 | 16 | 17 | 18 | 19 | 20 | 21 |            |            | 18 – Early Release – Staff Development  |
|          | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 14 days    |            | 25 – Early Release - Staff Development  |
|          | 29 | 30 | 31 | 1  | 2  | 3  | 4  |            |            | 3 – Teacher In Service – Staff Development  |
| Sep      | 5  | 6  | 7  | 8  | 9  | 10 | 11 |            |            | 6 -Labor Day – No School – 8 Early Release – Staff Development  |
|          | 12 | 13 | 14 | 15 | 16 | 17 | 18 |            |            | 15 – Early Release – Staff Development  |
|          | 19 | 20 | 21 | 22 | 23 | 24 | 25 |            |            | 22 – Early Release – Staff Development  |
|          | 26 | 27 | 28 | 29 | 30 | 1  | 2  | 21 days    |            | 29 – Early Release – Staff Development  |
|          | 3  | 4  | 5  | 6  | 7  | 8  | 9  |            |            | 6 – Early Release – Staff Development   |
| Oct      | 10 | 11 | 12 | 13 | 14 | 15 | 16 |            |            | 13 – Early Release – Staff Development  |
|          | 17 | 18 | 19 | 20 | 21 | 22 | 23 |            |            | 20 – Early Release – Staff Development  |
|          | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 21 days    |            | 27 – Early Release – Staff Development  |
|          | 31 | 1  | 2  | 3  | 4  | 5  | 6  |            |            | 3 – Early Release – Staff Development   |
|          | 7  | 8  | 9  | 10 | 11 | 12 | 13 |            |            | 10 – Early Release – Staff Development  |
| Nov      | 14 | 15 | 16 | 17 | 18 | 19 | 20 |            |            | 17 – Early Release – Staff Development  |
|          | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 17 days    |            | 22-26 -Thanksgiving Break – No School   |
|          | 28 | 29 | 30 | 1  | 2  | 3  | 4  |            |            | 1 – Early Release – Staff Development   |
|          | 5  | 6  | 7  | 8  | 9  | 10 | 11 |            |            | 8 – Early Release – Staff Development   |
|          | 12 | 13 | 14 | 15 | 16 | 17 | 18 |            |            | 15 – Early Release – Staff Development  |
| Dec      | 19 | 20 | 21 | 22 | 23 | 24 | 25 |            |            | 20 – 31 -Christmas Break – No School  |
|          | 26 | 27 | 28 | 29 | 30 | 31 | 1  | 13 days    | 86         |   |
|          | 2  | 3  | 4  | 5  | 6  | 7  | 8  |            |            | 3 – Start of Second Semester - 5 – Early Release – Staff Development  |
|          | 9  | 10 | 11 | 12 | 13 | 14 | 15 |            |            | 12 – Early Release – Staff Development  |
|          | 16 | 17 | 18 | 19 | 20 | 21 | 22 |            |            | 17 – MLK Day – No School 19 – Early Release – Staff Development   |
| Jan 2022 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 20 days    |            | 26 – Early Release – Staff Development  |
|          | 30 | 31 | 1  | 2  | 3  | 4  | 5  |            |            | 2 – Early Release – Staff Development   |
|          | 6  | 7  | 8  | 9  | 10 | 11 | 12 |            |            | 9 – Early Release – Staff Development   |
|          | 13 | 14 | 15 | 16 | 17 | 18 | 19 |            |            | 16 – Early Release – Staff Development  |
|          | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 20 days    |            | 23 – Early Release – Staff Development  |
| Feb      | 27 | 28 | 1  | 2  | 3  | 4  | 5  |            |            | 2 – Early Release – Staff Development   |
|          | 6  | 7  | 8  | 9  | 10 | 11 | 12 |            |            | 7-11 – Spring Break – No School   |
|          | 13 | 14 | 15 | 16 | 17 | 18 | 19 |            |            | 16 – Early Release – Staff Development  |
|          | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 18 days    |            | 23 – Early Release – Staff Development  |
|          | 27 | 28 | 29 | 30 | 31 | 1  | 2  |            |            | 30 – Early Release – Staff Development  |
| Mar      | 3  | 4  | 5  | 6  | 7  | 8  | 9  |            |            | 6 – Early Release – Staff Development   |
|          | 10 | 11 | 12 | 13 | 14 | 15 | 16 |            |            | 15 – Good Friday – No School 13 – Early Release – Staff Development   |
|          | 17 | 18 | 19 | 20 | 21 | 22 | 23 |            |            | 20 – Early Release – Staff Development  |
|          | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 20 days    | 164        | 27 – Early Release – Staff Development  |
|          | 1  | 2  | 3  | 4  | 5  | 6  | 7  |            |            | 4 – Early Release – Staff Development   |
| May      | 8  | 9  | 10 | 11 | 12 | 13 | 14 |            |            | 11 – Early Release – Staff Development  |
|          | 15 | 16 | 17 | 18 | 19 | 20 | 21 |            |            | 18 – Early Release – Staff Development  |
|          | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 18 days    | 183        | 26 – End of School – Early Release - 183 Days of Instruction  |
|          | 29 | 30 | 31 | 1  | 2  | 3  | 4  |            |            |   |
|          | 5  | 6  | 7  | 8  | 9  | 10 | 11 |            |            | 36 early release days – 345 min of instruction (1 <sup>st</sup> to 5 <sup>th</sup> ) 330 min of instruction (6 <sup>th</sup> to 8 <sup>th</sup> ) |
| Jun      | 12 | 13 | 14 | 15 | 16 | 17 | 18 |            |            | 147 full days – 430 min of instruction (1 <sup>st</sup> to 5 <sup>th</sup> ) 440 min of instruction (6 <sup>th</sup> to 8 <sup>th</sup> )         |
|          | 19 | 20 | 21 | 22 | 23 | 24 | 25 |            |            | Total K5 minutes/year = 75,630 Total 6-8 <sup>th</sup> minutes/year = 76,560  |
|          | 26 | 27 | 28 | 29 | 30 | 1  | 2  |            |            |   |
|          | 3  | 4  | 5  | 6  | 7  | 8  | 9  |            |            | Grading Periods –   |
|          | 10 | 11 | 12 | 13 | 14 | 15 | 16 |            |            | Aug 12 to Oct 22 - Oct 25 to Dec 15   |
| Jul      | 17 | 18 | 19 | 20 | 21 | 22 | 23 |            |            | Jan 3 to March 25 - March 28 to May 26  |
|          | 24 | 25 | 26 | 27 | 28 | 29 | 30 |            |            | STAAR (Tentative) April 5-8 and May 3-13 (Closed Campus)  |
|          | 31 | 1  | 2  | 3  | 4  | 5  | 6  |            |            |   |

## **Attachment 26: Proposed School Schedules**

Provide teacher and student versions of proposed school schedules for a sample day and a sample week.



**1st to 5th Grade (Full)**

CLASS SCHEDULE: 7:45am – 2:55pm  
Full Day Schedule (M, T, Th, F)

| Activity                                       | Time of Instruction |
|--|---------------------|
| Attendance, Pledge & Recitation                | 10 minutes          |
| Language Arts Block                            | 80 minutes          |
| Math   | 60 minutes          |
| Recess & Snack                                 | 20 minutes          |
| Latin – Language Block                         | 30 minutes          |
| Science  | 35 minutes          |
| Lunch  | 35 minutes          |
| History Classical Block w/Science, Art & Music | 55 minutes          |
| Specials Rotation (P.E., Art or Music)         | 45 minutes          |
| Independent Reading                            | 35 minutes          |
| Read Aloud                                     | 20 minutes          |

Minutes of Instruction – 430 full day  
147 full days of instruction = 63,210

**1st to 5th Grade (Half)**

7:45am –  
WEDNESDAY SCHEDULE: 1:30pm  
Early Release - (Wednesdays)

| Activity                              | Time of Instruction |
|---------------------------------------|---------------------|
| Attendance, Pledge & Recitation       | 10 minutes          |
| Language Arts Block                   | 80 minutes          |
| Math                                  | 60 minutes          |
| Recess & Snack                        | 20 minutes          |
| Math/ELA Extension                    | 35 minutes          |
| Science                               | 30 minutes          |
| Lunch                                 | 30 minutes          |
| Read Aloud                            | 15 minutes          |
| History Classical Block               | 35 minutes          |
| Specials Rotation (P.E., Art & Music) | 30 minutes          |

345 minutes of instruction  
36 Early Release Days per year = 12,420

**Total Days: 183 Total Minutes: 75,630**

**NOTE:** Latin is 4x per week on M, T, Th. & Fri. Teachers may use the 35 minutes in Wednesday's schedule for extra emphasis in Math or Language Arts.



#### 6<sup>th</sup> to 8th Grade Class Schedules

CLASS SCHEDULE: 7:50am – 3:00pm  
Full Day Schedule (M, T, Th, F)

| Activity                        | Time of Instruction |
|---------------------------------|---------------------|
| Attendance, Pledge & Recitation | 10 minutes          |
| Period 1                        | 55 minutes          |
| Period 2                        | 55 minutes          |
| Period 3                        | 55 minutes          |
| Period 4                        | 55 minutes          |
| Lunch                           | 55 minutes          |
| Period 5                        | 55 minutes          |
| Period 6                        | 55 minutes          |
| Period 7                        | 55 minutes          |

Minutes of Instruction – 440 full day  
147 full days of instruction = 64,680

#### 6<sup>th</sup> to 8th Grade Class Schedules

7:45 am – 1:15 pm  
WEDNESDAY SCHEDULE:  
Early Release - (Wednesdays)

| Activity   | Time of Instruction |
|--|---------------------|
| Attendance, Pledge & Recitation (SEL, Culture Building, Student Gov) | 30 minutes          |
| Period 1   | 45 minutes          |
| Period 2   | 45 minutes          |
| Period 3   | 45 minutes          |
| Period 4   | 45 minutes          |
| Lunch  | 45 minutes          |
| Period 5   | 45 minutes          |
| Period 6   | 45 minutes          |
| Period 7   | 45 minutes          |

Minutes of Instruction - 330 early release  
36 Early Release Days per year = 11,880

**Total Minutes of Instruction = 76,560**





## Attachment 27: Proposed Admissions and Enrollment Policy

Provide a draft of an Admissions and Enrollment Policy, which should include the following:

- Brief summary of the application and enrollment processes.
- Non-discrimination statement to be included in the proposed school's admissions policy that meets the requirements of Texas Education Code §12.111(a)(5).
- Tentative start and end dates for the application window and the enrollment period. See Texas Education Code §12.117.
- Policies and procedures to be followed in conducting a lottery when a grade or class is oversubscribed, including any exemptions from the lottery. Include whether the charter school will exercise the right to exempt from the lottery returning students, the siblings of returning students, and/or the children of the school's founders and staff (as long as the total number of students allowed constitutes only a small percentage of the total enrollment).
- The approximate date on which a lottery will be conducted, if required.
- Enrollment deadlines and procedures, including an explanation of how the school will receive and process intent to enroll forms.
- Policies and procedures for the admission of students with a documented history of a criminal offense, a juvenile court adjudication, or discipline problems described in Subchapter A, Chapter 37. See Texas Education Code §12.111(a)(5)(A).
- Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.
- Explanation of the purpose of any pre-admission activities for students or parents.

**Enrollment deadlines and procedures.** If the proposed school will specialize in the performing arts, discuss whether potential students must demonstrate artistic ability as a requirement for admission to the school. Texas Education Code §12.111(a)(5)(B) permits a charter school specializing in performing arts to have an admissions policy that requires a student to demonstrate artistic ability. In addition, Texas Education Code §12.1171 permits a charter school specializing in one or more of the performing arts to require an applicant to audition for admission to the school.



## Admission Protocols and Procedures

*Framework for Cato Classical Academy Enrollment Process (Pending final Governing Board Approval – In compliance with the most up to date TEA directives).*

When recruiting students, Cato Classical Academy will target all segments of the parent community. Our school will recruit in a manner that does not discriminate against students of a particular race, color, national origin (including English language learners), religion, or sex, or against students with disabilities. Once a student has been admitted to the charter school through an appropriate process, he or she may remain in attendance through subsequent grades. A new applicant for admission to the charter school, however, would be subject to the lottery if, as of the application closing date, the total number of applicants exceeds the number of spaces available at the charter school.

### **Enrollment Timeline and Policy.**

The Cato Classical Academy Governing Board will establish its own enrollment timeline based on board adopted policy and in compliance with TEA, Open Charter School requirements. Below are the guidelines for application for enrollment to Cato Academy:

1. Returning students (students who currently attended the school and intend to return the next school year) are given priority in admission, if they notify the school of their intent to return for the next school year by the 2<sup>nd</sup> Friday of January of each school year.
2. To be eligible for kindergarten, a scholar must be five (5) years of age prior to September 1 of the year the scholar starts kindergarten.
3. Scholars of teachers, staff and Cato Governing Board members and siblings of currently enrolled scholars as well as returning students (that have notified our school that they intend to return) are exempt from the lottery requirements. If there are more of the above described scholars than spaces available, they will be entered into a separate lottery and either admitted if space allows or placed on the waiting list in the order that they are drawn. **Definition of Sibling:** A “sibling” is defined as an immediate family member of the applicant, or a blended family member of the applicant through marriage or guardianship. Birth certificate, marriage certificate or court documentation is necessary to approve the sibling priority. Does not apply to extended family of sibling unless legal documentation of guardianship is provided. The sibling must be currently enrolled Cato Academy. If the sibling withdraws from the academy before applicant is offered enrollment, priority status will be revoked. If the sibling withdraws from the academy before attending at least one day of attendance for the year they are registered, the priority status and any offer/registration of the applicant will be revoked. Priority status does not guarantee placement. Another separate lottery will be held for applicants who do not fall into either of the two abovementioned categories, and who submit applications prior to the deadline. These students will be admitted if there is space or will be placed on the waiting list in the order drawn. For this policy “sibling” shall mean a biological



or legally adopted brother or sister residing in the same household as the applicant. Cousins, nieces, nephews and unrelated children sharing an address with guarantee enrollment of each listed sibling.

4. As long as the total number of students allowed constitutes only a small percentage of the total enrollment, as permitted by federal guidance on the Charter Schools Program.
5. Prior to submitting an application for admission parents and students may be encouraged, but not required, to attend an informational meeting about the School. The Cato Academy Enrollment package will include: Name of Scholar Date of Birth, Name of Parent/Guardian, Address, Contact Information (Phone/Email), Home School District, Current Grade and Grade Level Requested for Admission, Name of Siblings Attending/Applying for Admission, Whether scholar has a documented history of a criminal offense, a juvenile court adjudication, or discipline problems as described in TEC Subchapter A, Chapter 37.
6. The School shall make clear at meetings and in written information provided along with the application that any student Primary and Secondary districts (as defined in this charter application) may apply, although admission is based on the preferences: Primary- Pearland ISD, Secondary, Alvin ISD, Houston ISD.
7. Marketing materials will be provided in English and Spanish languages.
8. The School shall begin publicizing the availability of student positions at the School at least two months prior to the date of the lottery. Lottery date is scheduled for a close of April 1<sup>st</sup> and a drawing for admission on April 10<sup>th</sup>, (within 15 days of application close).
9. The lottery will be conducted using lottery selection software under the supervision of the campus principal or an observer designee and the Superintendent and their designee. This ensures that the winner list and the waiting list are selected randomly. Results of the lottery shall be certified by a notary public.
10. Parents/Guardians will be notified within 24 hours of the lottery or as a potential seat becomes available. Parents/Guardians will receive a phone call, email, and mailed letter notifying them of their admission. If a scholar is going to enroll in Cato Academy, the scholar's parent or guardian must accept enrollment within 10 school days of receiving notice of admission or the spot can be made available to the next scholar/family.
11. If more students apply to the charter school than can be accommodated, the charter school will allocate spaces through a lottery process or fill available positions in the order in which applications were received before the application deadline using notice to the public as provided as required by statute. When the number of applicants exceeds the number of spaces available, students shall be selected by a random lottery, taking into consideration the enrollment preferences outlined in this policy (siblings etc). If additional spaces become available after the initial selection, students shall be offered admission based on their order on the waiting list. Any spaces available after all students on the waiting list have been offered admission shall be filled on a first-come, first-served basis. Waiting lists are not maintained from year to year: students on the waiting list who are not offered admission and wish to be considered for admission the following year must submit a new application, and repeat the lottery process if necessary.
12. The lottery shall be held no earlier than April 10<sup>th</sup> of the year prior to start of school for that lottery being held. Our target open date for the lottery is January 1 of each year.
13. All forms will be provided in English and Spanish. The following documents are requested upon offering admission to the school:
  - a. Certified copy of the child's birth certificate

- b. Current Immunization Record
  - c. Social Security Card for the child (if available)
  - d. Photo ID of Parent or Guardian
  - e. Proof of Residency (Current Utility Bill, Lease Agreement)
    - i. Property deed
    - ii. Mortgage documents
    - iii. Property tax bill
    - iv. Rental agreement or lease (including Section 8 agreement)
    - v. Utility bill (water, electric, gas, cable, phone)
    - vi. W-2 wage statement Payroll stub
    - vii. Other documentation from a state, tribal, or federal agency (Social Security Administration, Veterans' Administration, Texas Department of Economic Security, etc.
  - f. Proof of Income (Tax Return, Current Paystubs, Letter of Employer, etc.), if applying on the basis of being economically disadvantaged
  - g. Court Documentation or letter from Child Protective Services (CPS) establishing foster care, if applying on the basis of conservatorship
14. Based on space availability, the School shall continue to accept students from its waiting list or, if the waiting list is exhausted, from parents submitting applications after the deadline for the lottery up until January 1. The School may accept students after October 1 at its discretion following the schools administrative transfer and enrollment process.
  15. A charter school's admissions policy may not discriminate against students on the basis of sex, national origin, ethnicity, religion, disability, academic, artistic, or athletic ability or the district the child would otherwise attend. **NOTICE OF NON DISCRIMINATION** In accordance with Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, Title II of the Americans with Disabilities Act of 1990, the Boy Scouts of America Equal Access Act and applicable state law, Cato Academy does not discriminate on the basis of actual or perceived race, color, religion, national origin, sex, age, disability, gender identity or expression, or any other classification protected by law in any of its business activities, including its educational programs and activities which comply fully with the requirements of state and federal law and Title IX. In the event of a possible discrimination, the Cato Academy Superintendent, will be the point of contact for any claim.
  16. As authorized by Texas Education Code § 12.111(6), the School reserves the right to exclude from admission a scholar with a documented history of a criminal offense, a juvenile court adjudication, or discipline problems under Texas Education Code, Subchapter A, Chapter 37.
  17. If space is available, an eligible student must be admitted and enrolled on any day at any time of the day and must be counted as and considered a charter student immediately. Open-enrollment charter schools cannot have specified days for admission and/or enrollment of students. State law does not allow for a trial enrollment period at a public school; therefore, there can be no period of time in which a student attends a charter school without being enrolled as a charter school student.



## **Attachment 28: Certificate of Occupancy for Facility**

If the applicant has a certificate of occupancy for the identified facility, provide a copy.

N/A

## **Attachment 29: Evidence that Facility has been Secured**

If the applicant currently owns the facility, has a lease, or has an MOU or other proof of intent to secure a specific facility, provide proof of the commitment.

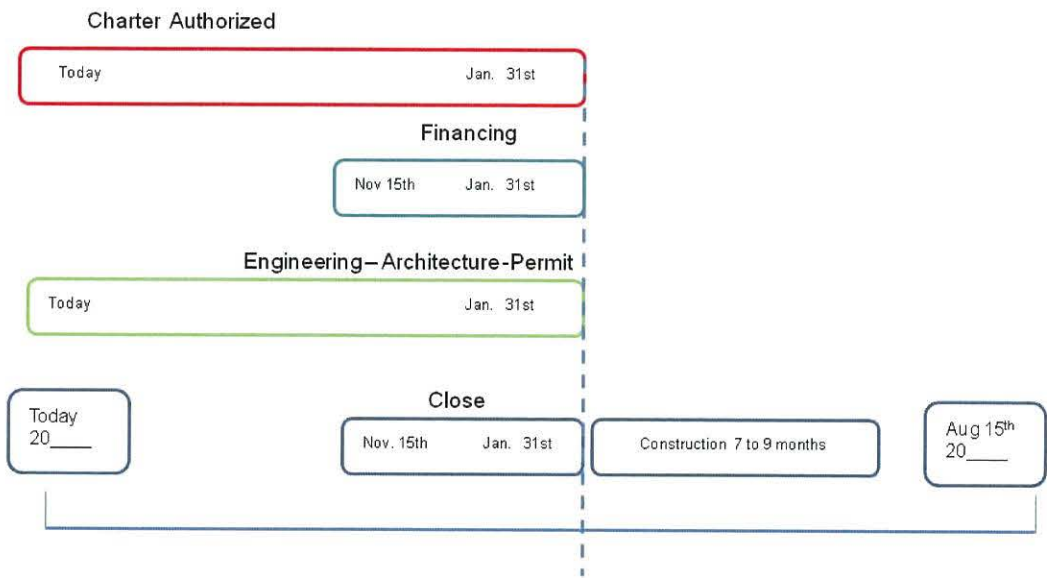
**NA**

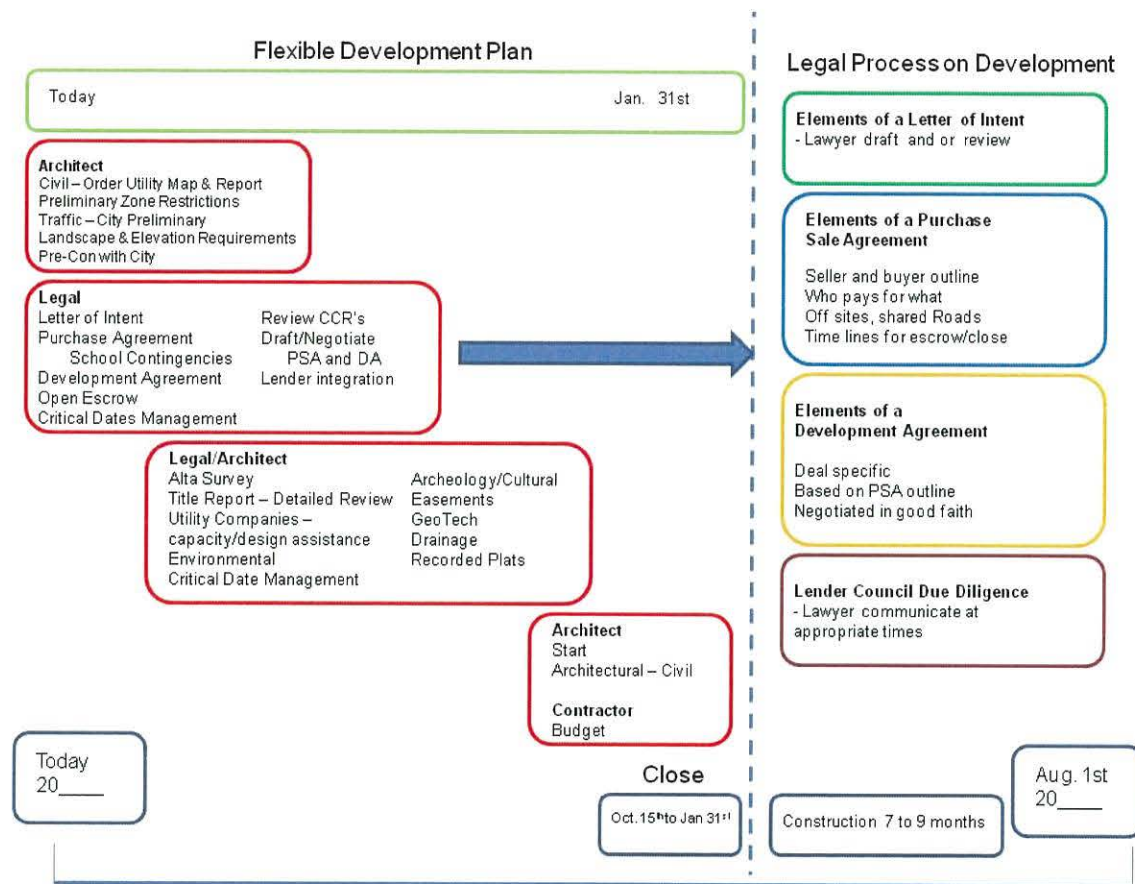


Attachment 30: Detailed Start-up Plan

Provide a detailed start-up plan for Year 0 (September 2020-August 2021).

Below is a schematic of the timeline for procurement, architectural/engineering, city entitlements, financing and construction for the proposed school. The team has overseen 14 construction projects for charters schools and Mrs. McGuire has a 20 year history with local zoning, planning and contracting. The team feels confident with this schedule. The launch date anticipated to start the process is August of 2020 with a completion and Certificate of Occupancy by July of 2021.





**Administration Recruitment and Hiring;** The Superintendent will recruit and hire a school Principal and Business Manager by May of 2021 to assist in the hiring of the teachers and the process of preparing the school for opening.

**Below is a detailed plan for the recruitment and hiring of the teaching staff:** Cato Academy will seek Teachers who are committed, engaged and skillful in their approach to instruction have a powerful, long-term impact on scholars' lives. The quality of instruction is critical to increased scholar learning and achievement in the classroom, and that is why Cato Academy has identified teacher recruitment as an organizational priority. Administration plans to start with its recruitment process in attracting and hiring the very best faculty and staff beginning in December of 2020 and January of 2021 for contracting beginning in July of 2021. Each of the candidates for hire will be treated with professionalism and respect in every stage of the recruitment process. Cato Academy will have Principal position and operations manager in place on or around May of 2021. Employment for both will begin by May 1, 2021. Following the School Principal position being filled, the school will start the process for hiring teachers and support staff.

Employment will begin on July 1, 2021. Teachers will be contracted for 11 months and work 195 contract days, which is reflected in the budget. The Special Education Specialist will be contracted for 10- months and will work 190 contract base days as accounted for in the budget.



The marketing program for teacher recruitment is thorough and has been used by the leadership team in the local market in the past. The recruitment will include job postings, marketing for reach to area teachers and the following detailed plan found in section C2 of this document.

**News Print ADS – Job fair February and March**

2 ads (4 total) job fair - \$318.75 each \$1,275 total

**Mailer**

Variable Data Letters 8.5" x 11" @ .13 = \$ 175.50

Envelopes -#10 – 1500 4.125x9.5 @ .25 = \$ 375

Postage for 1,321 mailers @ \$.25 = \$330.25

Mailing services 1,321 mailers @ \$.19 = \$250.99

Total \$1,031.74

**Website** - Post job openings - TBD

**Social Media** - Promote opening through FB targeting teachers

Total paid ads for 3 months \$2,500

1. Cato Academy plans to share our mission, vision, core values and philosophy when advertising for open teacher and other staff positions in order to attract like-minded candidates whose values fit the values of our school.
2. Share our values, mission and purpose along with our vision for the future of Cato Academy with potential candidates during the interview.
3. We will support our teachers and show we value them by offering a work environment that includes mentorship, supportive leadership, ongoing professional development, teacher collaboration and planning time during the school day.
4. Host a local event with the sole purpose of *Teacher Recruitment* and place advertising of this event on the radio, at nearby colleges and through social media. This event provides an excellent venue to meet potential candidates for hire, allows an opportunity to share the vision and philosophy of the school, and offers an informal way to enter into a relationship with others who have an interest in our school.
5. As we market and advertise our school, post open positions on school website
6. Advertise with online and print edition of the local newspapers.
7. Advertise open positions through use of social media, radio and online job boards.
8. Advertise open positions with job boards of colleges and universities.
9. Establish relationships with the local colleges and universities to open lines of communication within their education programs in order to create a partnership with the local institutions of higher learning.

***Hiring***

Hiring new faculty and other staff may be the most important decisions the senior administrator makes with Cato Academy. A new hire represents the school and its future and along with other new hires will help shape image, culture and scholars for years to come. The hiring decisions are critical to the success of the school and for scholar success in the classroom. The Principal is primarily responsible for overseeing the selection process and will be the one to offer a contract. Cato Academy will offer the following to interested candidates of our school:

1. Submit an application that will be provided online.
2. Check references included with application.

3. Submit a cover letter and resume with application.
  4. Candidate will be asked to participate in a teaching demonstration.
  5. Candidate will be asked to submit a written lesson plan prior to demonstration.
  6. The Principal will conduct the interview; once the administrative team is in place, they will also be a part of the interview process and more than one interview will take place.
- Costs for recruiting and hiring are allocated to the start up budget as Marketing Costs.

Beginning in December of 2020 our marketing buys will start to ramp up as described in the marketing plan. Our enrollment lottery will go live in January of 2021 and the lottery list will start. All prior interest lists will notified of the lottery. These lists have been communicated with and invited to all the events that the school has planned monthly. The idea is to get excitement building around the school and the word of mouth of our efforts to grow.

The applications to enroll will be in both Spanish and English. Once a family enrolls, an electronic communication is generated and our leadership team will reach out via phone and invite the family to any community events we have planned in the near future. The deadline to apply in the lottery will be April 1, 2021. The actual lottery will take place on April 6<sup>th</sup>, 2021. Based on our enrollment goals, we will reserve 78 seats in each grade up to 6<sup>th</sup> grade in year one. Siblings will receive preference per Texas enrollment guidelines. Families will be notified by US Mail, phone and email within 24 hours of the close of the lottery. Once notified the family will have 10 days to respond and accept the position in the school. If a family declines, or does not respond within 10 days we will continue to go down the enrollment list and enroll in order of the lottery draw.

After the initial reenrollment lottery, we will continue to communicate with our enrolled families and look for opportunities to bring the new families together to meet other families, school leadership and their teachers. We will encourage all families to plug in to our social media efforts as a way to share ideas and keep engaged. Our Registrar will reach out for various enrollment documents we may need and the goal from April to school opening it to keep heavy communication with our parents.

Beginning in June, we will hold an open house, at the campus if it is completed or at a convenient location as one more way to connect, inform, solicit feedback and bring our community together.

We will set targets for early, lottery and summer to ensure that we are achieving our enrollment goals. By January of 2021 we are setting a goal of 225 intents to enroll scholars. With the start of our marketing and the outreach from our leadership team, by the lottery (April 1<sup>st</sup>) we have a goal of 375 intents to enroll. Post lottery and before summer, we look to have a wait list in the grades K3 and be at our enrollment targets for 4<sup>th</sup> to 6<sup>th</sup>.

The Superintendent, Principal and Business manage will hold weekly meetings beginning in April/May depending on their hire dates to review enrollments and ensure targets are on track.



## Attachment 31: Financial Plan Workbook

Using the template provided on the [Subchapter D](#) application page, complete the Financial Plan Workbook.

Once complete, applicants are instructed to submit this attachment as follows:

**Hard Copy:** print a hard copy of only the Financial Plan Workbook Summary. This is the RED TAB in the Financial Plan Workbook;

AND

**Electronic Submission:** The entire Financial Plan Workbook, will be submitted electronically as an Excel file.

It is important to budget conservatively and to consider that charter schools often have lower than anticipated attendance rates in the first five years of operation. Therefore, a reasonable planning estimate of \$5,920 per student, which accounts for a daily attendance rate of 80%, should be used when planning and developing the budget.

**Note:** When using a school district as a baseline for supplemental HR forms, make sure the ISD used has the same or close to anticipated average daily attendance (ADA) that the proposed charter school is projecting.

Through a grant application process, federal funds may be available for up to 12 months of post-award planning and up to two years of implementation. However, start-up funds are available for no more than three years. Actual funding depends on the number of eligible charters, the completion of a successful competitive charter grant application, and the continuation of funds from the United States Department of Education. **Start-up funding is NOT to be used for budget purposes and, if awarded, will not be available to the sponsoring entity until the contract for the charter school has been executed, a county-district number has been assigned, and a grant application has been completed and negotiated.**

After these steps are complete, federal funds may only be accessed after a request for reimbursement has been submitted. Generally, federal funds may not be received until after the charter holder has demonstrated that it has incurred an expenditure that represents an allowable cost pursuant to the requirements of the federal award.

**Cato Academy - S.Houston/Alvin/Pearland**  
**FINANCIAL PLAN WORKBOOK SUMMARY**

|  | Start-Up<br>Year 0<br>2021 | Year 1<br>2022      | Year 2<br>2023      | Year 3<br>2024      | Year 4<br>2025      | Year 5<br>2026      |
|--|----------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| <b>REVENUE</b>   |                            |                     |                     |                     |                     |                     |
| Total State Revenue  |                            | \$ 2,310,572        | \$ 3,650,704        | \$ 4,891,943        | \$ 5,234,379        | \$ 5,234,379        |
| Total Federal Revenue  |                            | \$ -                | \$ -                | \$ -                | \$ -                | \$ -                |
| Total Local and Other Revenue                                |                            | \$ 107,100          | \$ 169,218          | \$ 225,060          | \$ 240,814          | \$ 240,814          |
| <b>TOTAL REVENUE</b>   |                            | <b>\$ 2,417,672</b> | <b>\$ 3,819,922</b> | <b>\$ 5,117,003</b> | <b>\$ 5,475,193</b> | <b>\$ 5,475,193</b> |
| <b>EXPENSES</b>  |                            |                     |                     |                     |                     |                     |
| <b>PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES</b>       |                            |                     |                     |                     |                     |                     |
| Total Administrative Staff Personnel Costs                   | \$ 40,700                  | \$ 248,000          | \$ 326,510          | \$ 336,305          | \$ 346,394          | \$ 356,786          |
| Total Instructional Personnel Costs                          | \$ 17,100                  | \$ 973,200          | \$ 1,504,212        | \$ 2,185,878        | \$ 2,251,455        | \$ 2,318,998        |
| Total Non-Instructional Personnel Costs                      | \$ -                       | \$ 122,000          | \$ 125,660          | \$ 201,041          | \$ 207,072          | \$ 213,284          |
| Total Payroll Taxes and Benefits                             | \$ 838                     | \$ 267,968          | \$ 467,575          | \$ 650,851          | \$ 670,376          | \$ 690,487          |
| <b>TOTAL PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES</b> | <b>\$ 58,638</b>           | <b>\$ 1,611,168</b> | <b>\$ 2,423,957</b> | <b>\$ 3,374,075</b> | <b>\$ 3,475,297</b> | <b>\$ 3,579,556</b> |
| <b>NON-PAYROLL RELATED EXPENSES</b>                          |                            |                     |                     |                     |                     |                     |
| Total Contracted Services                                    | \$ -                       | \$ 161,070          | \$ 231,466          | \$ 281,492          | \$ 285,879          | \$ 289,638          |
| Total School Operations                                      | \$ 340,391                 | \$ 132,607          | \$ 212,515          | \$ 264,412          | \$ 282,446          | \$ 288,844          |
| Total Facilities Operations and Maintenance                  | \$ -                       | \$ 435,703          | \$ 911,561          | \$ 1,069,737        | \$ 1,076,788        | \$ 1,078,104        |
| Reserves / Contingencies                                     | \$ -                       | \$ -                | \$ -                | \$ -                | \$ -                | \$ -                |
| <b>TOTAL NON-PAYROLL RELATED EXPENSES</b>                    | <b>\$ 340,391</b>          | <b>\$ 729,380</b>   | <b>\$ 1,355,543</b> | <b>\$ 1,615,641</b> | <b>\$ 1,645,113</b> | <b>\$ 1,656,586</b> |
| <b>TOTAL EXPENSES</b>  | <b>\$ 399,029</b>          | <b>\$ 2,340,548</b> | <b>\$ 3,779,500</b> | <b>\$ 4,989,716</b> | <b>\$ 5,120,410</b> | <b>\$ 5,236,142</b> |
| <b>NET OPERATING INCOME (before depreciation)</b>            | <b>\$ (399,029)</b>        | <b>\$ 77,124</b>    | <b>\$ 40,421</b>    | <b>\$ 127,287</b>   | <b>\$ 354,783</b>   | <b>\$ 239,051</b>   |
| <b>STUDENT ENROLLMENT</b>                                    |                            |                     |                     |                     |                     |                     |
| Projected Student Enrollment                                 |                            | 306                 | 485                 | 649                 | 696                 | 696                 |
| Revenue Per Pupil  |                            | \$ 7,901            | \$ 7,876            | \$ 7,884            | \$ 7,867            | \$ 7,867            |
| Expenses Per Pupil   |                            | \$ 7,649            | \$ 7,793            | \$ 7,688            | \$ 7,357            | \$ 7,523            |



# New Charter School Application Financial Plan Workbook

## Instructions

### General Instructions and Notes

- **Colors for tabs and cells may be different on MAC computers and Apple products.**
- Complete all four tabs in GREEN. The BLUE tabs are informational only and do not require data entry.
- For MAC users, the BLUE tabs are **Budget, Financial Plan Workbook Summary, SOF, and Payment Formula Example**. All other tabs are GREEN data entry tabs.
- Formula driven cells are locked and should remain locked. Enter information into the GRAY cells ONLY.
- For MAC users, the GRAY cells may appear blue.
- Cells containing RED triangles in the upper right corner contain guidance on that particular line item.
- All **Notes** and **Notes and Descriptions of Assumptions** cells are editable. Adding as much detail as possible in these columns is encouraged. All Notes and Notes and Descriptions of Assumptions should be verifiable with support documents if requested by TEA.

### School Info Tab

- Enter the Lead Applicant's name, email address, and phone number.
- In the row **Start-Up (Year 0) Fiscal Year End**, enter the fiscal year the proposed charter school will be in for its startup year.
- In the row **Year One Fiscal Year End**, enter the fiscal year the school will be in for its first operational year.
- In the row **Fiscal Year End Date**, use the drop-down list box to select the proposed charter school fiscal year end date.
- In the row **Total School Year Minutes**, enter the number of minutes the proposed charter school will be open for operation.

### Enrollment Tab

- **Enter information into the GRAY cells ONLY. All other cells are locked and should remain locked.**

#### ENROLLMENT Section

- Enter the anticipated enrollment for the proposed school by grade and year in the GRAY cells only. The anticipated enrollment for all five years is mandatory because those enrollment assumptions will directly impact the five year budget/operational plan.
- Enter the anticipated average daily attendance (ADA) percentage by year.
- **WARNING** - Enter conservative and realistic enrollment numbers. The state funding for your proposed charter school will be adjusted to your actual ADA, not your budgeted ADA! If you enter ambitious enrollment numbers or your estimated enrollment numbers are not realistic compared to your waiting list of students within commuting distance, then your projections may be invalid. Additionally, your enrollment numbers may change frequently during the school year. Over budgeting revenue is the most frequent cause of financial distress for charter holders.

#### STUDENT POPULATION Section

- Enter the anticipated number of students for each population designation by year in the gray cells only. The numbers entered will automatically generate the percentage of students anticipated for that designation based on the total enrollment entered.

#### TRANSPORATION Section

- Enter the anticipated transportation allotments for the specified programs.

### Personnel Tab

- **Enter information into the GRAY cells ONLY. All other cells are locked and should remain locked.**
- Column C - Enter the position description.
- Column D - Select the category for the position entered in column C from the drop down list box. Categories listed in the drop down box align with the **Start-Up, Y1, & Assumptions** and **Budget** tabs.  
**\*\*PLEASE NOTE\*\* - Before selecting a category, be sure to review the Budget tab to see where each category falls in terms of the Personnel section.**
- Column E - Enter the starting salary for each position.
- Columns F - K - Enter the number of full-time equivalents (FTE) for each position for the given year.
- Column M - Enter any notes related to each position.
- Cells P10 - S10 - Enter the anticipated percentage of salary increases for each year. Salaries for each position for each year will be automatically generated based on the yearly raise percentages entered in the worksheet.

#### Start-Up, Y1, & Assumptions Tab

- Enter information into the GRAY cells ONLY. All other cells are locked and should remain locked.
- Column C - All line descriptions are locked and are to remain locked except those shaded gray and labeled **Custom**. **Custom** cells can be edited by the applicant.
- Columns E - F - Enter budgeted amounts for the proposed charter school in column E for the start-up year (Year 0) and in column F for Year 1.
- Columns H - M - Enter the percentage increase OR decrease that is anticipated for each line item from year to year.  
***\*\* PLEASE NOTE\*\* - The percentages entered in the PAYROLL TAXES AND BENEFITS section are for the percentage of total payroll for that particular year and NOT the percentage of increase from year to year.***
- Enter any notes and descriptions of assumptions that need further explanation.

#### Budget Tab

- ALL revenues and expenses are automatically calculated based on the **Enrollment, Personnel, and Start-Up, Y1, & Assumptions** tabs.
- No data should be entered on this tab.

#### Financial Plan Workbook Summary Tab

- ALL revenues and expenses are automatically calculated based on the **Enrollment, Personnel, and Start-Up, Y1, & Assumptions** tabs.
- No data should be entered on this tab.

#### SOF Tab

- Summary of Finances (**SOF**) tab displays the estimate for Total State Aid.
- No data should be entered on this tab.

#### Payment Formula with Example Tab

- Actual cash flows are based on average attendance for each 6 week period reported to TEA. If you experience a substantial change in enrollment during the year, your ADA will change and so will your payments.
- No data should be entered on this tab.



## Cato Academy - S.Houston/Alvin/Pearland

### NEW CHARTER SCHOOL APPLICATION FINANCIAL PLAN WORKBOOK

|                                    |  |   |
|------------------------------------|--|---|
| Lead Applicant Name:               | Joe Higgins  |   |
| Contact Email:                     | <a href="mailto:joe@joe Higgins inc.com">joe@joe Higgins inc.com</a> |   |
| Contact Phone:                     | 520-631-7400   |   |
| Start-Up (Year 0) Fiscal Year End: | 2021   | <i>Enter the 4-digit year (XXXX)</i>              |
| Year One Fiscal Year End:          | 2022   | <i>Enter the 4-digit year (XXXX)</i>              |
| Fiscal Year End Date:              | June 30  | <i>Select date</i>                                |
| Total School Year Minutes:         | 75,600   | <i>Enter the number of minutes (e.g., 75,600)</i> |

## Cato Academy - S.Houston/Alvin/Pearland

### ESTIMATE OF STATE AID ENTITLEMENT INPUT

**ENROLLMENT**

|   | Year 1        | Year 2        | Year 3        | Year 4        | Year 5        |
|---|---------------|---------------|---------------|---------------|---------------|
|   | 2022          | 2023          | 2024          | 2025          | 2026          |
| Pre-Kindergarten (Enter 1/2 of actual enrollment because you will only be funded for 1/2 day per child) |               |               |               |               |               |
| Kindergarten  | 52.00         | 72.00         | 72.00         | 72.00         | 72.00         |
| 1st Grade   | 52.00         | 72.00         | 72.00         | 78.00         | 78.00         |
| 2nd Grade   | 52.00         | 65.00         | 75.00         | 78.00         | 78.00         |
| 3rd Grade   | 52.00         | 60.00         | 75.00         | 78.00         | 78.00         |
| 4th Grade   | 36.00         | 60.00         | 75.00         | 78.00         | 78.00         |
| 5th Grade   | 36.00         | 52.00         | 75.00         | 78.00         | 78.00         |
| 6th Grade   | 26.00         | 52.00         | 75.00         | 78.00         | 78.00         |
| 7th Grade   |               | 52.00         | 65.00         | 78.00         | 78.00         |
| 8th Grade   |               |               | 65.00         | 78.00         | 78.00         |
| 9th Grade   |               |               |               |               |               |
| 10th Grade  |               |               |               |               |               |
| 11th Grade  |               |               |               |               |               |
| 12th Grade  |               |               |               |               |               |
| <b>Total Number of All Students Enrolled (Average Membership)</b>                                       | <b>306.00</b> | <b>485.00</b> | <b>649.00</b> | <b>696.00</b> | <b>696.00</b> |
| <b>Total Number of High School Students Enrolled</b>  | <b>-</b>      | <b>-</b>      | <b>-</b>      | <b>-</b>      | <b>-</b>      |
| <b>Average Daily Attendance (ADA) %</b>   | <b>95%</b>    | <b>95%</b>    | <b>95%</b>    | <b>95%</b>    | <b>95%</b>    |
| <b>Average Daily Attendance (ADA)</b>   | <b>290.70</b> | <b>460.75</b> | <b>616.55</b> | <b>661.20</b> | <b>661.20</b> |
| Percent change YOY  |               | 58%           | 34%           | 7%            | 0%            |

**STUDENT POPULATION**

|   | Data for the following fiscal years must be based on reasonable estimates and projections. |          |              |          |              |          |              |          |              |          |
|---|--|----------|--------------|----------|--------------|----------|--------------|----------|--------------|----------|
| <b>Special Education Data:</b>                  | 2022   | EYS 2022 | 2023         | EYS 2023 | 2024         | EYS 2024 | 2025         | EYS 2025 | 2026         | EYS 2026 |
| Number Enrolled in Homebound                    | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled in Hospital Class               | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled in Speech Therapy               | 20.00  | -        | 30.00        | -        | 40.00        | -        | 43.00        | -        | 43.00        | -        |
| Number Enrolled in Resource Room                | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled in Self-Contained Mild/Mod/Sev  | 3.00   | -        | 3.00         | -        | 6.00         | -        | 6.00         | -        | 6.00         | -        |
| Number Enrolled in Full-Time Early Childhood    | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled in Off-Home Campus              | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled in VAC                          | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled from State Schools              | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled in Residential Care & Treatment | -  | -        | -            | -        | -            | -        | -            | -        | -            | -        |
| Number Enrolled in Mainstream                   | 7.00   | -        | 13.00        | -        | 18.00        | -        | 18.00        | -        | 18.00        | -        |
| <b>Special Education Student Count (SPED)</b>   | <b>30.00</b>   | <b>-</b> | <b>46.00</b> | <b>-</b> | <b>64.00</b> | <b>-</b> | <b>67.00</b> | <b>-</b> | <b>67.00</b> | <b>-</b> |
| <b>Special Education Student Count %</b>        | <b>9.80%</b>   |          | <b>9.48%</b> |          | <b>9.86%</b> |          | <b>9.63%</b> |          | <b>9.63%</b> |          |
| Percent change YOY                              |  |          | 53%          | 0%       | 39%          | 0%       | 5%           | 0%       | 0%           | 0%       |



| <b>Career and Technology (C&amp;T) Data:</b>     | <b>2022</b> | <b>Advanced C&amp;T<br/>FTE 2022</b> | <b>2023</b> | <b>Advanced C&amp;T<br/>FTE 2023</b> | <b>2024</b> | <b>Advanced C&amp;T<br/>FTE 2024</b> | <b>2025</b> | <b>Advanced C&amp;T<br/>FTE 2025</b> | <b>2026</b> | <b>Advanced C&amp;T<br/>FTE 2026</b> |
|--|-------------|--------------------------------------|-------------|--------------------------------------|-------------|--------------------------------------|-------------|--------------------------------------|-------------|--------------------------------------|
| Number Enrolled in One-hour Class                | -           | -                                    |             |                                      |             |                                      |             |                                      |             |                                      |
| Number Enrolled in Two-hour Class                |             | -                                    |             |                                      |             |                                      |             |                                      |             |                                      |
| Number Enrolled in Three-hour Class              |             | -                                    |             |                                      |             |                                      |             |                                      |             |                                      |
| Number Enrolled in Four-hour Class               |             | -                                    |             |                                      |             |                                      |             |                                      |             |                                      |
| Number Enrolled in Five-hour Class               |             | -                                    |             |                                      |             |                                      |             |                                      |             |                                      |
| Number Enrolled in Six-hour Class                |             | -                                    |             |                                      |             |                                      |             |                                      |             |                                      |
| <b>Career &amp; Technology Students Enrolled</b> | -           | -                                    | -           | -                                    | -           | -                                    | -           | -                                    | -           | -                                    |
| <b>% of Career &amp; Technology Students</b>     |             |                                      |             |                                      |             |                                      |             |                                      |             |                                      |
| Percent change YOY                               |             |                                      | 0%          | 0%                                   | 0%          | 0%                                   | 0%          | 0%                                   | 0%          | 0%                                   |

| <b>Gifted and Talented, Pregnancy Related, &amp;<br/>Bilingual/ESL Data:</b> | <b>Data for the following fiscal years must be based on reasonable estimates and<br/>projections.</b> |             |             |             |             |
|--|---|-------------|-------------|-------------|-------------|
|  | <b>2022</b>   | <b>2023</b> | <b>2024</b> | <b>2025</b> | <b>2026</b> |
| <b>Number Gifted and Talented Students Enrolled</b>                          | 30.00   | 49.00       | 65.00       | 67.00       | 67.00       |
| <b>% of Gifted and Talented Students Enrolled</b>                            | 9.80%   | 10.10%      | 10.02%      | 9.63%       | 9.63%       |
| <b>Number of Pregnancy Related Students</b>                                  |   |             |             |             |             |
| <b>% of Pregnancy Related Students Enrolled</b>                              |   |             |             |             |             |
| <b>Number of Students Enrolled in Bilingual/ESL</b>                          | 30.00   | 49.00       | 65.00       | 69.00       | 69.00       |
| <b>% of Students Enrolled in Bilingual/ESL</b>                               | 9.80%   | 10.10%      | 10.02%      | 9.91%       | 9.91%       |

|  |  |  |  |  |  |
|--|--|--|--|--|--|
| <b>Special Education Error Check</b>     |  |  |  |  |  |
| <b>Career and Technology Error Check</b> |  |  |  |  |  |

|  |  |  |  |  |  |
|--|--|--|--|--|--|
| <b>Compensatory Education Enrollment</b> |  |  |  |  |  |
|--|--|--|--|--|--|

| <b>TRANSPORTATION</b>                                  | <b>2022</b> | <b>2023</b> | <b>2024</b> | <b>2025</b> | <b>2026</b> |
|--|-------------|-------------|-------------|-------------|-------------|
| Regular Program Transportation Allotment               | -           | -           | -           | -           | -           |
| Special Education Program Transportation Allotment     | -           | -           | -           | -           | -           |
| Career and Technology Program Transportation Allotment | -           | -           | -           | -           | -           |
| <b>Transportation Total</b>                            | -           | -           | -           | -           | -           |
| Percent change YOY                                     |             | 0%          | 0%          | 0%          | 0%          |

**Cato Academy - S.Houston/Alvin/Pearland**

## PERSONNEL

[illegible]



## Cato Academy - S.Houston/Alvin/Pearland

### REVENUE AND EXPENSE ASSUMPTIONS

|  | BUDGET                     |                | ASSUMPTIONS  |                |                |                |                |                | Notes and Descriptions of Assumptions<br>for Start-Up Year | Notes and Descriptions of Assumptions<br>for Year 1 through Year 5 |
|--|----------------------------|----------------|--|----------------|----------------|----------------|----------------|----------------|--|--|
|  | Start-Up<br>Year 0<br>2021 | Year 1<br>2022 | Start-Up<br>Year 0<br>2021   | Year 1<br>2022 | Year 2<br>2023 | Year 3<br>2024 | Year 4<br>2025 | Year 5<br>2026 |  |  |
|  |                            |                |  |                |                |                |                |                |  |  |
| Enter the % change below for which the amount entered in column F should change each year. Consider using the % changes in the Enrollment Tab. |                            |                |  |                |                |                |                |                |  |  |
| <b>REVENUE</b>   |                            |                |  |                |                |                |                |                |  |  |
| TOTAL STATE REVENUES   |                            | 2,310,572      |  |                | 58.00%         | 34.00%         | 7.00%          | 0.00%          |  |  |
| TOTAL FEDERAL REVENUES   |                            |                |  |                | 0.00%          | 0.00%          | 0.00%          | 0.00%          |  |  |
| TOTAL LOCAL & OTHER REVENUES   |                            | 107,100        |  |                | 58.00%         | 33.00%         | 7.00%          | 0.00%          | After care - 20% of enrollment - \$175/month               |  |
| TOTAL REVENUE  | \$ -                       | \$ 2,417,672   |  |                |                |                |                |                |  |  |
| <b>EXPENSES</b>  |                            |                |  |                |                |                |                |                |  |  |
| <b>ADMINISTRATIVE STAFF PERSONNEL COSTS</b>  |                            |                |  |                |                |                |                |                |  |  |
| Executive Management   | 24,500                     | 98,000         |  |                |                |                |                |                |  |  |
| Instructional Management   | -                          | 59,000         |  |                |                |                |                |                |  |  |
| Deans, Directors & Coordinators  | -                          | -              |  |                |                |                |                |                |  |  |
| CFO / Director of Finance  | -                          | -              |  |                |                |                |                |                |  |  |
| Operation / Business Manager   | 16,200                     | 91,000         |  |                |                |                |                |                |  |  |
| Administrative Staff   | -                          | -              |  |                |                |                |                |                |  |  |
| Other - Administrative   | -                          | -              |  |                |                |                |                |                |  |  |
| TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS   | \$ 40,700                  | \$ 248,000     |  |                |                |                |                |                |  |  |
| <b>INSTRUCTIONAL PERSONNEL COSTS</b>   |                            |                |  |                |                |                |                |                |  |  |
| Teachers - Regular   | 17,100                     | 798,000        |  |                |                |                |                |                |  |  |
| Teachers - SPED  | -                          | 69,000         |  |                |                |                |                |                |  |  |
| Substitute Teachers  | -                          | -              |  |                |                |                |                |                |  |  |
| Teaching Assistants  | -                          | 46,000         |  |                |                |                |                |                |  |  |
| Specialty Teachers   | -                          | 60,200         |  |                |                |                |                |                |  |  |
| Aides  | -                          | -              |  |                |                |                |                |                |  |  |
| Therapists & Counselors  | -                          | -              |  |                |                |                |                |                |  |  |
| Other - Instructional  | -                          | -              |  |                |                |                |                |                |  |  |
| TOTAL INSTRUCTIONAL PERSONNEL COSTS  | \$ 17,100                  | \$ 973,200     |  |                |                |                |                |                |  |  |
| <b>NON-INSTRUCTIONAL PERSONNEL COSTS</b>   |                            |                |  |                |                |                |                |                |  |  |
| Nurse  | -                          | 24,000         |  |                |                |                |                |                |  |  |
| Librarian  | -                          | -              |  |                |                |                |                |                |  |  |
| Custodian  | -                          | 76,000         |  |                |                |                |                |                |  |  |
| Security   | -                          | -              |  |                |                |                |                |                |  |  |
| Other - Non-Instructional  | -                          | 22,000         |  |                |                |                |                |                |  |  |
| TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS  | \$ -                       | \$ 122,000     |  |                |                |                |                |                |  |  |
| <b>TOTAL PERSONNEL EXPENSES</b>  | \$ 57,800                  | \$ 1,343,200   |  |                |                |                |                |                |  |  |
| <b>PAYROLL TAXES AND BENEFITS</b>  |                            |                | For each line item in the Payroll Taxes and Benefits section, enter the % of Total Personnel Expenses that line item should represent. |                |                |                |                |                |  |  |
| Social Security  | -                          | 83,278         | 0.00%  | 6.20%          | 6.20%          | 6.20%          | 6.20%          | 6.20%          | Federal defined as 6.2%                                    |  |
| Medicare   | -                          | 19,476         | 0.00%  | 1.45%          | 1.45%          | 1.45%          | 1.45%          | 1.45%          | Federal defined as 1.45%                                   |  |
| State Unemployment   | -                          | 16,790         | 0.00%  | 1.25%          | 1.25%          | 1.25%          | 1.25%          | 1.25%          | State Unemployment est 2.7%                                |  |
| Worker's Compensation Insurance  | -                          | 672            | 0.00%  | 0.05%          | 5.00%          | 5.00%          | 5.00%          | 5.00%          | State Workers Comp - Disability - .5%                      |  |
| Custom Other Tax #1  | -                          | -              | 0.00%  | 0.00%          | 0.00%          | 0.00%          | 0.00%          | 0.00%          |  |  |
| Custom Other Tax #2  | -                          | -              | 0.00%  | 0.00%          | 0.00%          | 0.00%          | 0.00%          | 0.00%          |  |  |
| Health Insurance   | -                          | 80,592         | 0.00%  | 6.00%          | 6.00%          | 6.00%          | 6.00%          | 6.00%          | \$3840 annually (\$320 monthly) - 80% participation rate - |  |
| Dental Insurance   | -                          | 13,432         | 0.00%  | 1.00%          | 0.00%          | 0.00%          | 0.00%          | 0.00%          | \$800 annual - 80% participation rate -                    |  |
| Vision Insurance   | -                          | -              | 0.00%  | 0.00%          | 0.00%          | 0.00%          | 0.00%          | 0.00%          |  |  |
| Life Insurance   | -                          | -              | 0.00%  | 0.00%          | 0.00%          | 0.00%          | 0.00%          | 0.00%          |  |  |
| Retirement Contribution  | -                          | 53,728         | 0.00%  | 4.00%          | 4.00%          | 4.00%          | 4.00%          | 4.00%          | 4% 401k match - 80% participation -                        |  |
| Custom Fringe #1   | -                          | -              | 0.00%  | 0.00%          | 0.00%          | 0.00%          | 0.00%          | 0.00%          |  |  |
| Custom Fringe #2   | 838                        | -              | 1.45%  | 0.00%          | 0.00%          | 0.00%          | 0.00%          | 0.00%          |  |  |
| TOTAL PAYROLL TAXES AND BENEFITS   | \$ 838                     | \$ 267,968     |  |                |                |                |                |                |  |  |
| <b>TOTAL PERSONNEL, TAX &amp; BENEFIT EXPENSES</b>   | \$ 58,638                  | \$ 1,611,168   |  |                |                |                |                |                |  |  |

## Cato Academy - S.Houston/Alvin/Pearland

### REVENUE AND EXPENSE ASSUMPTIONS

|  | BUDGET             |            | ASSUMPTIONS   |            |          |        |        |        | Notes and Descriptions of Assumptions<br>for Start-Up Year  | Notes and Descriptions of Assumptions<br>for Year 1 through Year 5 |
|--|--------------------|------------|---|------------|----------|--------|--------|--------|---|--|
|  | Start-Up<br>Year 0 | Year 1     | Start-Up<br>Year 0  | Year 1     | Year 2   | Year 3 | Year 4 | Year 5 |   |  |
|  | 2021               | 2022       | 2021  | 2022       | 2023     | 2024   | 2025   | 2026   |   |  |
|  |                    |            | Enter the % change below for which the amount entered in<br>column F should change each year. |            |          |        |        |        |   |  |
| CONTRACTED SERVICES                              |                    |            |   |            |          |        |        |        |   |  |
| Accounting / Audit                               | -                  | 46,000     |   |            | 3.00%    | 3.00%  | 3.00%  | 3.00%  | Includes \$10k audit and monthly CPA/Acct services  |  |
| Legal  | -                  | 5,500      |   |            | 3.00%    | 3.00%  | 3.00%  | 3.00%  | Not applicable  |  |
| Management Company Fee                           | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  | Included in Personnel   |  |
| Nurse Services                                   | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  | Emergency lunch service scholars (vendor bills families for lunch service or brown bag)   |  |
| Food Service / School Lunch                      | -                  | 6,000      |   |            | 40.00%   | 30.00% | 5.00%  | 5.00%  | Special Education Vendors - \$65k y1, \$95k y2, \$130k y3. Increase in house SPED team from 1 to 2 in Y3  |  |
| Payroll Services                                 | -                  | 22,750     |   |            | 46.29%   | 29.70% | 5.10%  | 3.30%  |   |  |
| Special Ed Services                              | -                  | 65,000     |   |            | 30.70%   | 36.00% | 0.00%  | 0.00%  | Beginning Y2 (\$10k teacher stipend, \$17k coaches, \$3k bonus)   |  |
| Titlment Services (i.e. Title I)                 | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |
| Substitute Teacher Fund                          | -                  | 14,820     |   |            | 47.00%   | 25.00% | 0.00%  | 0.00%  |   |  |
| Stipends (Coaches, Master Teacher, Bonus)        | -                  | 1,000      |   |            | 2900.00% | 0.00%  | 0.00%  | 0.00%  |   |  |
| Custom Contracted Services #3                    | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |
| TOTAL  | \$                 | \$ 161,070 |   |            |          |        |        |        |   |  |
|  |                    |            |   |            |          |        |        |        |   |  |
| SCHOOL OPERATIONS                                |                    |            |   |            |          |        |        |        |   |  |
| Board Expenses                                   | -                  | 1,000      |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |
| Classroom / Teaching Supplies & Materials        | -                  | 8,000      |   |            | 50.00%   | 25.00% | 10.00% | 10.00% | \$500 per classroom (inc intervention, ELL, Sped)   |  |
| Special Ed Supplies & Materials                  | -                  | 5,500      |   |            | 50.00%   | 25.00% | 10.00% | 10.00% | Digital subscriptions - ELL, Sped, Intervention (Edmentum, Fundations)  |  |
| Textbooks / Workbooks                            | 148,985            | 5,500      |   |            | 530.00%  | 40.00% | 7.50%  | 0.00%  | Schoology LMS license only Y1 (Start Up included curriculum initial order for Y1) Refills Y2 and beyond. Estimate \$75 per scholar \$35k y2, \$49k y3, \$53 y4,5. |  |
| Supplies & Materials other                       | -                  | 3,060      |   |            | 58.00%   | 33.00% | 7.00%  | 0.00%  | Included in Y0 start up package   |  |
| Equipment / Furniture                            | 59,119             | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  | Telco only - see internet services below  |  |
| Telephone  | -                  | 1,250      |   |            | 2.00%    | 2.00%  | 2.00%  | 2.00%  | Capital Expense - Y0 (chromebook bank of 125)   |  |
| Technology                                       | 25,887             | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  | NWEA-Map \$12 pp (1st to 8th)   |  |
| Student Testing & Assessment                     | -                  | 3,672      |   |            | 26.00%   | 48.00% | 26.00% | 0.00%  | Est Field Trip  |  |
| Field Trips                                      | -                  | 7,650      |   |            | 58.00%   | 33.80% | 7.20%  | 0.00%  | Assuming no IEP/504 scholars need transportation  |  |
| Transportation (student)                         | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |
| Student Services - other                         | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |
| Office Expense                                   | 36,400             | 3,060      |   |            | 58.00%   | 33.00% | 7.00%  | 0.00%  |   |  |
| Staff Development                                | -                  | 12,000     |   |            | 10.00%   | 10.00% | 10.00% | 10.00% | PD outside services - Conferences   |  |
| Staff Recruitment                                | -                  | 1,000      |   |            | 550.00%  | 0.00%  | 0.00%  | 0.00%  | y1 included in marketing start up - \$6500 annual   |  |
| Student Recruitment / Marketing                  | 70,000             | 18,915     |   |            | 33.00%   | 7.00%  | 0.00%  | 0.00%  | y0 launch. Y1-5 expansion -   |  |
| School Meals / Lunch                             | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  | Conferences - PD related  |  |
| Travel (Staff)                                   | -                  | 12,000     |   |            | 10.00%   | 10.00% | 10.00% | 10.00% | 2 part time staff members expanding to 5 - part time  |  |
| Fundraising                                      | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  | \$6k y1, \$9k y2, 12k y3-5 - Training, travel, memberships  |  |
| After School Program                             | -                  | 32,000     |   |            | 58.00%   | 33.00% | 7.00%  | 0.00%  | Business management and financial oversight done by approved Texas based third party vendor with background in charter school management.                         |  |
| Membership and Dues (Staff                       | -                  | 6,000      |   |            | 33.00%   | 25.00% | 0.00%  | 0.00%  |   |  |
| Contracted Business Services - Accounting Review | -                  | 12,000     |   |            | 3.00%    | 3.00%  | 3.00%  | 3.00%  |   |  |
| TOTAL SCHOOL OPERATIONS                          | \$                 | \$ 340,391 | \$  | \$ 132,607 |          |        |        |        |   |  |
|  |                    |            |   |            |          |        |        |        |   |  |
| FACILITY OPERATION & MAINTENANCE                 |                    |            |   |            |          |        |        |        |   |  |
| Insurance  | -                  | 39,168     |   |            | 58.00%   | 33.00% | 7.00%  | 0.00%  | Based on enrollment   |  |
| Janitorial Services                              | -                  | 12,000     |   |            | 2.00%    | 2.00%  | 2.00%  | 2.00%  | Custodial In House (supplies and landscape)   |  |
| Building and Land Rent / Lease                   | -                  | 321,475    |   |            | 140.00%  | 17.50% | 0.00%  | 0.00%  |   |  |
| Repairs & Maintenance                            | -                  | 3,060      |   |            | 60.00%   | 30.00% | 0.00%  | 0.00%  |   |  |
| Security Services                                | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |
| Utilities  | -                  | 50,000     |   |            | 2.00%    | 2.00%  | 2.00%  | 2.00%  | Gas, Elecctric, Sewer, Disposal   |  |
| Internet   | -                  | 10,000     |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |
| Custom Facilities Operations #1                  | -                  | -          |   |            | 0.00%    | 0.00%  | 0.00%  | 0.00%  |   |  |



**Cato Academy - S.Houston/Alvin/Pearland**  
REVENUE AND EXPENSE ASSUMPTIONS

|   | BUDGET             |              | ASSUMPTIONS        |        |        |        |        |        | Notes and Descriptions of Assumptions<br>for Start-Up Year | Notes and Descriptions of Assumptions<br>for Year 1 through Year 5 |
|---|--------------------|--------------|--------------------|--------|--------|--------|--------|--------|--|--|
|   | Start-Up<br>Year 0 | Year 1       | Start-Up<br>Year 0 | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |  |  |
|   | 2021               | 2022         | 2021               | 2022   | 2023   | 2024   | 2025   | 2026   |  |  |
| Custom Facilities Operations #2               | -                  | -            |                    |        | 0.00%  | 0.00%  | 0.00%  | 0.00%  |  |  |
| TOTAL FACILITY OPERATION & MAINTENANCE        | \$ -               | \$ 435,703   |                    |        |        |        |        |        |  |  |
| RESERVES / CONTINGENCIES                      | -                  | -            |                    |        | 0.00%  | 0.00%  | 0.00%  | 0.00%  |  |  |
| TOTAL EXPENSES                                | \$ 399,029         | \$ 2,340,548 |                    |        |        |        |        |        |  |  |
| NET OPERATING INCOME (before Depreciation)    | \$ (399,029)       | \$ 77,124    |                    |        |        |        |        |        |  |  |
| DEPRECIATION & AMORTIZATION                   | -                  | -            |                    |        | 0.00%  | 0.00%  | 0.00%  | 0.00%  |  |  |
| NET OPERATING INCOME (including Depreciation) | \$ (399,029)       | \$ 77,124    |                    |        |        |        |        |        |  |  |

## Cato Academy - S.Houston/Alvin/Pearland

### PROJECTED BUDGET / OPERATING PLAN

**SUMMARY**

|  | Start-Up<br>Year 0 | Year 1    | Year 2    | Year 3    | Year 4    | Year 5    |
|--|--------------------|-----------|-----------|-----------|-----------|-----------|
|  | 2021               | 2022      | 2023      | 2024      | 2025      | 2026      |
| Total Revenue                              | -                  | 2,417,672 | 3,819,922 | 5,117,003 | 5,475,193 | 5,475,193 |
| Total Expenses                             | 399,029            | 2,340,548 | 3,779,500 | 4,989,716 | 5,120,410 | 5,236,142 |
| Net Operating Income (before Depreciation) | (399,029)          | 77,124    | 40,421    | 127,287   | 354,783   | 239,051   |
| Revenue Per Pupil                          |                    | 7,900.89  | 7,876.13  | 7,884.44  | 7,866.66  | 7,866.66  |
| Expenses Per Pupil                         |                    | 7,648.85  | 7,792.78  | 7,688.31  | 7,356.91  | 7,523.19  |

**REVENUE**

|                              |             |                     |                     |                     |                     |                     |
|------------------------------|-------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| TOTAL STATE REVENUES         |             | 2,310,572           | 3,650,704           | 4,891,943           | 5,234,379           | 5,234,379           |
| TOTAL FEDERAL REVENUES       |             | -                   | -                   | -                   | -                   | -                   |
| TOTAL LOCAL & OTHER REVENUES | \$ -        | 107,100             | 169,218             | 225,060             | 240,814             | 240,814             |
| <b>TOTAL REVENUE</b>         | <b>\$ -</b> | <b>\$ 2,417,672</b> | <b>\$ 3,819,922</b> | <b>\$ 5,117,003</b> | <b>\$ 5,475,193</b> | <b>\$ 5,475,193</b> |

**EXPENSES****ADMINISTRATIVE STAFF PERSONNEL COSTS**

|   |                  |                   |                   |                   |                   |                   |
|---|------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Executive Management                              | 24,500           | 98,000            | 100,940           | 103,968           | 107,087           | 110,300           |
| Instructional Management                          | -                | 59,000            | 60,770            | 62,593            | 64,471            | 66,405            |
| Deans, Directors & Coordinators                   | -                | -                 | -                 | -                 | -                 | -                 |
| CFO / Director of Finance                         | -                | -                 | -                 | -                 | -                 | -                 |
| Operation / Business Manager                      | 16,200           | 91,000            | 93,730            | 96,542            | 99,438            | 102,421           |
| Administrative Staff                              | -                | -                 | 71,070            | 73,202            | 75,398            | 77,660            |
| Other - Administrative                            | -                | -                 | -                 | -                 | -                 | -                 |
| <b>TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS</b> | <b>\$ 40,700</b> | <b>\$ 248,000</b> | <b>\$ 326,510</b> | <b>\$ 336,305</b> | <b>\$ 346,394</b> | <b>\$ 356,786</b> |

**INSTRUCTIONAL PERSONNEL COSTS**

|  |                  |                   |                     |                     |                     |                     |
|--|------------------|-------------------|---------------------|---------------------|---------------------|---------------------|
| Teachers - Regular                         | 17,100           | 798,000           | 1,291,620           | 1,814,139           | 1,868,563           | 1,924,620           |
| Teachers - SPED                            | -                | 69,000            | 71,070              | 146,404             | 150,796             | 155,320             |
| Substitute Teachers                        | -                | -                 | -                   | -                   | -                   | -                   |
| Teaching Assistants                        | -                | 46,000            | 47,380              | 97,603              | 100,531             | 103,547             |
| Specialty Teachers                         | -                | 60,200            | 94,142              | 127,732             | 131,564             | 135,511             |
| Aides                                      | -                | -                 | -                   | -                   | -                   | -                   |
| Therapists & Counselors                    | -                | -                 | -                   | -                   | -                   | -                   |
| Other - Instructional                      | -                | -                 | -                   | -                   | -                   | -                   |
| <b>TOTAL INSTRUCTIONAL PERSONNEL COSTS</b> | <b>\$ 17,100</b> | <b>\$ 973,200</b> | <b>\$ 1,504,212</b> | <b>\$ 2,185,878</b> | <b>\$ 2,251,455</b> | <b>\$ 2,318,998</b> |

**NON-INSTRUCTIONAL PERSONNEL COSTS**

|  |                  |                     |                     |                     |                     |                     |
|--|------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Nurse  | -                | 24,000              | 24,720              | 50,923              | 52,451              | 54,024              |
| Librarian                                      | -                | -                   | -                   | -                   | -                   | -                   |
| Custodian                                      | -                | 76,000              | 78,280              | 120,943             | 124,571             | 128,308             |
| Security                                       | -                | -                   | -                   | -                   | -                   | -                   |
| Other - Non-Instructional                      | -                | 22,000              | 22,660              | 29,175              | 30,050              | 30,951              |
| <b>TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS</b> | <b>\$ -</b>      | <b>\$ 122,000</b>   | <b>\$ 125,660</b>   | <b>\$ 201,041</b>   | <b>\$ 207,072</b>   | <b>\$ 213,284</b>   |
| <b>TOTAL PERSONNEL EXPENSES</b>                | <b>\$ 57,800</b> | <b>\$ 1,343,200</b> | <b>\$ 1,956,382</b> | <b>\$ 2,723,224</b> | <b>\$ 2,804,921</b> | <b>\$ 2,889,069</b> |



|  | Start-Up<br>Year 0<br>2021 | Year 1<br>2022      | Year 2<br>2023      | Year 3<br>2024      | Year 4<br>2025      | Year 5<br>2026      |
|--|----------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| <b>PAYROLL TAXES AND BENEFITS</b>                  |                            |                     |                     |                     |                     |                     |
| Social Security                                    | -                          | 83,278              | 121,296             | 168,840             | 173,905             | 179,122             |
| Medicare   | -                          | 19,476              | 28,368              | 39,487              | 40,671              | 41,891              |
| State Unemployment                                 | -                          | 16,790              | 24,455              | 34,040              | 35,062              | 36,113              |
| Worker's Compensation Insurance                    | -                          | 672                 | 97,819              | 136,161             | 140,246             | 144,453             |
| Custom Other Tax #1                                | -                          | -                   | -                   | -                   | -                   | -                   |
| Custom Other Tax #2                                | -                          | -                   | -                   | -                   | -                   | -                   |
| Health Insurance                                   | -                          | 80,592              | 117,383             | 163,393             | 168,295             | 173,344             |
| Dental Insurance                                   | -                          | 13,432              | -                   | -                   | -                   | -                   |
| Vision Insurance                                   | -                          | -                   | -                   | -                   | -                   | -                   |
| Life Insurance                                     | -                          | -                   | -                   | -                   | -                   | -                   |
| Retirement Contribution                            | -                          | 53,728              | 78,255              | 108,929             | 112,197             | 115,563             |
| Custom Fringe #1                                   | -                          | -                   | -                   | -                   | -                   | -                   |
| Custom Fringe #2                                   | 838                        | -                   | -                   | -                   | -                   | -                   |
| <b>TOTAL PAYROLL TAXES AND BENEFITS</b>            | <b>\$ 838</b>              | <b>\$ 267,968</b>   | <b>\$ 467,575</b>   | <b>\$ 650,851</b>   | <b>\$ 670,376</b>   | <b>\$ 690,487</b>   |
| <b>TOTAL PERSONNEL, TAX &amp; BENEFIT EXPENSES</b> | <b>\$ 58,638</b>           | <b>\$ 1,611,168</b> | <b>\$ 2,423,957</b> | <b>\$ 3,374,075</b> | <b>\$ 3,475,297</b> | <b>\$ 3,579,556</b> |
| <b>CONTRACTED SERVICES</b>                         |                            |                     |                     |                     |                     |                     |
| Accounting / Audit                                 | -                          | 46,000              | 47,380              | 48,801              | 50,265              | 51,773              |
| Legal  | -                          | 5,500               | 5,665               | 5,835               | 6,010               | 6,190               |
| Management Company Fee                             | -                          | -                   | -                   | -                   | -                   | -                   |
| Nurse Services                                     | -                          | -                   | -                   | -                   | -                   | -                   |
| Food Service / School Lunch                        | -                          | 6,000               | 8,400               | 10,920              | 11,466              | 12,039              |
| Payroll Services                                   | -                          | 22,750              | 33,281              | 43,165              | 45,367              | 46,864              |
| Special Ed Services                                | -                          | 65,000              | 84,955              | 115,539             | 115,539             | 115,539             |
| Titlement Services (i.e. Title I)                  | -                          | -                   | -                   | -                   | -                   | -                   |
| Substitute Teacher Fund                            | -                          | 14,820              | 21,785              | 27,232              | 27,232              | 27,232              |
| Stipends (Coaches, Master Teacher, Bonus)          | -                          | 1,000               | 30,000              | 30,000              | 30,000              | 30,000              |
| Custom Contracted Services #3                      | -                          | -                   | -                   | -                   | -                   | -                   |
| <b>TOTAL</b>                                       | <b>\$ -</b>                | <b>\$ 161,070</b>   | <b>\$ 231,466</b>   | <b>\$ 281,492</b>   | <b>\$ 285,879</b>   | <b>\$ 289,638</b>   |

|  | Start-Up<br>Year 0<br>2021 | Year 1<br>2022      | Year 2<br>2023      | Year 3<br>2024      | Year 4<br>2025      | Year 5<br>2026      |
|--|----------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| <b>SCHOOL OPERATIONS</b>                             |                            |                     |                     |                     |                     |                     |
| Board Expenses                                       | -                          | 1,000               | 1,000               | 1,000               | 1,000               | 1,000               |
| Classroom / Teaching Supplies & Materials            | -                          | 8,000               | 12,000              | 15,000              | 16,500              | 18,150              |
| Special Ed Supplies & Materials                      | -                          | 5,500               | 8,250               | 10,313              | 11,344              | 12,478              |
| Textbooks / Workbooks                                | 148,985                    | 5,500               | 34,650              | 48,510              | 52,148              | 52,148              |
| Supplies & Materials other                           | -                          | 3,060               | 4,835               | 6,430               | 6,880               | 6,880               |
| Equipment / Furniture                                | 59,119                     | -                   | -                   | -                   | -                   | -                   |
| Telephone  | -                          | 1,250               | 1,275               | 1,301               | 1,327               | 1,353               |
| Technology   | 25,887                     | -                   | -                   | -                   | -                   | -                   |
| Student Testing & Assessment                         | -                          | 3,672               | 4,627               | 6,848               | 8,628               | 8,628               |
| Field Trips  | -                          | 7,650               | 12,087              | 16,172              | 17,337              | 17,337              |
| Transportation (student)                             | -                          | -                   | -                   | -                   | -                   | -                   |
| Student Services - other                             | -                          | -                   | -                   | -                   | -                   | -                   |
| Office Expense                                       | 36,400                     | 3,060               | 4,835               | 6,430               | 6,880               | 6,880               |
| Staff Development                                    | -                          | 12,000              | 13,200              | 14,520              | 15,972              | 17,569              |
| Staff Recruitment                                    | -                          | 1,000               | 6,500               | 6,500               | 6,500               | 6,500               |
| Student Recruitment / Marketing                      | 70,000                     | 18,915              | 25,157              | 26,918              | 26,918              | 26,918              |
| School Meals / Lunch                                 | -                          | -                   | -                   | -                   | -                   | -                   |
| Travel (Staff)                                       | -                          | 12,000              | 13,200              | 14,520              | 15,972              | 17,569              |
| Fundraising  | -                          | -                   | -                   | -                   | -                   | -                   |
| After School Program                                 | -                          | 32,000              | 50,560              | 67,245              | 71,952              | 71,952              |
| Membership and Dues (Staff)                          | -                          | 6,000               | 7,980               | 9,975               | 9,975               | 9,975               |
| Contracted Business Services - Accounting Review     | -                          | 12,000              | 12,360              | 12,731              | 13,113              | 13,506              |
| <b>TOTAL SCHOOL OPERATIONS</b>                       | <b>\$ 340,391</b>          | <b>\$ 132,607</b>   | <b>\$ 212,515</b>   | <b>\$ 264,412</b>   | <b>\$ 282,446</b>   | <b>\$ 288,844</b>   |
| <b>FACILITY OPERATION &amp; MAINTENANCE</b>          |                            |                     |                     |                     |                     |                     |
| Insurance  | -                          | 39,168              | 61,885              | 82,308              | 88,069              | 88,069              |
| Janitorial Services                                  | -                          | 12,000              | 12,240              | 12,485              | 12,734              | 12,989              |
| Building and Land Rent / Lease                       | -                          | 321,475             | 771,540             | 906,560             | 906,560             | 906,560             |
| Repairs & Maintenance                                | -                          | 3,060               | 4,896               | 6,365               | 6,365               | 6,365               |
| Security Services                                    | -                          | -                   | -                   | -                   | -                   | -                   |
| Utilities  | -                          | 50,000              | 51,000              | 52,020              | 53,060              | 54,122              |
| Internet   | -                          | 10,000              | 10,000              | 10,000              | 10,000              | 10,000              |
| Custom Facilities Operations #1                      | -                          | -                   | -                   | -                   | -                   | -                   |
| Custom Facilities Operations #2                      | -                          | -                   | -                   | -                   | -                   | -                   |
| <b>TOTAL FACILITY OPERATION &amp; MAINTENANCE</b>    | <b>\$ -</b>                | <b>\$ 435,703</b>   | <b>\$ 911,561</b>   | <b>\$ 1,069,737</b> | <b>\$ 1,076,788</b> | <b>\$ 1,078,104</b> |
| <b>RESERVES / CONTINGENCIES</b>                      | -                          | -                   | -                   | -                   | -                   | -                   |
| <b>TOTAL EXPENSES</b>                                | <b>\$ 399,029</b>          | <b>\$ 2,340,548</b> | <b>\$ 3,779,500</b> | <b>\$ 4,989,716</b> | <b>\$ 5,120,410</b> | <b>\$ 5,236,142</b> |
| <b>NET OPERATING INCOME (before Depreciation)</b>    | <b>\$ (399,029)</b>        | <b>\$ 77,124</b>    | <b>\$ 40,421</b>    | <b>\$ 127,287</b>   | <b>\$ 354,783</b>   | <b>\$ 239,051</b>   |
| <b>DEPRECIATION &amp; AMORTIZATION</b>               | -                          | -                   | -                   | -                   | -                   | -                   |
| <b>NET OPERATING INCOME (including Depreciation)</b> | <b>\$ (399,029)</b>        | <b>\$ 77,124</b>    | <b>\$ 40,421</b>    | <b>\$ 127,287</b>   | <b>\$ 354,783</b>   | <b>\$ 239,051</b>   |



## Cato Academy - S.Houston/Alvin/Pearland

### FINANCIAL PLAN WORKBOOK SUMMARY

| Start-Up<br>Year 0 | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--------------------|--------|--------|--------|--------|--------|
| 2021               | 2022   | 2023   | 2024   | 2025   | 2026   |

**REVENUE**

Total State Revenue  
Total Federal Revenue  
Total Local and Other Revenue

|             |                     |                     |                     |                     |                     |
|-------------|---------------------|---------------------|---------------------|---------------------|---------------------|
|             | \$ 2,310,572        | \$ 3,650,704        | \$ 4,891,943        | \$ 5,234,379        | \$ 5,234,379        |
|             | \$ -                | \$ -                | \$ -                | \$ -                | \$ -                |
| \$ -        | \$ 107,100          | \$ 169,218          | \$ 225,060          | \$ 240,814          | \$ 240,814          |
| <b>\$ -</b> | <b>\$ 2,417,672</b> | <b>\$ 3,819,922</b> | <b>\$ 5,117,003</b> | <b>\$ 5,475,193</b> | <b>\$ 5,475,193</b> |

**TOTAL REVENUE****EXPENSES****PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES**

Total Administrative Staff Personnel Costs  
Total Instructional Personnel Costs  
Total Non-Instructional Personnel Costs  
Total Payroll Taxes and Benefits

|                  |                     |                     |                     |                     |                     |
|------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| \$ 40,700        | \$ 248,000          | \$ 326,510          | \$ 336,305          | \$ 346,394          | \$ 356,786          |
| \$ 17,100        | \$ 973,200          | \$ 1,504,212        | \$ 2,185,878        | \$ 2,251,455        | \$ 2,318,998        |
| \$ -             | \$ 122,000          | \$ 125,660          | \$ 201,041          | \$ 207,072          | \$ 213,284          |
| \$ 838           | \$ 267,968          | \$ 467,575          | \$ 650,851          | \$ 670,376          | \$ 690,487          |
| <b>\$ 58,638</b> | <b>\$ 1,611,168</b> | <b>\$ 2,423,957</b> | <b>\$ 3,374,075</b> | <b>\$ 3,475,297</b> | <b>\$ 3,579,556</b> |

**TOTAL PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES****NON-PAYROLL RELATED EXPENSES**

Total Contracted Services  
Total School Operations  
Total Facilities Operations and Maintenance  
Reserves / Contingencies

|                   |                   |                     |                     |                     |                     |
|-------------------|-------------------|---------------------|---------------------|---------------------|---------------------|
| \$ -              | \$ 161,070        | \$ 231,466          | \$ 281,492          | \$ 285,879          | \$ 289,638          |
| \$ 340,391        | \$ 132,607        | \$ 212,515          | \$ 264,412          | \$ 282,446          | \$ 288,844          |
| \$ -              | \$ 435,703        | \$ 911,561          | \$ 1,069,737        | \$ 1,076,788        | \$ 1,078,104        |
| \$ -              | \$ -              | \$ -                | \$ -                | \$ -                | \$ -                |
| <b>\$ 340,391</b> | <b>\$ 729,380</b> | <b>\$ 1,355,543</b> | <b>\$ 1,615,641</b> | <b>\$ 1,645,113</b> | <b>\$ 1,656,586</b> |

**TOTAL NON-PAYROLL RELATED EXPENSES****TOTAL EXPENSES**

|                   |                     |                     |                     |                     |                     |
|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| <b>\$ 399,029</b> | <b>\$ 2,340,548</b> | <b>\$ 3,779,500</b> | <b>\$ 4,989,716</b> | <b>\$ 5,120,410</b> | <b>\$ 5,236,142</b> |
|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|

**NET OPERATING INCOME (before depreciation)**

|                     |                  |                  |                   |                   |                   |
|---------------------|------------------|------------------|-------------------|-------------------|-------------------|
| <b>\$ (399,029)</b> | <b>\$ 77,124</b> | <b>\$ 40,421</b> | <b>\$ 127,287</b> | <b>\$ 354,783</b> | <b>\$ 239,051</b> |
|---------------------|------------------|------------------|-------------------|-------------------|-------------------|

**STUDENT ENROLLMENT**

Projected Student Enrollment  
Revenue Per Pupil  
Expenses Per Pupil

|  |          |          |          |          |          |
|--|----------|----------|----------|----------|----------|
|  | 306      | 485      | 649      | 696      | 696      |
|  | \$ 7,901 | \$ 7,876 | \$ 7,884 | \$ 7,867 | \$ 7,867 |
|  | \$ 7,649 | \$ 7,793 | \$ 7,688 | \$ 7,357 | \$ 7,523 |

## Cato Academy - S.Houston/Alvin/Pearland

### ESTIMATE OF STATE AID ENTITLEMENT

| Summary of Finance Description                                | Weight or Rate |                |
|---|----------------|----------------|
| Refined Average Daily Attendance (ADA)                        |                | 290.700        |
| High School ADA   | \$ 275         | 0.000          |
| Prior Year Refined ADA  |                | 0.000          |
| <b>SPECIAL EDUCATION FTE</b>                                  |                |                |
| Homebound (Code 01)   | 5.0            | 0.000          |
| Hospital Class (Code 02)                                      | 3.0            | 0.000          |
| Speech Therapy (Code 00)                                      | 5.0            | 0.792          |
| Resource Room (Code 41& 42)                                   | 3.0            | 0.000          |
| Self-contained Mild/Mod/Severe (Code 43 & 44)                 | 3.0            | 1.358          |
| Full Time Early Childhood (Code 45)                           | 3.0            | 0.000          |
| Off-home Campus (Codes 91-98)                                 | 2.7            | 0.000          |
| VAC (Code 08)   | 2.3            | 0.000          |
| State School Students (Code 30)                               | 2.8            | 0.000          |
| Residential Care & Treatment (Code 81-89)                     | 4.0            | 0.000          |
| Total Special Education FTE                                   |                | 2.150          |
| Total Special Education Weighted FTE                          |                | 8.032          |
| <b>EXTENDED YEAR SERVICES (EYS) SPECIAL EDUCATION FTE</b>     |                |                |
| Homebound (Code 01)   | 5.0            | 0.000          |
| Hospital Class (Code 02)                                      | 3.0            | 0.000          |
| Speech Therapy (Code 00)                                      | 5.0            | 0.000          |
| Resource Room (Code 41& 42)                                   | 3.0            | 0.000          |
| Self-contained Mild/Mod/Severe (Code 43 & 44)                 | 3.0            | 0.000          |
| Full Time Early Childhood (Code 45)                           | 3.0            | 0.000          |
| Off-home Campus (Codes 91-98)                                 | 2.7            | 0.000          |
| VAC (Code 08)   | 2.3            | 0.000          |
| State School Students (Code 30)                               | 2.8            | 0.000          |
| Residential Care & Treatment (Code 81-89)                     | 4.0            | 0.000          |
| Total ESY Special Education FTE                               |                | 0.000          |
| Total ESY Special Education Weighted FTE                      |                | 0.000          |
| Mainstream ADA  | 1.10           | 6.650          |
| Career & Technology FTEs                                      | 1.35           | 0.000          |
| Advanced Career & Technology Education FTEs                   | \$ 50          | 0.000          |
| Regular Program ADA   |                | 288.550        |
| Gifted & Talented Enrollment                                  | 0.12           | 14.535         |
| State Compensatory Education Enrollment                       | 0.20           | 0.000          |
| Pregnancy Related FTEs  | 2.41           | 0.000          |
| Bilingual ADA   | 0.10           | 28.500         |
| Adjusted GYA  |                | 0.9733         |
| <b>Total Weighted Average Daily Attendance (WADA)</b>         | <b>SOF pg</b>  | <b>384.582</b> |
| Did Charter Holder Participate in TRS Active Care in 2005-06? |                | NO             |
| Full-Time Staff (not MSS)                                     | 1              | 0.000          |
| Part-Time Staff (not MSS)                                     | 1              | 0.000          |
| <b>State Average Funding Components</b>                       | <b>SOF pg</b>  |                |
| Per Capita Rate   | 2              | \$ 447.180     |
| District Basic Allotment (DBA)                                | 7              | \$ 5,102.00    |
| Adjusted Basic Allotment (ABA)                                | 7              | \$ 5,390.00    |
| Adjusted Allotment  | 7              | \$ 6,535.00    |
| District Tax Rate Level 1 (DTR1)                              | 12             | \$ 0.057339    |



|   |        |    |           |
|---|--------|----|-----------|
| District Tax Rate Level 2 (DTR2)                                      | 12     | \$ | 0.049003  |
| 2018-2019 State Average I&S Rate that limits spending to \$60 million | 16     | \$ | 0.060035  |
| EDA Guaranteed Yield (GY)   | 16     | \$ | 37.00     |
| Level 1 Entitlement   | 12     | \$ | 106.28    |
| Level 2 Entitlement   | 12     | \$ | 31.95     |
| <b>Program Intent Codes -TIER I Allotments</b>                        | SOF pg |    |           |
| 11-Regular Program Allotment  | 2      | \$ | 1,885,676 |
| 21-Gifted & Talented Adjusted Allotment (spend 55% of amount)         | 2      | \$ | 11,398    |
| 25-Bilingual Education Allotment (spend 52% of amount)                | 2      | \$ | 18,625    |
| 99-New Instructional Facility Allotment                               | 2      | \$ | -         |
| 31-High School Allotment (spend 100% of amount)                       | 2      | \$ | -         |
| <b>Special Education Detail:</b>                                      | SOF pg |    |           |
| Regular Special Education   | 10     | \$ | 52,492    |
| Mainstream  | 10     | \$ | 47,804    |
| Residential Care and Treatment  | 10     | \$ | -         |
| State Schools   | 10     | \$ | -         |
| Extended Year Special Education                                       | 10     | \$ | -         |
| <b>23-Special Education Adjusted Allotment (spend 52% of amount)</b>  |        | \$ | 100,295   |
| <b>Career &amp; Technology Detail:</b>                                | SOF pg |    |           |
| Regular Career & Technology (CTE) Allotment                           | 10     | \$ | -         |
| Advanced CTE Allotment  | 10     | \$ | -         |
| <b>22-Career and Technology Allotment (spend 58% of amount)</b>       | 2      | \$ | -         |
| <b>State Compensatory Education Detail:</b>                           | SOF pg |    |           |
| State Compensatory Allotment  | 11     | \$ | -         |
| Pregnancy Related   | 11     | \$ | -         |
| <b>24-Compensatory Education Allotment (spend 52% of amount)</b>      | 2      | \$ | -         |
| <b>Transportation Detail:</b>   | SOF pg |    |           |
| Regular   | 9      | \$ | -         |
| Special Education   | 9      | \$ | -         |
| Career & Technology Education   | 9      | \$ | -         |
| <b>99-Transportation Allotment</b>                                    | 2      | \$ | -         |
| <b>TOTAL COST OF TIER I / STATE SHARE OF TIER I</b>                   | 2      | \$ | 2,015,995 |
| <b>TIER II</b>  | SOF pg |    |           |
| Tier II Level 1   | 12     | \$ | 234,365   |
| Tier II Level 2   | 12     | \$ | 60,212    |
| <b>TOTAL TIER II</b>  | 3      | \$ | 294,577   |
| <b>OTHER PROGRAMS</b>   |        |    |           |
| Staff Salary Allotment  | 13     | \$ | -         |
| Charter has at least an acceptable academic performance rating?       |        |    | NO        |
| HB21 - State Facilities Allotment                                     | 16     | \$ | -         |
| <b>TOTAL OTHER PROGRAMS</b>   | 3      | \$ | -         |
|   | SOF pg |    |           |
| <b>TOTAL STATE AID</b>  | 3      | \$ | 2,310,572 |
| <b>Available School Fund (ASF)</b>                                    | 3      | \$ | -         |
| <b>Foundation School Fund (FSF)</b>                                   | 3      | \$ | 2,310,572 |

## Cato Academy - S.Houston/Alvin/Pearland

### PAYMENT FORMULA EXAMPLE

|                           |              |
|---------------------------|--------------|
| FSP Allotment             | \$ 2,310,572 |
| Adjustments to Allotments | \$ -         |
| Less Total Paid to Date   | \$ -         |
| FSP Remaining Balance     | \$ 2,310,572 |

| Payment Month         | # of Remaining Payments | % of Unpaid Balance | Estimated Payments Schedule |
|-----------------------|-------------------------|---------------------|-----------------------------|
| September             | 12                      | 8.3%                | \$ 191,777                  |
| October               | 11                      | 9.1%                | \$ 192,810                  |
| November              | 10                      | 10.1%               | \$ 194,524                  |
| December              | 9                       | 11.1%               | \$ 192,192                  |
| January               | 8                       | 12.4%               | \$ 190,869                  |
| February              | 7                       | 14.4%               | \$ 194,169                  |
| March                 | 6                       | 16.6%               | \$ 191,602                  |
| April                 | 5                       | 19.9%               | \$ 191,563                  |
| May                   | 4                       | 25.1%               | \$ 193,537                  |
| June                  | 3                       | 33.2%               | \$ 191,739                  |
| July                  | 2                       | 49.7%               | \$ 191,737                  |
| August                | 1                       | 100.0%              | \$ 194,051                  |
| <b>Total Payments</b> |                         |                     | <b>\$ 2,310,572</b>         |



## Attachment 32: Budget Narrative

Provide a detailed budget narrative. Describe the assumptions behind the projections for revenue, staffing levels, and costs that are outlined in the Financial Plan Workbook.

### Support Narratives of Operational Budget

- Principal- An administration salary of \$98,000 per year. Salaries increase at 3% for years two and three. Assistant Principal and Director of Instruction (PD, data, curriculum fidelity) join in year 2 with increased enrollment. PD supported with outside contractors, publishers year 1.
- Teacher-Regular Education- Year one, based on 306 students and 40,000 square feet of space, we assume to employ 13 full time teachers at an average salary of a high/low \$57,000 annually. In year two, based on 485 students and 40,000 square feet, we assume to employ 21 teachers at \$57,000 annually (plus a 3% increase from the previous year), and in year three, based on 649 students, we assume to employ 27 full time teachers at \$57,000 annually (plus a three percent increase from the previous year).
- Food Service- Cato Academy will contract with local Texas vendor for lunch services. The vendor will bill families directly for food service from local restaurants. Support staff for food service and lunch monitoring is included in the payroll numbers of the P&L template. We assume to contract for service in years one to five at the cost of approximately one full time food service employee at \$15,000. We assume to employ 2 full time lunch/support workers at an average salary of \$15,000. In year three to five, based on 649+ students and 40,000 square feet, we assume to employ 3 lunch/support workers at \$15,000 (3% increase from the previous year). These are part time positions.
- Clerical/Registrar- Based on our enrollment projections in years one to three, we assume to employ one Clerical/Registrar at \$37,000 per year with 3% increases in years two and three.
- Bookkeeper/Finance (Business Manager)- Based on our enrollment projections in years one to three, we assume to employ one Bookkeeper/Finance agent at \$54,000 per year with 3% increases in years two and three.
- Custodial/Maintenance- Year one, based on 306 students and 40,000 square feet of space, we assume to employ 2 full time custodial workers at an average salary of \$38,000. In year three to six, based on 649+ students and 40,000 square feet, we assume to employ 3 custodial workers at \$32,136 (3% increase from the previous year)
- Employee Benefits- Employee benefits include Medicare 1.45%, Comp, Disability .15% and AD and D of .16%, based on the direct salary of the given annual salary. Social security withholding is 6.2% and unemployment withholding in Texas is estimated at 1.25% Benefits increase at 3% in years two and three with salary increases.
- Employee Insurance- Employee insurance include an assumption of \$3840 (\$320 per month) per participating employee (of direct salary) for healthcare. Assuming 80% participation rate. At \$60k salary, and 80% participation, assuming 6% of total payroll. Insurance increase at 3% in years two and three with salary increases.

- Office Supplies (Paper, Postage, etc.)- This line item is primarily postage. Assumed at \$3060 per year, and increasing with enrollment and by 3% in years two and three to six respectively.
- Legal- Based on our enrollment projections, physical plant, and operations, we assume legal expense of at or below \$5,500 per year. This figure increases by 3% in years two and three respectively.
- Memberships, Dues, Registration, and Travel- Based on our enrollment projections and staff size, we assume memberships, dues, registrations and travel at or below \$6,000 in year one, \$9,000 in year two, and \$12,000 in year three to five.
- Assessment- Based on our enrollment projections, at \$12.00 per student, we assume our assessment expense to be \$3,672 in year one, \$5,820 in year two, and \$7,788 in year three to six.
- Contracted Services (Special Education)- Based on our enrollment projections, we assume contracting for special education services will be \$65,000 in year one, \$95,000 in year two, and \$130,000 in year three. These expenses are offset in portion by the Exceptional Children's Education Act revenues in each years line item of revenues.
- Curriculum and Resource Materials- Based on our enrollment projections, we assume curriculum and resource materials will be \$148,985 in year one (which is included in the initial financing package). Year 1 includes Schoology LMS only at \$5500. Ongoing for LMS, consumables and replacements, we are assuming \$75 per scholar per year or \$34,800 in year two, and \$48,675 in year three and \$52,800 in Y4 and Y5.
- Information Technology- Based on our enrollment projections, we assume information technology services, equipment and training will be \$30,000 in year one, and increase at 3% in year two and three respectively.
- Auditor Fees- Based current market conditions, we assume audit and fee expense at \$10,000 and increasing 3% in years two and three.
- Legal Fees – We are assuming a \$5,500 first year legal expenses for review of Board Policies, HR Policies, Student Handbooks and other formation documents required to operate a Texas Charter School. Year two and beyond we are assuming a drop off of legal service fees to \$5500 per year with 3% adjustment.
- Marketing and Advertising- Based on analysis, we anticipate ongoing marketing and advertising to \$18,915 in year one, and increase by 33% in y2 to \$25k in years two and leveling at \$26k for y3 to 5. Recognizing how essential marketing is to attracting students and meeting enrollment goals, the facility development budget (start up funds) includes a marketing category of \$70,000 based on the following activities which will take place prior to school opening.
  - \$10,000 Direct mail, households in a 10-mile radius with children from 11 to 15
  - \$20,000 Web based marketing to include - Search Engine Optimization - Facebook.
  - \$10,000 Radio advertising
  - \$ 3,000 Printing and brochure/welcome package design
  - \$ 5,000 Cable TV
  - \$ 2,000 Outdoor Billboards
  - \$ 5,000 Teacher Recruitment



The marketing budget in Year 0 is \$70,000 which has been included in the Start-Up funds and \$18,915 in Y1. Year 3 to 5 budgeted as \$25k to \$26k annually. This budget will be adjusted as needed based on enrollment and growth needs.

- Contracted Services- Contract services include, general administration and business operations, and all compliance related functions. Three vendors with Texas state based experience will be reviewed and asked to submit an RFP for services. Scope will include, compliance, board training and advisement on financial procedures, quarterly P&L, balance sheet and financial reporting for the board and reconciliation of school accounts. Based on our enrollment projections we assume a contracted service expense of \$12,000 in year one, with 3% increases annually.
- Student and Facility - Liability Insurance- Based on our enrollment projections, we assume building and student liability insurance for the school to be \$39,000 annually and increasing with enrollment to \$88k by year 5.
- Substitute Teachers- Based on our enrollment and staff projections, at \$130 per day, assuming 6 days per year per teacher, we assume our substitute teacher expense to be \$14,820 in year one, \$21,785 in year two, and \$27,232 in year three to five.
- Staff Bonus Line Items – Contingency – Year one, teacher and athletic stipends will not be paid as the teaching team is being established. By year two \$30,000 in stipends. (\$10,000 teacher stipend, \$5,000 AD stipend, \$12,000 athletic coaches stipend, and \$3000 staff recognition.)
  - Non-coaching stipends- Based on our enrollment and staff projections, at \$1,500 per stipend, assuming approximately 50% of teachers will draw a stipend of some kind, we assume our stipend expense to be \$10,000 in year two to five.
  - Athletic Director - Year one, based on 306 students and 8 sports, we assume to employ 1 full stipend Athletic Director to be added on to the Physical Ed Director, in the amount of \$5,000.
  - Athletic Coaches- Year one, based on 306 students and 8 sports, we assume to provide 8 stipends equal to approximately \$1,500 head coach, or \$12,000 per year.
  - Staff Recognition- Based on our enrollment and staff projections, at \$25 times approximately 100 events, we assume our staff recognition expense to be \$2,500 in year one, with increases of 3% in years two and three respectively.
- Landscape contract- Based on a campus site of approximately 6 acres, we assume a yearly landscape contract of \$6000 (\$500 per month). Additional supplies for maintenance, \$6,000 per year for a total of \$12,000.
- Equipment, Supplies and Maintenance- Assuming \$1.50 per square foot of improved space (49,936 in year one and two, 60,502 in year three), we assume an expense of \$3,060 in year one and \$4,850 , and \$6,365 in year three and beyond in this category. The school will be included in national pricing from EcoLab for these expenses.

- Utilities - Based on our enrollment and staff projections, we assume our data and internet and electrical/gas expenses to be \$1.25 per square foot (based on 40,000 sq ft) or \$50,000 per year with increases of 3% in years two and three respectively.
- Phone/Internet Connectivity – Based on \$1,000 per month.
- Transportation- Based on a projected transportation need to commute students to and from extracurricular and field trips. \$7,650 year one, \$12,125 year two, \$16-\$17k year three to five. Transportation costs reflect field trips and sporting event bus chartering costs.

The proposed Cato Academy campus, when finished, will be large enough to hold 700 scholars. The campus will be projected at 40,000-square feet with a budget of between \$9.3 million. A guaranteed maximum contract will be negotiated with the help of the funding partner, Schoolhouse Development LLC. Schoolhouse has funded over 60 charter campuses around the US and brings experience and guidance to the project. The campus will have programmatic elements unique to Classical education including dedicated music and art facilities. The campus will have a full-size gymnasium and theater/coral stage, a cafeteria and specially designed Special Education rooms with smaller breakouts for individualized professional service.

In the event of an unforeseen issue that would affect the school opening, the Principal and Business Manager would begin reaching out to local area churches, exhibition halls or other large facilities to accommodate the student population.

#### **Facility Development Cost Assumptions**

- Building Rent/Lease Loan Phase 1 – 40,000 sq ft -
  - Year one- Assumption is based on a lease-back funding agreement under the following terms- Total development costs, \$9,247,000. First year payment based on 8.0% of development costs discounted 7 months, \$375,468 in years 1, in year 2 \$771,540.
  - Land (Included in initial development costs under lease-back agreement)- 4 to 6 acres at a total, \$1,100,000.
  - Fees and Permits (Included in initial development costs under lease-back agreement)- Estimated at \$256,000.
  - Architect and Engineering Fees (Included in initial development costs under lease-back agreement)- Estimated at \$256,000.
  - Hard Cost Contingency (Included in initial development costs under lease-back agreement)- Estimated at 5% of total construction costs. Total \$320,000. This is budgeted to address unforeseen construction costs, if there are none, these funds are not drawn and remain with the lender thus reducing the total debt. \$140,000 contingency interest reserve.
  - Vertical Construction (Included in initial development costs under lease-back agreement)- Based on 40,000 square feet at \$160.00 per square foot. Total, \$6,400,000.



- Office Furniture and Other Equipment (Included in initial development costs under lease-back agreement)- Included as part of the original FFE package with contractor. Estimate \$225,000.
- Student Technology Equipment (Included in initial development costs under lease-back agreement)- Included as part of the original FFE package with contractor. Estimate \$100,000.
- Office Technology (Included in initial development costs under lease-back agreement)- Included as part of the original FFE package with contractor. Estimate \$50,000.
- Year 0 Start Up Funds - \$400,000 to include initial Admin payroll, teacher initial training, start up marketing. Initial curriculum purchases. Initial chromebook purchases.

|                      |             |
|----------------------|-------------|
| Land                 | \$1,100,000 |
| Permit               | \$256,000   |
| Architect            | \$256,000   |
| Contingency          | \$320,000   |
| Vertical             | \$6,400,000 |
| FFE package          | \$225,000   |
| IT package           | \$100,000   |
| Office Supp          | \$50,000    |
| Start Up             | \$400,000   |
| Cap I<br>Contingency | \$200,000   |
|                      | \$9,247,000 |

- Phase 2 Building expansion of 25,000 sq ft to add on to the exiting 40,000 sq ft = 65,000
  - By year 3, to accommodate full capacity, the campus will be expanded and developer financed portion will be refinanced to the bond market. Budget for phase 2, 25,000 sq feet at \$150 per square foot. \$3,750,000.
  - Refinance of phase 1 (\$9.3m), addition of phase 2 (\$3.75m), fees and contingencies, (\$1m) = Total bond refinance = \$14,050,00.
  - Assume 5% rate at 30 year am = \$75,423 monthly or \$906,000

### **Attachment 33: Evidence of Other Financial Support**

Provide evidence of financial support from intended community partners such as:

- Letters of intent/commitment;
- Memoranda of understanding; and/or
- Contracts.

Applicants having no responsive documents to this attachment shall provide a statement on this attachment attesting, “The applicant has no documents in response to this attachment.”





Dr. Nicholas Ellen - Board Chair  
Classical Education Schools of Texas  
Cato Classical Academy  
7918 Broadway St # 106,  
Pearland, TX 77581

Please share this letter as you see fit with your prospective authorizers, potential parents, the community and any other interested parties relative to the potential for Schoolhouse Development to serve as facility developer and financier for the school facility for Cato Classical Academy. We understand your choice of location in Tampa and have reviewed your application and your demographics and we support this project. Our firm has worked with Classical School founders and networks before and find them to be great clients for our model.

We intend for this letter to provide a brief introduction to our firm and to communicate our deep, and serious interest in supporting Cato Academy. We hope you will find that our program will successfully marry the school's budgets and development cost expectations to a property and facility design in a way that meets the schools' expectations. We have reviewed your budget, timeline and building needs and are confident they will meet our underwriting parameters and your board's needs.

We also intend to communicate our ability to finance the purchase and development of suitable properties to meet your timeline. Our development package includes appropriate start-up funds to include funds needed to ensure agreed upon enrollment targets are obtained and the campus is built and stabilized. Start-up funds are projected to be \$400,000 on this project.

Schoolhouse is a private, tax-paying firm that serves educational clients exclusively providing 100% financing and turnkey development of school facilities. Schoolhouse has developed a number of charter schools in Arizona, Utah, Colorado, and Nevada. Some of the individual campuses and networks we've helped fund include, American Leadership Academy campuses, Odyssey Institute, Incito Schools Academy Del Sol, Paidea Academy, Candeo Schools, Legacy Schools, and others.

Schoolhouse is not a broker or consultant or middleman of any type. We are a full service, turnkey developer for charter school boards and private school operators fulfilling their facility needs with private capital. Our solution is not reliant on any federal programs, subsidies, contributions, or guarantees from philanthropic or civic entities.

Ours is a streamlined and affordable model is enjoyed by schools in over a dozen states.

I encourage your founders and anyone else interested to view our website: [www.schooldev.us](http://www.schooldev.us). At the site, people can review our portfolio and see that we employ

a team of professionals prepared to undertake real estate and development transactions necessary to open school facilities.

I look forward to continuing our dialogue and eventually working together. If I can provide any additional information, I'm happy to do so.

Sincerely yours,

A handwritten signature in blue ink, appearing to read 'S. Brand', with a stylized flourish at the end.

Scott Brand  
801-830-8300





## **Attachment 34: Audit Report**

Provide a copy of the sponsoring entity's most recent audit report. Use the format provided in the most recent version of the Financial Accountability System Resource Guide, Special Supplement-Charter Schools (Module 2) found at, [http://tea.texas.gov/Finance\\_and\\_Grants/Financial\\_Accountability/Financial\\_Accountability\\_System\\_Resource\\_Guide/](http://tea.texas.gov/Finance_and_Grants/Financial_Accountability/Financial_Accountability_System_Resource_Guide/).

Audit reports are not required for organizations that are less than one year old or for established organizations with no financial activity to date. If an audit report is not available, provide an unaudited financial report that includes from inception to date, the following:

- Statement of financial position
- Statement of activity
- Cash flow statement

**Cato Classical Academy** Statement of  
Financial Position  
December 31, 2019 to July 31, 2020

| <b>Assets</b>                           | 2020 | 2021 |
|---|------|------|
| Current Assets                          |      |      |
| Cash and cash equivalents               | 0    | 0    |
| Account receivable                      | 0    | 0    |
| Prepaid expenses                        | 0    | 0    |
| Total Current Assets                    | 0    | 0    |
|   |      |      |
| Property and equipment                  | 0    | 0    |
| Total Assets                            | 0    | 0    |
| <b>Liabilities and Net Assets</b>       |      |      |
| Current Liabilities                     | 0    | 0    |
| Accounts payable                        | 0    | 0    |
| Accrued liabilities                     | 0    | 0    |
| Deferred revenue                        | 0    | 0    |
| Current long term debt                  | 0    | 0    |
| Total current liabilities               | 0    | 0    |
|   |      |      |
| Long term debt                          | 0    | 0    |
| Total Liabilities                       | 0    | 0    |
| <b>Net Assets</b>                       |      |      |
| Unrestricted                            | 0    | 0    |
| Temporary restricted                    | 0    | 0    |
| Total Net Assets                        | 0    | 0    |
| <b>Total Liabilities and Net Assets</b> | 0    | 0    |



## Cato Academy

### Statement of Activities

Year Ending Dec. 31, 2019 to July 31, 2020

|  | <u>2019-2020</u> | <u>2020-2021</u> |
|--|------------------|------------------|
| <b>Income</b>  |                  |                  |
| <b>Student Revenues</b>  |                  |                  |
| 3110- State Revenues   | 0.00             | 0.00             |
| 1790 - Extrac. Activity Fee  | 0.00             | 0.00             |
| 1720 - Grants - Federal Other  | 0.00             | 0.00             |
| 1820 - After School  | 0.00             | 0.00             |
| <b>Total Student Revenues</b>  | <b>0.00</b>      | <b>0.00</b>      |
| <b>Education &amp; related fees</b>                                    |                  |                  |
| -Textbook Fees   | 0.00             | 0.00             |
| - Athletic fees  | 0.00             | 0.00             |
| - Transportation Fees  | 0.00             | 0.00             |
| - Uniforms Fees  | 0.00             | 0.00             |
| <b>Total Education &amp; related fees</b>                              | <b>0.00</b>      | <b>0.00</b>      |
| <b>Contributions &amp; fundraising</b>                                 |                  |                  |
| 1925 - Individual contributions  | 0.00             | 0.00             |
| 1910 - Gifts In Kind   |                  |                  |
| 1915 - Corporate Contributions   | 0.00             | 0.00             |
| <b>Total Contributions &amp; fundraising</b>                           | <b>0.00</b>      | <b>0.00</b>      |
| <b>Total Income</b>  | <b>0.00</b>      | <b>0.00</b>      |
| <b>Expenses</b>  |                  |                  |
| <b>Human Recourses</b>   |                  |                  |
| <b>Salaries &amp; Compensation</b>                                     |                  |                  |
| 6100 - Administration/office   | 0.00             | 0.00             |
| 6100 - Special Ed  | 0.00             | 0.00             |
| 6100 - Teachers  | 0.00             | 0.00             |
| 6100 - Teacher Aids  | 0.00             | 0.00             |
| 6100 - Teacher substitutes   | 0.00             | 0.00             |
| 6100 - Maintenance & custodial   | 0.00             | 0.00             |
| 6100 - Athletics/Coaches   | 0.00             | 0.00             |
| 6100 - After School Cord.  | 0.00             | 0.00             |
| <b>Total Salaries &amp; Compensation</b>                               | <b>0.00</b>      | <b>0.00</b>      |
| <b>Total Human Resources</b>   | <b>0.00</b>      | <b>0.00</b>      |
| <b>Instruction (Education)</b>   |                  |                  |
| <b>Classroom Expenses</b>  |                  |                  |
| Teacher Supplies   | 0.00             | 0.00             |
| <b>Total Classroom Expenses</b>  | <b>0.00</b>      | <b>0.00</b>      |
| <b>Instruction &amp; Support Services (other Educational Expenses)</b> |                  |                  |
| 6625 - Health services   | 0.00             | 0.00             |
| 6305 - SPED Expenses   | 0.00             | 0.00             |
| 6310- Counseling   | 0.00             | 0.00             |
| 6619 - Library Books/Supplies Combine                                  | 0.00             | 0.00             |
| <b>Other Educational Expenses</b>                                      | <b>0.00</b>      | <b>0.00</b>      |
| <b>Total Educational Expenses</b>                                      | <b>0.00</b>      | <b>0.00</b>      |

Page 1 of 20

|   |                   |                   |
|---|-------------------|-------------------|
| <b>Facility</b>                               |                   |                   |
| 6647 - Electricity                            | 0.00              | 0.00              |
| 6352 - Building maintenance                   | 0.00              | 0.00              |
| 6354 - Roof maintenance                       | 0.00              | 0.00              |
| 6356 - Grounds maintenance                    | 0.00              | 0.00              |
| <b>Total Facility</b>                         | <b>0.00</b>       | <b>0.00</b>       |
| <b>Capital Expenditures</b>                   |                   |                   |
| - Building improvements                       | 0.00              | 0.00              |
| - Land Improvements                           | 0.00              | 0.00              |
| 7910 - Furniture and fixtures                 | 0.00              | 0.00              |
| 7905- Capital Exp. Playground                 | 0.00              | 0.00              |
| <b>Total Capital Expenditures</b>             | <b>0.00</b>       | <b>0.00</b>       |
| <b>Total Expense</b>                          | <hr/> <b>0.00</b> |                   |
| <b><u>Summary</u></b>                         |                   |                   |
| <b>Total Revenues</b>                         | 0.00              | 0.00              |
| <b>Less: Total Expenses</b>                   | 0.00              | 0.00              |
| <b>Net Income (Loss) Change in Net Assets</b> | <hr/> <b>0.00</b> | <hr/> <b>0.00</b> |
| <b><u>Detail Summary</u></b>                  |                   |                   |
| <b>Total Cash Receipts</b>                    |                   |                   |
| State Student Revenues                        | 0.00              | 0.00              |
| Educational Revenues                          | 0.00              | 0.00              |
| Food Revenues                                 | 0.00              | 0.00              |
| <b>Total Cash Receipts</b>                    | <hr/> <b>0.00</b> | <hr/> <b>0.00</b> |
| <b>Total Cash Expenses</b>                    |                   |                   |
| Human Recourses                               | 0.00              | 0.00              |
| Education                                     | 0.00              | 0.00              |
| Office  | 0.00              | 0.00              |
| Development                                   | 0.00              | 0.00              |
| Admissions                                    | 0.00              | 0.00              |
| Facility                                      | 0.00              | 0.00              |
| Transportation                                | 0.00              | 0.00              |
| Athletics                                     | 0.00              | 0.00              |
| Food  | 0.00              | 0.00              |
| Administration                                | 0.00              | 0.00              |
| Board   | 0.00              | 0.00              |
| Debt Service                                  |                   |                   |
| Other   | 0.00              | 0.00              |
| Contingency                                   |                   |                   |
| Capital                                       | 0.00              | 0.00              |
| <b>Total Cash Expenses</b>                    | <hr/> <b>0.00</b> | <hr/> <b>0.00</b> |
| <b>Net Cash Flow</b>                          |                   |                   |
|   | <hr/> <b>0.00</b> | <hr/> <b>0.00</b> |



# Cato Academy

## Cash Flow Statements

Dec. 31, 2019 - July 30, 2020

|                              | <u>2019-2020</u> | <u>2020-2021</u> |
|------------------------------|------------------|------------------|
| <b><u>Detail Summary</u></b> |                  |                  |
| <b>Total Cash Receipts</b>   |                  |                  |
| State Student Revenues       | 0.00             | 0.00             |
| Educational Revenues         | 0.00             | 0.00             |
| Food Revenues                | 0.00             | 0.00             |
| Contributions                | 0.00             | 0.00             |
| Funds Transferred            | 0.00             | 0.00             |
| Other Income                 | 0.00             | 0.00             |
| <b>Total Cash Receipts</b>   | <b>0.00</b>      | <b>0.00</b>      |
| <b>Total Cash Expenses</b>   |                  |                  |
| Human Recourses              | 0.00             | 0.00             |
| Education                    | 0.00             | 0.00             |
| Office                       | 0.00             | 0.00             |
| Development                  | 0.00             | 0.00             |
| Admissions                   | 0.00             | 0.00             |
| Facility                     | 0.00             | 0.00             |
| Transportation               | 0.00             | 0.00             |
| Athletics                    | 0.00             | 0.00             |
| Food                         | 0.00             | 0.00             |
| Administration               | 0.00             | 0.00             |
| Board                        | 0.00             | 0.00             |
| Debt Service                 |                  |                  |
| Other                        | 0.00             | 0.00             |
| Contingency                  |                  |                  |
| Capital                      | 0.00             | 0.00             |
| <b>Total Cash Expenses</b>   | <b>0.00</b>      | <b>0.00</b>      |
| <b>Net Cash Flow</b>         | <b>0.00</b>      | <b>0.00</b>      |

## **Attachment 35: Credit Report**

Provide a copy of the sponsoring entity's credit report dated within the last six months. If the entity was incorporated prior to January 1, 2018, but has no credit history, a response from one of the credit rating bureaus (Equifax, Experian, TransUnion) must be attached indicating the entity has no credit history.

If the sponsoring entity was incorporated after January 1, 2018, a credit report is not required. Instead, the applicant shall provide a statement on this attachment attesting, "No documents are being provided because the sponsoring entity was incorporated after January 1, 2018."

No documents are being provided because the sponsoring entity was incorporated after January 1, 2018



### **Attachment 36: IRS Form 990, Form 990-N, or Form 990-EZ**

Provide the sponsoring entity's most recently filed (IRS) Form 990, Form 990-N, or Form 990-EZ. For an organization less than one year old, or if a Form 990 is not available, provide a statement that explains why a form 990 is not available.

**The form 990 is not available as the entity was incorporated in January of 2020 and has had no business activity to date.**

## Attachment 37: Plan for Insurance Coverage

Provide a list of the types of insurance coverage the school will secure, including a description of the levels of coverage.

### *Professional Qualifications for Cato Academy's Contracted Service Providers*

All vendors will be subject to the following set of criteria:

- a) **Expertise:** The school will seek to match school needs with the specialty of potential vendors. The school will only contract with A rated insurance vendors such as Philadelphia Insurance Companies or others that uniquely understand the nuances of coverage for a public charter school.
- b) **Reliability and Stability:** determined by a combination of credentials and reference checks of credibility, including Better Business Bureau, reviews, and insights provided by the Texas Charter Association.
- c) **Price:** In order to be solid stewards of public funds, Cato Academy will evaluate financial investments in outsourcing to ensure that the services are reflective of the price.
- d) **Location:** While considering cost effectiveness and competence, Cato will also attempt to outsource to qualified vendors that are local in order to stimulate business development within the community served.

Property/Casualty Insurance/Liability- and Student Liability Insurance; Assuming \$1.00 per square foot of improved space (40,000 in year one to six), we assume an expense of \$42,000 in year one to six in this category.

Employee Benefits- Employee benefits include Medicare 1.45%, Disability .15% and AD and D of .16%, based on the direct salary of the given annual salary. Benefits increase at 3% in years two and three with salary increases. Workers Comp included in employee benefits budgets (\$1,000,000 minimum each accident).

### Minimum Insurance Coverage's:

Commercial General Liability - Minimum of \$2m per occurrence.

Damage to rented premises - \$200,000

Medical Expense any one person \$5000

Personal and Adverse injury - \$2,000,0000

General Aggregates - \$2,000,000

Automobile Liability – Minimum of \$1m per occurrence.

Umbrella Liability - \$5,000,000 each occurrence.

Riders that are recommended and pending board approval and budget constraints will be added to the schools insurance policy.

**Abuse & Molestation** - Claims of child abuse frequently allege negligence in 3 areas:

- Failure to exercise sufficient care in the selection of staff
- Failure to properly supervise the abuser



- The charter school allowed the abuser to continue working with children after abuse was suspected

**Directors & Officers Liability -**

- *Side A Coverage:* Insures individual directors & officers to protect their personal assets.
- *Side B Coverage:* Reimburses the organization for costs incurred when the organization indemnifies directors and officers in a claim.
- *Side C Coverage:* Protects the organization itself when it is named as a defendant in a claim.

**Professional Liability (E&O) -**

- failure to educate
- failure to supervise a classroom
- failure to respond to or prevent bullying activities of students

**Employment Practices Liability** - This type of liability insurance is provided by our PPO/Payroll company but additional research must be done to ensure the deductibles and terms of the policy are sufficient. These events include:, sexual harassment, failure to hire despite meeting qualifications, and wrongful termination. This policy protects charter schools against employee suits alleging violations of their rights under various federal acts.

**Employee Benefits Liability** - With this type of insurance policy, any wrongful acts that may be committed by a charter school's administration in regard to an employee benefit program will be covered.

**Internet Liability.** Should any personal or business-related information be compromised over the Internet, this type of policy will provide the necessary coverage.

**Identity Theft.** Should the identity of an employee or a student be compromised, this type of coverage will offer the help that is needed to guide them through restoring their identity and protecting it in the future.

**Flood and earthquake**

**OPEN-ENROLLMENT CHARTER SCHOOL APPLICATION**  
**Generation Twenty-Five**  
**Special Assurances Document**

Sponsoring Entity: Cato Classical Academy

Proposed Charter School Name: Classical Charter Schools of Texas, Inc.

*The Board Chair of the proposed sponsoring entity shall initial each and all assurances within this document to confirm awareness and understanding of responsibilities established herein.*

**I. Open Meetings Requirements**

NE The proposed charter holder assures that all meetings in which charter school business is discussed will be posted to provide public notice, held in an open public forum, and any action items voted upon in a public forum as required by the Open Meetings Act in Government Code, Chapter 551.

NE Furthermore, the proposed charter holder assures that all of the following will be discussed in open meetings and only acted upon with approval of the charter holder board:

- The annual budget and all amendments to the budget,
- Any changes to job descriptions from those submitted in the application for charter, and
- Any changes in compensation from compensation as submitted in the application for charter.

**II. Public Information Requirements**

NE The proposed charter holder assures that information, that is considered public, requested by anyone will be provided in accordance with Government Code, Chapter 552.

**III. Criminal History Check Requirements**

NE The proposed charter holder assures that criminal history checks will be completed in accordance with law and that no person will serve as a member of the governing body of a charter holder, as a member of the governing body of the charter school, or as an officer or employee of an charter school if the person has been convicted of a misdemeanor involving moral turpitude, a felony, an offense listed in TEC 37.007(a) or an offense listed in Article 62.001(5) Code of Criminal Procedure.

**IV. Annual Training Requirements**

NE The proposed charter holder assures that all annual training requirements for board members and school administrators will be completed in accordance with law and commissioner rules.

**V. Residential Facilities Monitoring (RFM) System**

NE The proposed charter holder assures that it understands that, pursuant to 19 Texas Administrative Code (TAC) §97.1072, there is a specific system for monitoring school districts and charter schools that serve students with disabilities who reside in RFs. The charter holder further assures that it understands that it will be required to report data related to students with disabilities residing in RFs in TEA's data collection system known as RF Tracker and that it may be subject to RFM intervention activities and on-site visits based upon a review of the data it reports or on random or other means of selection.

**VI. Special RF Training**

NE The proposed charter holder assures that all personnel involved with serving students with disabilities residing in an RF and personnel involved with reporting data in *RF Tracker* will receive training on the RFM system.

Page



Sponsoring Entity: Cato Classical Academy

Proposed Charter School Name: Classical Charter Schools of Texas, Inc.

## VII. Admission and Enrollment

NE The proposed charter holder assures that parents or prospective students will not be required to attend an interview or meeting of any kind prior to admitting and/or enrolling a student, or during the time in which the student is enrolled.

NE The proposed charter holder assures that volunteer hours, or payment in lieu of volunteer hours, will not be required of the parent or guardian as a requirement for student admission or enrollment.

NE The proposed charter holder assures that there will be no specified days designated for enrollment and/or admission. If space is available, a student will be enrolled and admitted on any day at any time of day and must be counted as and considered a charter student immediately. State law does not allow for a trial enrollment period at a public school.

NE The proposed charter holder assures that no student auditions will be required prior to enrollment and admission at the charter school unless the charter is originally approved by the commissioner of education as a performing arts school with an audition component or the charter is amended by the commissioner of education to designate the school a performing arts school with an audition component.

NE The proposed charter holder understands that a student may be ineligible for enrollment at a charter school based on a history of a criminal offense, a juvenile court adjudication, or discipline problems under Texas Education Code (TEC), Chapter 37, Subchapter A, only if the enrollment prohibition is specifically approved by the commissioner of education when the charter is awarded, or if the charter is amended by the commissioner of education to allow this enrollment prohibition. It must be noted that the enrollment prohibition is not allowed for any prior discipline problems, but only those specified in TEC, Chapter 37, Subchapter A.

## VIII. Public Meeting(s)

NE The proposed charter holder assures that a public meeting will be held, in accordance with the requirements outlined in Attachment 6 of this application, for each approved campus opened after Year 1, at least 6 months prior to opening that campus. The proposed charter holder further assures that such meetings will be held within the city of the proposed campus address.

## IX. Withdrawal and Expulsion

NE The proposed charter holder assures that it understands that only the parent or guardian may withdraw a student from the charter school, and the only time charter administrators may withdraw a student and use administrative withdrawal as the leaver code is in the rare instances when:

- a student is withdrawn by the charter school because the charter school discovers, when verifying enrollment information, that the student was not a resident of the district at the time of enrollment;
- the charter school discovers that the student has falsified enrollment information;
- proof of identification is not provided; or
- immunization records are not provided within 30 days of enrollment.

NE The proposed charter holder understands that a student who fails to comply with the charter school's student code of conduct may not be administratively withdrawn. If a student commits an expellable offense, as outlined in the student code of conduct, the charter holder further understands that charter administrators may expel the student only after due process has been afforded the student, and the charter holder board has determined that expulsion is the appropriate consequence.

Page

Sponsoring Entity: Cato Classical Academy

Proposed Charter School Name: Classical Charter Schools of Texas, Inc.

NE The proposed charter holder understands that it has an obligation to notify the school district in which the student resides within three business days of any action expelling or **withdrawing** a student from the charter school. See 19 TAC §100.1211 (c).

NE The proposed charter holder assures that each campus granted through the initial charter contract and all subsequent renewal, expansion, and re-designations shall establish and maintain gun-free campus policies. The charter shall also expel a student who brings a firearm, as defined by 18 U.S.C. Section 921, to school. See TEC §37.007(e).

#### **X. Ready to Open Check-List**

NE The proposed charter holder understands, upon any subsequent approval and award of charter, that a ready-to-open check list may be required to complete prior to final approval for the opening of any campus.

#### **XI. Postponement of Opening**

NE The proposed charter holder understands that any request for the postponement of opening shall be denied if the founding Board no longer constitutes the governing Board at the time of the request.

#### **XII. Federal and State Funding**

NE The proposed charter holder understands that any request for assistance from the Texas Education Agency that is to be provided from *Every Student Succeeds Act* funds, as granted by the *Every Student Succeeds Act of 2015*, must comply with the *The Guns-Free Schools Act*. See 20 U.S. Code § 7151.

NE The proposed charter holder understands that any *Every Student Succeeds Act* funds that are applied towards campus(es) operated on the premises of a public university or college may be effected by new open-carry handgun legislation on public university and college campuses. See Senate Bill 11, as approved by the 84th Legislature, 2015.

NE The proposed charter holder understands that upon receipt of its first federally funded grant from TEA, "specific conditions" will be imposed upon it, including requirement to participate in training and technical assistance provided by the Department of Grants and Federal Fiscal Compliance. The training and technical assistance is designed to help new charter schools ensure that federal grant funds are used in accordance with applicable statutes, regulations, and requirements. TEA is authorized to impose specific conditions by Title 2 of the Code of Federal Regulations (CFR), 200.331 (c) and 200.207.

#### **XIII. Required Disclosure**

NE The proposed charter holder assures that all information subject to a required disclosure of fact(s) has been expressly provided within the *Charter School Application* to the extent authorized by all controlling law.

Page



Sponsoring Entity: Cato Classical Academy

Proposed Charter School Name: Classical Charter Schools of Texas, Inc.

*I, the undersigned, hereby certify that the governing body of the charter holder has authorized me to provide these assurances as noted by my initials on this and all previous pages.*

Dr. Nicholas Ellen

Printed Name of Sponsoring Entity Board Chair

Nicholas Ellen  
Signature of Sponsoring Entity Board Chair

1-17-20  
Date

Page