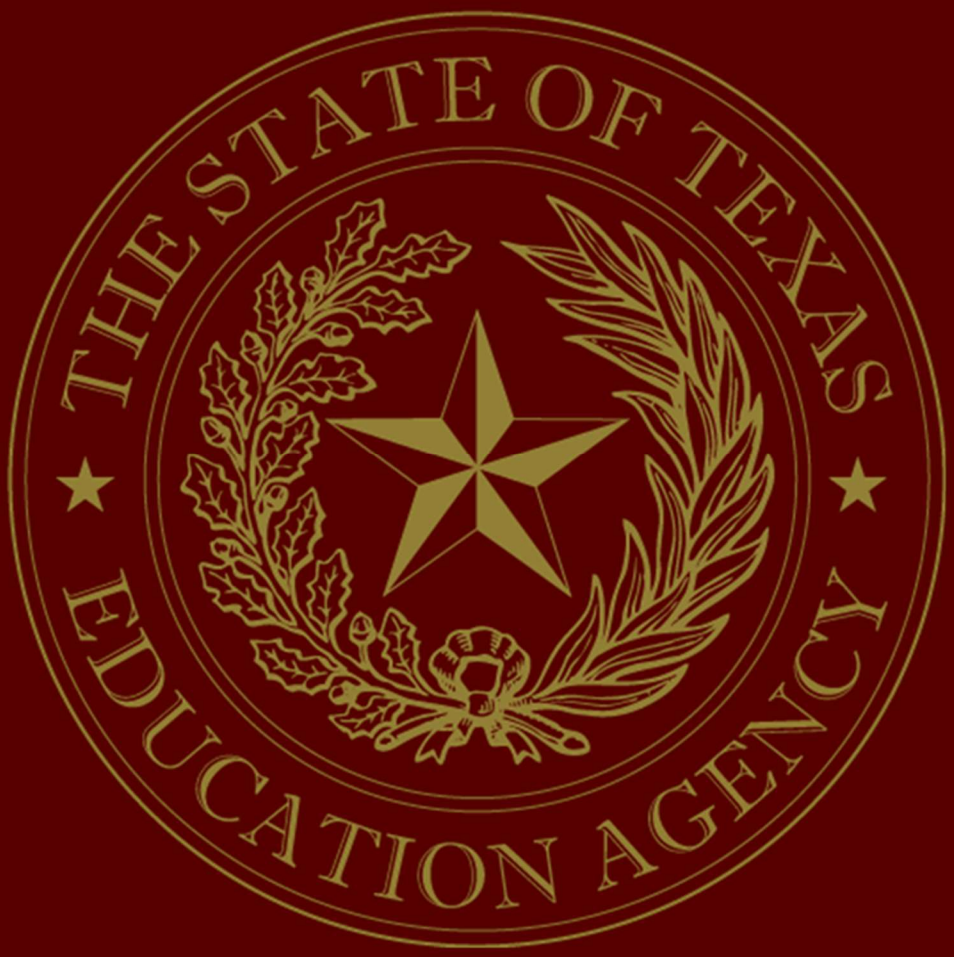
Texas Education Agency
1701 North Congress Ave.
Austin TX 78701



GENERATION 26

OPEN-ENROLLMENT CHARTER APPLICATION

NEW OPERATOR APPLICATION

RESPONSES & ATTACHMENTS

RFA: 701-21-104

SAS: 568-21

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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	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 • Geographic Boundaries • Enrollment Projections • Demographic Projections	YES
	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

Sections	Required Elements	Yes/No
Talent Management and Development	Talent Management	YES
	Professional Development and Evaluation	YES
Operational and Financial Plans	School Calendar and Schedule	YES
	Student Recruitment and Enrollment	YES
	Facility Acquisition • Facility Identified • Facility Not Identified	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

Sections	Required Elements	Yes/No
Attachments	Attachment 13: Organizational Charts for Year 1, Year 3, and Full Capacity	YES
	Attachment 14: Tool(s)/Process to Evaluate Superintendent	YES
	Attachment 15: Résumé and Qualifications for Proposed Superintendent OR	N/A
	Attachment 16: Job Description or Qualifications for Superintendent	YES
	Attachment 17: Résumé(s) and Qualifications for Proposed Instructional Leadership Team	N/A
	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

Sections	Required Elements	Yes/No
Attachments	Attachment 27: Proposed Admissions and Enrollment Policy	YES
	Attachment 28: Certificate of Occupancy for Facility	N/A
	Attachment 29: Evidence that Facility Has Been Secured	N/A
	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
Special Assurances	Special Assurances	YES
CSP Addendum	CSP Addendum	YES
CMO Addendum	CMO Addendum (if applicable)	N/A

Applicant Cover Sheet

NAME OF PROPOSED GENERATION TWENTY-FIVE CHARTER SCHOOL	
Heritage Classical Academy	
NAME OF SPONSORING ENTITY	
Heritage Ed	
The sponsoring entity is a:	☒ 501(c)(3) Nonprofit Organization ☐ Governmental Entity ☐ College or University

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	**Stuart Saunders**	**Has not been selected**	**Stuart Saunders**
Mailing address	**602 Sawyer Street, Suite 720 Houston, TX 77007**		**602 Sawyer Street, Suite 720 Houston, TX 77007**
Email address	**sdsaunders@missionheights.net**		**sdsaunders@missionheights.net**
Phone number	**(713) 914-9778**		**(713) 914-9778**

II. CHARTER SCHOOL INFORMATION

Grade level(s) served in Year 1	K-1
Number of students served in Year 1	192
Grade levels served at capacity	PK3-8

Number of students served at capacity	Year 5: 756; At capacity: 1,056
Student teacher ratio	Year 1: 19.2:1; Year 5: 18.1:1
Number of campuses requested	1
Number of districts within geographic boundary	3 (primary) 3 (secondary)

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

Address of Proposed Administrative Offices *(if different from above):*
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:
Harris County, zip codes: 77018, 77088, 77091, or 77092

III. GOVERNANCE/LEADERSHIP

Number of Board Members	6
Chairperson of the Governing Board	Stuart Saunders
Chief Executive Officer of the Sponsoring Entity	Stuart Saunders
Superintendent of Proposed Charter School	Not Yet Selected
Board Member Who Attended Applicant Conference	Stuart Saunders

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

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

Full Name	Position or Role with Proposed Charter School
Stuart Saunders	Board President

Kathryn van der Pol	Board Secretary; Education Committee
Richard Hendee	Board Treasurer
Chelsea Collins	Board Member: Education Committee
Debra Schindler-Boultinghouse	Board Member; Facilities Committee
E. F. Mano DeAyala	Board Member

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?**	
EduStart LLC	Yes ☒	No ☐
Families Empowered	Yes ☒	No ☐
Texas School Venture Fund	Yes ☒	No ☐
EDreimagined LLC	Yes ☒	No ☐
Barney Charter School Initiative	Yes ☐	No ☒

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-Six Open-Enrollment Charter Application Instructions document.



January 18, 2021 Stuart Saunders

Signature of Chief Executive Officer of Sponsoring Entity *(Blue Ink)* | Date | Printed Name

School Overview

Executive Summary

(This section adapted from the Executive Summary on pages 12-13 of the HCA GEN 25 application.)

We are a nation at risk (*A Nation at Risk, 1980*). The profound lack of civil discourse in America today threatens our safety and our democracy. To counteract this growing trend, our education system needs schools that will ensure that students can read with fluency and comprehension; gain a knowledge of history, government, and civics; and become grounded in moral virtues. Students will then have the tools and moral compass to make good decisions and engage in respectful dialogue with others based on facts.

The founders of Heritage Classical Academy (HCA) plan to create a new school to change this current national trajectory. The Board President, Secretary, and another board member have experience with and passion for a rigorous, classical, liberal arts education and desire to being this type of education to underserved students in Northwest Houston. The HCA Board selected Northwest Houston based on data from an HCA-commissioned Families Empowered survey of 309 families (in seven zip codes surrounding the potential school site area) that assessed demand for a classical education. The survey demonstrated that 97 percent of the respondents were very interested in this type of school, and 80 percent did not have good school options for their children in this area. Two HCA public meetings were attended by 80 people and 229 people in a recent Tele-town hall showed interest. HCA plans to open with grades K-1 to ensure a grounding in excellent reading skills, and then expand to grades PK3-8 with a projected 1,056 students at capacity.

The mission of HCA is to provide a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom and character to a state of virtue and by preparing them as well-educated, self-governing citizens and leaders for the next generation of America. HCA will partner with Hillsdale College's Barney Charter School Initiative (BCSI) (https://www.hillsdale.edu/educational-outreach/barney-charter-school-initiative/) to apply in partnership for a charter school authorized by the Texas Education Agency to serve diverse students (76% FRL). This partnership, which BCSI provides **at not cost**, was established after a rigorous application process (letter attached p. 251-252). The HCA education model is based on design principles gleaned from effective schools research (*What Effective Schools Do: Reinvisioning the Correlates*, Lezotte and Snyder, 2011), the Texas Education Agency (TEA) levers of effective schools, and the BCSI guiding principles: 1) strong instructional leadership; 2) outstanding, well-supported and well-trained teachers holding high expectations for ALL students; 3) effective, data-driven instruction with frequent progress monitoring to differentiate instruction using multiple instructional

modalities, enabling all students to master the TEKS; 4) an orderly, safe environment and positive school culture that promotes learning; 5) sufficient time on task; 6) a high-quality curriculum grounded in the classical liberal arts to promote critical thinking, the ability to discourse in a civil manner, and a love of learning; 7) systematic character development; and 8) positive home/school relations and parent engagement.

To achieve its mission, HCA will emphasize an education in the humanities, science, and arts using evidence-based programs including: The Core Knowledge Sequence; Riggs Institute *The Writing & Spelling Road to Reading & Thinking*; and *Singapore Math* (a conceptual approach to mathematical skill building and problem solving). HCA will abide by all state laws regarding its special education (SPED) and English Learner (EL) populations and will employ the Multi-Tiered System of Support (MTSS) to scaffold instruction in math and reading for any struggling students, including ELs. Innovative programs for the proposed population include the teaching of Latin roots in the primary grades and formal Latin in grades 6-8; extensive use of primary original source material instead of textbooks; and training in study skills. An external advisory group comprised of a diverse set of educators, community members, students, and parents will annually review all curriculum materials and instructional approaches to ensure cultural relevance and inclusion.

The Founding Board members have expertise in banking, finance, business operations, law, real estate, public and private education, and marketing/PR. Board members have demonstrated their commitment to this school with a financial gift of $15,000 and a commitment of $1,000,000 from the Saunders Family Foundation (see **Attachment 33,** pp. 483) to ensure a quality startup. Community partnerships include Houston Baptist University for student teachers; Neuhaus Center for dyslexia training; YMCA for after school programming; American Productivity and Quality Center (APQC) for support in process improvement. The Founding Board will select an outstanding school leader with the educational background, experience, and values to execute HCA's mission and virtues.

The HCA Founding Board members value educational and social equity and thus deeply desire to provide a classical choice education model to underserved student populations in Houston. It is critically important at this time to establish more classical education charter schools to ensure an educated citizenry, grounded in the principles of our republic. Benjamin Franklin, at the close of the Constitutional Convention, when asked what type of government had been created, replied, "A republic, madam, if you can keep it." (*If You Can Keep It*, Metaxas, 2017, p.9). HCA intends to spark a resurgence in classical education that will enable this nation to keep its republic.

Targeted Community and Anticipated Student Population

Optional Priority Point. 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? By checking yes, applicant must cite clear and specific evidence to support this claim.	Yes ☒ No ☐

Number of Campuses and Estimated Student Enrollment and Growth Plan

HCA is proposing to create one campus at this time. The Founding Board, based on the success of this first campus, will strongly consider establishing additional campuses to serve more students with the classical education model. The philosophy of the Founding Board is to apply its resources to create one model classical education school over a five-year period, and then assess how, when, and where to expand to additional campuses. Without an outstanding CEO/Superintendent hired at the time of application submission, the Board felt it prudent to postpone making decisions about expansion.

After examining the data of all the BCSI schools, HCA has elected to open with a projected 192 students in grades K-1. Since a classical education relies so heavily on excellent reading skills, it is critical that all students receive a head start on achieving fluency and comprehension through a program based on scientific research in reading. HCA will then add a grade each year until it reaches grade 8 and a projected enrollment of 1056 students. Early Childhood (PK3 and 4), which will be added in years 3 and 4, respectively, will have 22 students in a section, lower school (K-4) will have 24 students in a section; and middle school (5-8) will have 25 students per section.

Rationale for Proposed Geographic Location

Houston Independent School District (HISD) serves over 209,000 students and operates 280 schools, the largest school district in Texas and the seventh largest in the country. While the district was rated a B district for the 2018-19 school year, only 44% of all students have met or exceeded grade level in all tested subjects. Moreover, 42% of student were at or above grade level in Reading/ELA; 47% in Math; 36% in Writing; 45% in Science and 48% in Social Studies. In every subject area, the district's achievement levels are lower than the state levels. What this means for students is that over 50% of students in the district are not performing at grade level, demonstrating there is still much work to be done to create equitable access for all students. Furthermore, within the target zip code where HCA hopes to locate, seven different elementary and middle schools have been rated a D or F consecutively over the last two years, indicating that it must be a priority to provide high quality offerings for students in this community.

Looking specifically at those families in the four zip codes we hope to locate (77018, 77088, 77091, and 77091) students are surrounded by six schools that are unacceptable given they have received a D or F rating for two years in a row. These schools include three elementary – Highland Heights, Smith, and Wesley. Then when transitioning to middle they are surrounded by another three unacceptable middle schools – Williams, Clifton, and H S Ahead Academy. Furthermore, two of these four zip codes – 77088 and 77091 are within opportunity zones as designated by the federal government. This demonstrates the need for development both educationally and economically in these neighborhoods.

In examining this data, HCA selected this geographic area for four reasons: 1) HCA seeks a diverse student body that provides students from the three contiguous districts an innovative school option; 2) a Families Empowered Survey that will be described in the Community Engagement section indicated strong demand for a classical education school among families in Northwest Houston; 3) Houston Classical Academy, granted a charter in 2019, plans to serve students in Southwest Houston, leaving the northwest area open for a new classical charter school; and 4) there is increased development, and hence demand, in Northwest Houston where current district schools are near or at capacity, demonstrating a need for increased supply.

Sources

- Houston ISD Facts & Figures 2018-2019: **https://tinyurl.com/HoustonISDFacts**
- TEA School/District Overviews: https://txschools.gov/
- HISD Campus Attendance Zone Maps: https://www.houstonisd.org/Page/111709

Effectively Serving the Target Population. The target population HCA is aspiring to serve is estimated by taking an average of the populations of the three contiguous districts in the area: Houston ISD, Spring Branch ISD, and Aldine ISD with the exception of the SPED population that we have increased to 10.2% to ensure identification. There are several factors that we believe will enable HCA to more effectively serve the targeted population than existing schools within the proposed primary geographic boundary:

1) The HCA reading program is rigorous and grounded in scientifically-based reading instruction; uses the research-based and proven Riggs phonics program; will have 160 minutes of reading instruction throughout the day (vs the common 90-minute block); and will be supported by experts from BCSI, the Children's Learning Institute at UT Health Science Center, and the Neuhaus Center.
2) The instruction in Latin root words beginning in grade 4 and formal Latin instruction in grades 6-8 will enhance students' academic vocabulary and be a springboard for learning other Romance languages.
3) The Singapore Math program, based on sequential mastery, has yielded exceptional results in many school settings, and HCA will allocate 100 minutes of math instruction throughout the day vs the common 90-minute block.

4) The Core Knowledge Sequence for history, geography, science, art, and music provides students with a thorough grounding in these important subjects.
5) The use of primary source materials – documents, documentaries, videos of actual speeches, will be a very engaging approach to teaching history.
6) HCA is committed to providing the support necessary for English Learner (EL) and SPED students. We will staff a Special Education Coordinator; part-time special education teacher; two bilingual teachers; and an EL Specialist from day one.
7) HCA will have a longer school day – 30 minutes K-5 and 1 hour 6-8; a one-week longer school year beginning in Year 2; and subsidized after school and, when funding becomes available, summer programs.

Demographic Assumptions. HCA has elected to develop a school that is diverse by "nature" – by positioning the school in a neighborhood that will attract a diverse student body. Longitudinal and recent research on academic achievement among ethnic groups in desegregated settings is compelling: there is a modest positive effect on African American students' achievement, particularly among younger students; there is recent evidence that suggests positive growth for LatinX students in desegregated schools; and there is no measurable impact on test scores for White students. (553 Social Scientist as Amici Curiae in Support of Respondents, Supreme Court Brief 0f-908 and 05-915, pages 7-8, referenced in a *Diverse by Design: These Charter Schools Show What Integration Looks Like and Why It Matters for Kids, Education Post, Samuelson, Nov. 2017*). Samuelson states: "Diverse learning environments contribute both to stronger academic outcomes for all students – including reduced achievement gap -- and to greater access to social capital and cohesion, as well as empathy and understanding across lines of differences." HCA has developed a model that serves ALL students equitably and creates a learning rich environment leveraging the diverse backgrounds of the populations in the community. To achieve this diversity given its proposed location, HCA will develop a recruiting program that has: 1) extensive outreach to low-income communities whose residents may not be familiar with a classical education to ensure that we reach our target of 76% FRL; 2) extensive outreach into African-American, Hispanic, and Asian communities for racial diversity composition; 3) partnering with community centers, churches, and organizations such as the Boys and Girls Club that serve low-income students of color to communicate the educational opportunity HCA can provide. HCA will also reach out to organizations like Summerhouse (https://summerhousehouston.org/) to identify families who may have or know of students with special needs to honor HCA's commitment to serve SPED students well.

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.**

Attendance Boundary	**Primary Attendance Boundary** (*if applicable*)
Aldine ISD	Aldine ISD
Cypress-Fairbanks ISD	Houston ISD
Houston ISD	Spring Branch ISD
Klein ISD	
Spring ISD	
Spring Branch ISD	

Number of charter school campuses currently operating within the occupied district:	48*
Number of traditional school campuses currently operating within the occupied district:	280**
Number of traditional school districts within ten miles of the proposed location:	4***

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?	Yes ☒ No ☐

School Name(s):

Given no new school data was released in 2019-20, the following is a list of schools that had unacceptable performance (D/F) in the 2017-18 and 2018-19 school year. ****

School Name	17-18 Rating	18-19 Rating
Highland Heights El	58 (F)	64 (D)
Williams Middle	59 (F)	58 (F)
Clifton Middle	65 (D)	67 (D)
Smith El	65 (D)	59 (F)
Wesley El	66(D)	62 (D)
H S Ahead Academy	55 (F)	53 (F)

*** http://mansfield.tea.state.tx.us/tea.askted.web/forms/home.aspx**

**** https://txschools.gov/districts/101912/school-list**

***** https://tea.texas.gov/texas-schools/general-information/school-district-locator**

****** https://txschools.gov/districts/101912/school-list**

Enrollment Projections

1. Applicant proposes to open only **ONE** campus by Year 5?	Yes ☒ No ☐
2. Applicant proposes to open **MULTIPLE** campuses by Year 5?	Yes ☐ No ☐

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	0	0	0	88	88	88
PK 4	0	0	88	88	88	88
K	96	96	96	96	96	96
1	96	96	96	96	96	96
2		96	96	96	96	96
3			96	96	96	96
4				96	96	96
5					100	100
6						100
7						100
8						100
9						
10						
11						
12						
Total enrollment	192	288	472	656	756	1056
For the projections below, specify by campus						
Students per classroom	24	24 K-2	22 PK4, 24 K-3	22PK3-PK4, 24 K-4	22PK3-4 24 K-4; 25 GR5	22 PK3-4 24 K-4 25 5-8
Number of classrooms	8	12	20	26	30	42

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.

	First Charter Campus	Occupied District	Contiguous District 1	Contiguous District 2
Name	Heritage Classical Academy	Houston ISD	Spring Branch ISD	Aldine ISD
African- American	16.6%	22.7%	4.8%	22.2%
Hispanic	65%	62.4%	59.3%	73.4%
White	12.6%	9.2%	26.6%	2.2%
American Indian	0.3%	0.2%	0.3%	0.3%
Asian	3.9%	4.2%	6.5%	1%
Pacific Islander	0.1%	0.1%	0%	0.2%
Two or More Races	1.5%	1.3%	2.4%	0.8%
Economically Disadvantaged	75.5%	79.3%	59.4%	87.9%
English Learners	36.3%	34%	36.7%	38.3%
At-Risk	64.8%	65.3%	55.6%	73.4%
Gifted/Talented	9.9%	15.5%	9.9%	4.4%
Special Education	10.2%	7.9%	9%	8.8%

Data Sources:
Houston ISD: **https://tinyurl.com/HoustonISDreport**
Spring Branch ISD: **https://tinyurl.com/SpringBranchISDreport**
Aldine ISD: **https://tinyurl.com/AldineISDreport**

Community Engagement

(This section adapted from the Community Engagement Section pages 22 to 25 in the HCA Gen 25 charter application.)

Board Member Input Related to Community Engagement

Board members have been engaged in every aspect of both planning and executing the community engagement plan. The talented team, led by Board members Debra Schindler and Kathryn van der Pol, designed the logo, flyers, ads, public notices in the Houston Chronicle, social media content, and the meeting protocols. Board member Chelsea Collins developed and delivered the PowerPoint presentation at two outreach meetings on December 5, 2019 and January 11, 2020. Ms. van der Pol and a small team of contract workers put out 3,000 door hangers at homes in four targeted zip codes. Ms. Schindler and a team member met with six early childhood center leaders. Stuart Saunders, Board President, and other Board members met with public officials as part of the community engagement process. Given COVID, on January 11, 2021, HCA held a Tele-Town Hall for families in the proposed geographic area and attracted 229 individuals who stayed on the call at least five minutes to hear the presentation; and 99 individuals who stayed on for ten minutes (see page 182 in **Attachment 4**). The 30-minute format was a 10-minute presentation that repeated three times with an opportunity throughout for Q and A.

Selection Process for Strategies That Were Implemented

The HCA Board members reviewed successful charter school applications, discussed strategies with Colleen Dippel, Executive Director of Families Empowered, talked to State Board of Education (SBOE) members, and examined district and charter data in Northwest Houston, the proposed school location, to assess community demand for a new classical education charter school. They learned that many families in underserved communities, particularly Hispanic families, do not attend public outreach meetings, and although most families have smart phones, many do not have email and internet at home. Based on their research and understanding of engagement barriers, the Board developed a comprehensive approach to assess community demand that included eight strategies:

1) a comprehensive phone survey conducted by Families Empowered between June 3 and June 29, 2019 with 309 families (see **Attachment 4** pp. 154-174) for the results of the survey) to assess demand;

2) individual discussion with community leaders in Northwest Houston including 9 pastors, 9 business owners, and 2 nonprofit organizations;

3) two public outreach meetings in December 2019 and January 2020, publicized in the Houston Chronicle (see **Attachment 6** pp. 200-209 for published notices) as well as local papers, radio, and online community calendars, with a PowerPoint presentation and question protocol to elicit feedback that were attended by 103 individuals (See **Attachment 4** pp.136-153; 176-184);

4) speaking engagements at meetings with community leaders such as the

Houston Business Network (HBN) and the Professional Women's Exchange Group;
5) visits to six early childhood programs in the area by Debra Schindler, Board member, and Sharon Griffin, employee of Genesis BCS;
6) a presence on social media that is accessible on smart phones such as the school's website (www.heritageclassicalacademy.org) Facebook, and Instagram through which interested persons can ask questions and comment;
7) placement of 3,000 door hangers on homes in four of the targeted zip codes;
8) distribution of over 1,000 flyers written in English and Spanish in local businesses, nonprofits, 26 community centers including Acre Homes Community Center and the Community Multipurpose Center on W. Montgomery, 11 churches, six day-care centers, two local libraries, the YMCA, coffee houses, nail salons, fitness centers, and an urgent care facility. (See **Attachment 4** pp.175 for a more comprehensive list);
9) Flyers emailed directly by Families Empowered to families in the targeted zip codes;
10) Postcards mailed to a list of 900 parents of 3- and 4- year olds in four targeted zip codes.

Families Empowered Survey (Attachment 4, pp.154-174)

To determine demand for a classical charter school in two potential areas, Northwest and Southwest Houston, the leaders of HCA commissioned Families Empowered (FE) (https://familiesempowered.org/), a nonprofit organization that supports families looking for good school options, to conduct a phone survey by bilingual support specialists using general questions about charter school options and specific questions about a classical school model. Between June 3 and July 29, 2019, FE surveyed 309 randomly selected families in 16 zip codes with the following demographics: 76% had an annual household income less than $50,000; 87% were Hispanic; 6% were African American; 68% had children attending a school with a Great Schools rating (https://www.greatschools.org/) of 5 or less on a scale of 10. Seventy percent of families surveyed felt like they had few or no good school options available. When asked what was most important to them in looking for a school, 44% said strong academics, 23% said great teachers and administrators, and 21% said effective discipline policies.

Considerations for Any Barriers to Engagement for Families

Understanding that many families work during the day and some on Saturdays, HCA planned two public outreach meetings to accommodate working schedules: one from 6 to 8 p.m. on a weekday and one from 9:30 to 11 a.m. on a Saturday. The event venue, White Oak Conference Center, is an attractive, parking- and child-friendly facility that is centrally located to the targeted zip codes. A game area was provided for children and a Spanish translator was present.

Parent and Community Involvement in HCA

The founders of HCA understand the critical role of parents and sought their input first through a comprehensive survey in partnership with Families Empowered. As stated above, the survey reached a diverse group of parents in the targeted area (See **Attachment 4**, pp. 154-174 for the complete survey summary). In addition to learning what was important to families when looking for a good school, HCA obtained information useful for planning: 59% of families said they needed before and after school care; 77% said they value learning a classical language, such as Latin; 99% valued phonics instruction; 97% valued instruction in moral virtues; and 73% valued the teaching of classics such as Dickens and Shakespeare. Once the classical education model was explained to them, 97% of those surveyed indicated that they were interested and would like to learn more about a classical education option for their children. This valuable survey data from prospective parents played a major role in shaping the HCA education program and confirmed that parents in the proposed area view a classical education as an asset.

The founders also reached out to community leaders who indicated an interest in the school and posted HCA flyers in over 35 organizations in Northwest Houston (See Attachment 4, pp 175 for list). Wayne Norden, President of Near Northwest Management District, Reverend Paul Dirden, Associate Pastor of Mt. Canaan Missionary Baptist Church. Paul Woodward, Houston Impact Church of Christ, and Dee Farino, President of the Greater Heights Area Chamber of Commerce, and Amy Peck, Houston City Council Member, District A, sent letters of support that are in **Attachment 4**, pp. 185-190.

Partners in Planning and Establishing HCA

HCA is fortunate to have significant support from partners who will provide valuable services and support to the new school (See **Attachment 9**, pp. 245-256 for letters of support):

- Hillsdale College's Barney Charter School Initiative (BCSI) provides standards and guidelines for a classical education, annual Board and teacher training and general support, and has been instrumental in the development of HCA. BCSI will also provide ongoing support through training for its Board, leadership, and teachers, and curriculum and instruction development that is valued at $250,000 over several years in pro bono services;
- Houston Baptist University will provide student teachers, support in identifying primary source documents for the history curriculum, speakers to inspire HCA students, and will co-develop a teacher training program in classical education;
- The Neuhaus Center will train one teacher per grades K-2 in the summer of Year 2 in its approach to diagnose and effectively treat dyslexia, and will provide tutors in exceptional cases;
- Region IV Service Center will provide SPED training for teachers and diagnostic assessment services;
- YMCA has an outstanding new program that will support the school with an after-

school program, provide discounts for staff and perhaps parents at its nearby facilities, and deploy a mobile app that can help participants track their fitness record;

- Children's Learning Institute will provide training in scientifically-based reading instruction, diagnostic and progress monitoring assessments, and the MTSS intervention process;
- APQC will provide training in effective meetings, systems thinking, and process improvement.
- Buckeye Partners LP will provide mentors and lessons on business.
- Jonett Miniel, Educator Certification Manager, Harris County Department of Education, will provide advice about educator certification;
- Carolyn Means, independent education consultant, will provide advice and counsel;
- Beverly Smith, Founder and Board Chair, Harbor Christian Academy, will provide guidance on instructional strategies in a classical education model for low-income African American children.

Communication to Date with Public Officials

The following meetings took place between HCA Board members and public official between 10/30/19 and 12/9/2021: 1) Stuart Saunders and Kathryn van der Pol met with SBOE member Donna Bahorich in Houston on 10/21/19; 2) on 10/24, Stuart Saunders attended an event and had discussion with Lt. Governor Dan Patrick and Senator Larry Taylor, Chair of the Senate Education Committee; 3) Stuart Saunders, Kathryn van der Pol, and Debra Schindler met with SBOE member Barbara Cargill in Conroe on 10/30/19; 4) on 11/14/19, Stuart Saunders attended Board of Education meetings in Austin where Sue Melton-Malone introduced him to Lawrence Allen, Matt Robinson, Keven Ellis, Tom Maynard, Patricia Hardy and Pam Little; 5) on 12/1/2020, Stuart Saunders, Kathryn van der Pol, and Mano de Ayala met with SBOE member Will Hickman in person at a Starbucks on Memorial Drive near Wilcrest; 6) on 12/2/2020, Stuart Saunders, Mike Feinberg, and Kathryn Van der Pol met with SBOE member Lawrence Allen via ZOOM; 7) Debra Schindler Boultinghouse met with Dr. Jennifer Blaine, Superintendent of Spring Branch ISD, on May 22, 2020 via ZOOM and again on December 9, 2020 accompanied by Mano DeAyala also via ZOOM; Kathyrn van der Pol met with Amy Peck, Houston City Council Member, District A in December 2020. **Attachment 5**, pp. 191-199 verifies that HCA has complied with all requirements in notifying the SBOE and state legislators as well as the superintendents and Board presidents located within the school's proposed geographic boundaries.

Public Meetings

Two public meetings were held to discuss HCA. The first was on Tuesday, December 3rd from 6 to 8 pm at White Oak Conference Center, 7603 Antoine Drive, Houston, TX 77088. The following Board members were in attendance: Stuart Saunders, President; Kathryn Van der Pol, Secretary; and Richard Hendee, Treasurer; Debra Schindler and Chelsea Collins. At this meeting, a total of 46 people attended, including nine families with multiple school age children with 8 of those children in attendance. The crowd was diverse and

was approximately 20% Hispanic, 15% African American, 5% Asian and 60% White. The format was a PowerPoint presentation by Chelsea Collins, Board member, followed by a question period that lasted over one hour involving all Board members using a meeting protocol to gather feedback. Total time for the meeting was 90 minutes. Snacks consisting of protein bars, chips and water were provided.

The second public meeting was held on Saturday, January 11 from 9:30 a.m. to 11 a.m., also at White Oak Conference Center. Board members in attendance included: Stuart Saunders, President; Kathryn van der Pol, Secretary; Richard Hendee, Treasurer; Debra Schindler, Mano DeAyala, and Chelsea Collins. The Saturday date brought out a larger crowd of 57 total attendees including an estimated 15% Hispanic, 10% African American, and 70% White. Close to 20 different zip codes were represented: 53% lived within 30 miles of the meeting space, 37% within 15 miles, and 10% within 20 miles. The format was a PowerPoint presentation by Chelsea Collins followed by a question period involving all Board members using a meeting protocol to gather feedback. Total time for the meetings was 90 minutes. As a courtesy, snacks consisting of breakfast tacos, donuts, juice, coffee and water were provided. Given COVID restrictions in 2021, HCA elected to hold a Tele-Town Hall on January 11 and 229 households attended for at least 5 minutes. (See page **Attachment 4**, pp. 182 for more detail.)

Outreach efforts to boost attendance for both public meetings were consistent, extensive and successful, as evidenced by solid attendance rates, and included the following: 1) a well-designed flyer in English and Spanish announcing the meeting was emailed by Families Empowered to all the families who participated in the survey and additional families on their waiting list in the proposed zip codes (approximately 1500 families); 2) the same flyer was also posted in an estimated 3,000 churches, businesses, and nonprofits in the area; 3) an ad was placed in the Houston Chronicle, a local paper, online local calendars, and local radio spots 10 days prior to each meeting; and 4) the announcement of the meeting was posted on Facebook and Instagram.

Attachment(s)

4: Evidence of Community Demand
5: Certified Mail Receipt Cards; 6: Published Notice(s) of Public Meeting

School Design

Mission, Vision, and Overview of School Design

(This section adapted from the Mission, Vision and Overview of School Design section pages 26-29 in the HCA GEN 25 charter application.)

Mission
HCA will provide a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom and character to a state of virtue and by preparing them as well-educated, self-governing citizens and leaders for the next generation of America.
Motto: Sapientia et Virtus: Wisdom and Virtue

Vision. The goal of a young person's education should be to train the mind and heart to be prepared to make the best life possible for one's self and others. HCA's vision is to train each student to be both a thinker and a doer; to be a person whose senses are well developed; to be a person who adjusts well to a changing world and can be innovative and creative but knows that there are timeless principles worth preserving; to be a person who is self-governing, self-directed, and self-disciplined. We want to shape young people who are thoughtful and empathetic, but decisive and proactive. We want HCA students to be courageous, faithful to principles of excellence, and to be seekers of the good and the true. We believe that this person will be a wise, virtuous, confident, and productive person, well-positioned to lead a happy life while contributing to his or her community.

With an education from HCA, our graduates will enter the world prepared and knowledgeable for whatever challenges life may hold for them. They can seek a college education or career in technical training and excel in either path. Our graduates will be such good learners and so well-prepared that they can be productive in the market, good citizens and neighbors, and love liberty and the life of the mind. They will become lawyers who love geometry and plumbers who can quote Aristotle.

Core Virtues. The Board members have also defined the following seven Core Virtues, derived from Aristotle's Nicomachean ethics and adapted from two BCSI schools in Colorado: Golden View Classical Academy and Ascent Classical Academy of Douglas County. These virtues will guide the development of the school culture that will be created and embodied by members of the HCA community. They will be explicitly taught, discussed, and modeled by faculty and staff.

Citizenship	Engage in civil discourse.
Courage	Practice grit and perseverance when the task is difficult.

Justice	Practice being fair. Be helpful and treat others with respect.
Moderation	Manage your desires and emotions. Practice self-control.
Prudence	Think before you act. Practice being deliberate.
Responsibility	Hold yourself accountable to fulfill what is needed of you.
Wisdom	Seek to know the good, the true. and the beautiful.

Development of HCA's Mission, Vision, Motto and Virtues. Mission, motto, vision, and core virtues were first drafted in September 2019 by the Board President, Stuart Saunders and Secretary, Kathryn Van der Pol, and then circulated among the Board members via email. In addition, these important statements were discussed at five Board meetings, 10/21/19, 11/1/19, 11/13/19, 11/16/19, and 1/6/2020. These statements went through eight iterations until the Board approved them on January 6, 2020. This mission and vision have since been refined with input from external stakeholders and community members. The board meets consistently to ensure that the direction the school is designed to is aspirational and reflective of the community's and board's goals. The mission and vision will continue to be the north star while remaining open for iteration as key stakeholders deem necessary.

Key Design Elements. HCA's education model is derived from the BCSI classical education approach and TEA's Effective Schools framework (https://texasesf.org/framework/), as well as the Effective Schools Correlates developed by Larry Lezotte (*Re-Envisioning Effective Schools Correlates*, Lezotte and Snyder, 2016). HCA is collaborating with BCSI in the design and execution of its education model. Given BCSI's existing partnerships with schools, its experts have developed and refined a rigorous program based on extensive research in each instructional area that meets the needs of diverse learners. Aligning the BCSI model with the TEA Effective Schools framework and Lezotte's Effective Schools correlates, HCA has developed key design elements for its proposed charter school:

- Strong instructional leaders use a continuous improvement approach to plan effectively;
- Outstanding, well-supported and well-trained teachers hold high expectations for ALL students;
- Effective data-driven instruction with frequent progress monitoring allows for differentiated instruction using multiple instructional modalities, such as the Socratic method of inquiry, and helps all students achieve mastery of the essential knowledge and skills;
- An orderly and safe learning environment with a positive school culture promotes learning;
- A high-quality curriculum grounded in the classical liberal arts promotes critical thinking, the ability to discourse in a civil manner, and a love of learning;
- Systematic character development and opportunities for service prepare scholars for the best life possible for one's self and others;

- Positive home/school relations and parent engagement support student success.

Student Outcomes. Given our educational model, we have a high degree of confidence that students at HCA will graduate with the following abilities and attributes:

Knowledge towards a State of Wisdom:

- Ability to read with comprehension and fluency, write and speak effectively, and to develop a life-long habit of reading, inspired by the outstanding literature studied at HCA;
- Fluency in the language and beauty of mathematics and the ability to use it in academics and life;
- Knowledge of the principles and concepts in science as a foundation for understanding and appreciating the physical world and as a preparation for a career in the sciences if desired;
- Knowledge of history and geography and a deep understanding of the founding principles of the American republic, leading to a desire for civic engagement;
- Knowledge of Latin, leading to a better understanding of grammar and fluency in other languages;
- Ability to analyze complex information, derive truth, and discourse about ideas in a civil manner;
- Appreciation for beauty and the arts and the ability to participate in visual and/or performing arts;
- A commitment to physical fitness and a healthy lifestyle;
- Ability to succeed in postsecondary and career and to lead a fulfilling life.

Character toward a State of Virtue

- Deep understanding and embodiment of the seven enduring HCA moral virtues;
- A commitment to excellence in every endeavor;
- A commitment to live with honesty and integrity;
- Respect for self and the dignity of every human being;
- Self-governance, self-awareness and positive self-esteem;
- Empathy for the condition and needs of others and a desire to serve.

Differentiating Factors. HCA will be the *only* public school -- traditional and charter -- offering a classical education in Northwest Houston. In addition, HCA will offer several distinguishing innovations (adapted from the BCSI model application document):

1) HCA will have a strong emphasis on scientifically-based reading instruction including Riggs explicit phonics to ensure mastery of reading by third grade with partnerships as needed with the Neuhaus Center (working with students with dyslexia) and the UT Health Science Center Children's Learning Institute (providing training in the use of diagnostic assessments and scientifically-based reading instruction).

2) All students in grades four and five will be introduced to Latin roots which have been demonstrated to improve reading comprehension and vocabulary and to bolster

performance in all subjects; formal study of Latin will begin in grade six.
3) Middle school students will study history mainly through primary source documents to foster analytical skills and essential insight into their culture and HCA.
4) All students will be trained in study skills, such as time management, organization, and note taking, that are essential for building stamina for further academic pursuits.
5) The program will consistently and directly teach, model, and give opportunities to students to practice the HCA seven core virtues of character.
6) A part-time science specialist will be employed, beginning with grades K and 1, and will conduct lab experiments, engaging students early to become interested in STEM fields.
7) HCA has a partnership with Houston Baptist University to provide student teachers and to co-develop a teacher training program in classical education to enable the scaling of these schools in Texas.
8) HCA will partner with APCQ to develop a continuous improvement model for instructional, financial, and operational planning and execution.

While some schools may adopt parts of what is listed above, including partnerships with Universities or second language acquisition, HCA is innovative because of the combination of the factors listed above in conjunction with the high-quality, classical education. Given the systems and structures put into place by the board, including the strong talent that will be engaged, this school will serve as a strong public option for families that does not currently exist in Northwest Houston.

Because HCA plans to attract a socio-economically and racially diverse student population, it is developing an external advisory committee that will include community members, staff, parents, students and several board members to conduct an annual cultural relevance audit of all of the curriculum and instruction. BCSI is also committed to conducting an audit of its guidelines and curriculum materials on an annual basis to ensure appropriate racial representation in any recommended materials.

Curriculum and Instruction

(This section adapted from the Curriculum and Instruction section on page 29-42 in the HCA GEN 25 charter application.)

Overview of the HCA Curriculum. HCA is developing its curriculum and instructional approaches in collaboration with Hillsdale College's Barney Charter School Initiative (BCSI), mapping carefully all curriculum with the Texas Essential Knowledge and Skills (TEKS). BCSI is currently supporting more than 20 charter schools at no charge. HCA is the only school BCSI partner school that would open in 2022. Overall results in these schools based on 2017-18 data are strong, with 82% of the schools exceeding state averages on ELA proficiency and 52% exceeding state averages by 20% or more; and 64% exceeding state averages on Math Proficiency and 29% of the BCSI schools exceeding state Math proficiency averages by 10% or more. In carefully analyzing the data, HCA made two important decisions: 1) begin only with grades K-1 to develop strong foundations in literacy and numeracy that will carry our scholars through their years of formal education; and 2) develop partnerships with organizations with expertise in reading to ensure that HCA will equitably serve all students representing the diversity of the proposed community.

In developing the curriculum and instructional approaches for HCA, the Board members decided to begin with the end in mind. As Yogi Berra so aptly stated: "If you don't know where you are going, you will end up some place else." Therefore, the curriculum and instruction have been carefully designed to achieve specific outcomes for students, following carefully the TEKS while providing a rich and rigorous classical education.

Knowledge to a State of Wisdom

Student Outcome, Literacy: *Ability to read with comprehension, write and speak effectively, and to develop a life-long habit of reading, inspired by the outstanding literature studied at HCA.*

Reading. There is perhaps no other area of education that has as much rigorous scientific research as reading (National Reading panel [NRP]. 2000). The five basic components of scientifically-based reading (SBRR) instruction are: phonemic awareness, phonics, vocabulary, fluency and comprehension (Foorman *et al*., 2016; NRP, 2000; Shanahan *et al*., 2010). Students in K-1 initially and then K-3 will have 160 minutes in daily literacy and receive direct, multisensory and Socratic instruction from well-trained teachers using the Riggs Institute's *The Writing and Spelling Road to Reading and Thinking*. The basic curriculum covers listening, speaking, initial letter formation, complete phonetics, spelling (with 47 rules of spelling), plurals, grammar, syntax, punctuation, capitalization, vocabulary development, analytical and inferential thinking plus cognitive development in auditory,

visual, verbal and motor areas of the brain. (Description of Riggs Institute curriculum based on research of Joyce/Showers).

To support students who may be struggling with reading, the Riggs program uses a structured literacy approach based on Orton-Gillingham and Spalding methods (Alexander & Slinger-Constant, 2004 and Spear-Swerling, 2019), as do the programs from the Neuhaus Center, our Houston-based partner. The Riggs program comes with 71 phonogram cards and audio CDs, useful for ELs, for explicit phonics instruction (teaching the phoneme/grapheme relationship in isolation; Riggs Institute). The Riggs program teaches 71 letter-sound (phonogram) combinations used in the English Language, beginning with the easiest sight-to-sound correspondences and working toward those that are more complex. Syllabication is critical to the proper understanding and application of decoding, specifically for reading polysyllabic words, so the Riggs program teaches syllabication from the beginning of Kindergarten. Scientific evidence supports a strong foundation in phonemic awareness, phonics, decoding, and spelling (NRP, 2000; Foorman *et al*., 2016; Seidenberg, 2017; Steubing, Barth, Cirino, Francis, & Fletcher, 2008).

As students develop mastery of the relationships among phonology (sounds), orthography (spelling), and morphology (meaning), they must build proficiency, automaticity, and fluency with these skills while at the same time improving their listening comprehension abilities. By laying these foundational literacy threads, our reading framework will provide students with the means and motivation for comprehending a variety of texts (Foorman *et al*., 2016; Scarborough, 2001; Shanahan *et al*., 2010).

Both word recognition, which will be developed through Riggs program implementation, and language comprehension are essential to skilled reading. Language comprehension consists of building students' background knowledge, vocabulary, knowledge and use of various linguistic structures, verbal reasoning, and literacy knowledge. To address these components, each classroom will be an inspiring environment rich for literacy development: classroom libraries of the best children's literature in English and Spanish; wall charts; manipulatives to practice word development and spelling; and reading nooks. Some of the books recommended in the BCSI guidelines that students in K-1 will experience are *Children's Book of Virtues; American Tall Tales; Listen, My Children; and Aesop's Fables*. These are often read-alouds with the teacher, and BCSI has an additional list of recommended books for guided student practice. All books used in curriculum and in libraries will be assessed for equity and cultural relevance by teachers, leaders and community members.

The central position of language in the curriculum continues through elementary and middle school grades. Recent research supports the teaching of morphological knowledge and awareness, including prefixes, inflected and derivational suffixes, and Latin and Greek roots (Apel, Brimo, Diehm, & Apel, 2013; Zoski, Nellenbach, & Erickson, 2018).

Additionally, the Texas Essential Knowledge and Skills (TEKS) in Reading require students to learn to apply this knowledge to read and understand vocabulary encountered across various types of texts. Therefore, starting in grades 4 and 5, students will learn Latin and Greek roots of English words. In sixth grade, students begin formal Latin instruction and will continue Latin through 8th grade. Latin is introduced and taught alongside English so that students learn the structures underpinning of their own language, expand their vocabularies, and improve their reading comprehension. While Latin has often been seen as an elitist and forgotten language, this methodology will empower the diverse population of students HCA will serve so that they are able to develop extensive vocabulary and thrive intellectually.

In addition to continuing to develop word knowledge, structural analysis, and morphological awareness, teachers will continue to help students become increasingly automatic readers. In fact, starting in Grade 1 and extending through Grade 8, the Reading TEKS state that students should use appropriate fluency, including elements such as rate, accuracy, prosody, and adjusting based on reading purpose, in grade-level text. Students develop automaticity and fluency with reading by building their sight-word vocabularies through the process of orthographic mapping (Kilpatrick, 2016). This mapping occurs through explicit instruction as provided in the Riggs program and through other activities like explicit spelling instruction, practice in reading words in and out of context, and oral reading activities like echo reading, repeated reading, partner reading, and timed reading.

Research related to effective language comprehension demonstrates students need to learn and practice building effective useful background knowledge, activating word meanings, understanding and linking sentences, making inferences, monitoring comprehension, and using text structure (Elbro & Buch-Iversion, 2013; Poulsen & Gravgaard, 2016).

In addition to these thinking skills, students need to become more and more strategic in how they approach and learn from a variety of texts, including both literature and content-area texts (Scarborough, 2001; Shanahan *et al*., 2010). The Reading TEKS stress the importance of students developing these comprehension skills starting in Kindergarten and extending through the high school grades; therefore, our teachers will provide daily comprehension lessons using a variety of texts, including different types of fiction, poetry, drama, informational texts, argumentative texts, and multimodal/digital texts. Students will be expected to analyze the author's purpose and craft to both improve their comprehension and learn to apply different linguistic techniques in their own writing.

Because the ability to read well is crucial for **ALL** HCA scholars to succeed in our classical curriculum, HCA teachers will be trained by staff from the Children's Learning Institute and will work within a Multi-Tiered System of Supports (MTSS) framework. The essential components of MTSS are research-based core instruction; evidence-based interventions;

use of reliable, valid assessments to make instructional decisions; and ongoing teacher professional development (PD) and support. Our core reading instruction will incorporate SBRR components as described previously. For students who demonstrate more intensive needs in reading, Tier II and Tier III interventions will be provided outside of the core reading time. Tier II supplemental interventions will consist of additional, targeted instruction focused on addressing identified deficits. Students who are significantly behind and/or have been diagnosed with dyslexia or other reading challenges will receive Tier III intervention. HCA teachers will be trained by the Neuhaus Center to identify and address dyslexia. The school will also utilize Neuhaus tutors to diagnose and address dyslexia as needed. As a reading supplement, and in part to satisfy the TEKS in technology, students in grades 1-3 will have access to Istation, a digital program in English and Spanish that has shown significant effects on Kindergarten literacy skills (*Technology Versus Teachers in the Early Literacy Classroom: An Investigation of the Effects of Istation*.)

Assessments will include screening, diagnostic, and progress-monitoring measures including TX-KEA, TPRI, Acadience Reading and Spelling Inventories and Quick Phonic Screeners for the appropriate grade level and purpose. Screening of all students will occur at Beginning of the Year (BOY), Middle of the Year (MOY), and End of the Year (EOY). Data at each of these timepoints will be used to identify students in need of additional support through teacher-led small groups in core instruction and through Tier II and Tier III interventions. Diagnostic data from these measures (*e.g.*, reading and spelling errors) will give teachers specific areas to target during these more intensive lessons. For students whose progress teachers want to check more regularly (*e.g.*, students receiving intervention), progress-monitoring measures will be administered at least every two weeks. Faculty and staff will meet regularly to analyze these data and evaluate whether instruction is accelerating student learning and closing learning gaps. While the data analyses at the individual student level will inform targeted instruction to be provided, analyses at the campus, grade, and classroom levels will identify teacher needs to be addressed through face-to-face training, observations with feedback, and lesson modeling and coteaching.

Writing. A key element of a classical education is ensuring that the graduates are excellent writers through years of writing frequently in a variety of genres – essays, book reports, fiction, research papers, poetry, etc. – and a thorough grounding in correct grammar. In grades K-2, the HCA literacy program will teach students the basics of sentences (parts of speech, basic construction, capitalization, and punctuation). In third grade, our program will begin more intensive grammar with *The Well-Ordered Language*. Students should finish 3rd grade with an understanding of and practice in writing paragraphs. By fourth grade, students will begin to master the use of multiple paragraphs; by fifth and sixth grade, students will write four and five paragraph essays. In grades 7 and 8, students will begin to master broader elements of composition, including outlining and the use of citations. During these years, students will also be engaged in creative

writing – short stories and poetry, often illustrating their own work. HCA will also utilize tools and resources for teachers from *Access Literacy* to teach orthography – the conventional spelling system of a language. The Riggs program includes extensive practice in developing vocabulary that students will use in their weekly writing assignments, as well as a method to enable students to learn handwriting, including cursive handwriting. Students will also have access to an engaging, supplemental digital program, *Handwriting Without Tears*.

In addition to instruction in these foundational writing skills, teachers will implement *Writers Workshop* to teach the writing process through modeling and guided and independent practice in developing authentic pieces across various genres. Students will practice writing for a variety of purposes and audiences. Lessons will include the use of model texts, think alouds, shared writing, and explicit teaching of strategies for prewriting, planning, organizing, drafting, revising, and editing. Writing assignments will be graded by teachers beginning in third grade, increasing in complexity as the scholars move through middle school. By eighth grade, students will write research papers requiring analysis, footnotes, and references.

Reading for ELs. Baker et al. (2014) make several recommendations for supporting ELs in learning academic content and literacy:

- Teach a set of academic vocabulary words intensively across several days using a variety of instructional activities;
- Integrate oral and written English language instruction into content-area teaching;
- Provide regular, structured opportunities to develop written language skills;
- Provide a small-group instructional intervention for students struggling in areas of literacy and English language development.

In addition to these recommendations, HCA teachers may differentiate instructions by assigning a shorter adaptation of a classic work of literature or assigning an audiobook; making regular tutoring available with a bilingual tutor; modifying assignment to fit a student's language ability, such as an oral exam instead of a written one. During core reading and other content areas – science, math and social studies – essential vocabulary will be taught explicitly using student-friendly definitions, synonyms/antonyms, examples/nonexamples, visuals, and/or graphic organizers. Teaching students morphological structures, such as Latin and Greek roots, will also help students see relationships among content-area words and develop a strong neural network of vocabulary to use across a variety of contexts, including reading, writing, listening, and speaking. Students can also use their morphological knowledge in combination with other strategies (e.g., using context clues) to independently learn the meaning of new words encountered in their content-area reading.

Across all content areas, teachers will consider the English language knowledge required within lessons to be implemented. They will identify linguistic elements such as

terminology, syntactic knowledge, and idiomatic knowledge necessary to succeed within specific lessons and explicitly teach these elements. For example, ELs may need more support with general academic vocabulary used within lessons in addition to content-specific academic vocabulary. Teachers will be trained to use instructional tools like short videos, visuals, and graphic organizers to anchor instruction and help ELs and other students make sense of the content to be learned. Other techniques that can support all students' content learning include allowing students to work collaboratively in small groups or pairs to discuss content, providing writing opportunities to extend student learning of the content, having children retell stories such as a Greek myth in rhymed couplets, or set portions of a children's book to beats and rap music.

Within these discussions and writing opportunities, students will be provided language-based supports (*e.g.*, sentence or question stems). Teachers will use these listening, speaking, and writing opportunities to focus on developing students' academic language as well as their writing skills. As mentioned previously, students' writing will be assessed periodically to identify instructional needs and to provide positive, constructive feedback. All teachers will be required to provide teacher-led small group instruction based on students' needs. For ELs struggling in literacy and English language development, this instruction will focus on English linguistic elements (e.g., vocabulary, syntax) and will have students practice implementing this knowledge across reading, writing, listening, and speaking activities.

Public Speaking and Rhetoric. It is well documented that glossophobia, the fear of public speaking, affects many individuals. In Trier Social Stress tests conducted in many settings in the past 20 years, participants who had to speak in front of a three-judge panel showed a substantial cortisol response, a marker of stress. How would one reduce this fear? "Simply getting used to the pressure of public speaking in front of others (and being judged by them), can ease this fear." (https://www.psychologytoday.com/us/blog/choke/201204/the-fear-public-speaking). HCA scholars will practice public speaking beginning in Kindergarten through daily forum time, school events, school community meetings, advisory periods, and public performances. HCA students memorize and recite poetry beginning from the youngest grades and continuing in secondary school. Our curriculum includes famous speeches in both literature and history which will be studied for style and content and, in many cases, memorized.

Literacy Extended to Parents. In our classical education model, it is important for parents to read to their children in the early grades and to signal that reading is a family activity. To this end, HCA will offer ESL classes to parents who need this training and give parents access to quality literature in Spanish and English at various reading levels, including the *You Read to Me, I'll Read to You* books. Initially, these classes will be staffed by volunteers from the community and are therefore not included in the HCA budget. HCA will also

provide family interactive reading experiences and create literacy events such as a book fairs and school visitations from children's book authors.

Student Outcome, Numeracy: *Fluency in the language and beauty of mathematics and the ability to use it in academics and life.*
Singapore Math, a program centered on problem-solving that also emphasizes computational skills and conceptual thinking, was originally developed by Singapore's Ministry of Education in the 1980s in response to low international assessments scores. The program has proven to be remarkably effective: in the 2012 administration of the TIMMS assessment, Singapore ranked #2 and #1 in 2015. Numerous countries have since adopted some form of the Singapore curriculum. One study in England found a small but significant positive effect of using the Singapore materials and teaching approach on pupils' mathematics knowledge and skills after just two terms. (https://www.frontiersin.org/articles/10.3389/feduc.2019.00037/full)

Singapore Math will provide our students with a strong foundation in the skills, concepts and the beauty of mathematics. Beginning in Kindergarten, Singapore Math will use physical and graphic illustrations of underlying mathematical algorithms and procedures to emphasize concepts, strategic thinking, processes, mental math, and number sense – all skills required in the TEKS (19 TAC Chapter 111). The secret to the success of students using Singapore math is that the curriculum requires MASTERY. Students do not progress until they have mastered the material. Therefore, HCA will administer an inventory through the Singapore math program at the beginning of the year and form flexible ability-groups allowing students to progress through the material as their fluency in mathematics progresses. HCA will use Singapore's Dimensions Math for seventh grade for pre-algebra and Weeks and Adkins for Algebra for its eighth-grade students.

To track mastery of the important mathematical skills and concepts, HCA will utilize a free digital tool, Mastery Track (https://masterytrack.org/) that enables teachers to update students' progress towards mastery in a user-friendly dashboard accessible to teachers, students, parents and administrators. To be inclusive of all families, including those without the access or skillset to utilize digital media, math progress will also be shown in weekly take-home folders that must be signed by students' parents and/or guardians. HCA will also provide tutoring as needed and access to a digital adaptive math program, *DreamBox*, to enable additional practice at school and in the after-school program. *DreamBox* has a +1 rating on the IES What Works Clearinghouse.

Student Outcome, Science: *Knowledge of the principles and concepts in science as a foundation for understanding and appreciating the physical world and as a preparation for a STEM career if desired.*
Science instruction often plays second fiddle to other subjects, particularly those that are tested each year through the STAAR test, yet most students find the subject fascinating

and engaging. To counteract this trend, HCA has budgeted for and will employ a part-time science instructor who will provide lab experiments semi-monthly for Kindergarten students and weekly for 1st grade students to support and enliven the instruction of the TEKS provided by the regular classroom teachers.

The Core Knowledge Sequence in Science 2010 provides content-specific, cumulative, coherent curricular guidelines (https://www.coreknowledge.org/our-approach/core-knowledge-sequence/k-8-sequence/) for students in grades K-8. This sequence is augmented by teachers who are trained in the components of the Pearson/Prentice Hall Science Explorer Series, Teachers Editions, and Delta Science Content Readers. Topics that will be covered in grades K-2 in the Science Explorer Series include animals, astronomy, electricity and magnetism, human biology and health, weather and climate, and environmental science, from bacteria to plants, to the Earth's interior, and chemical building blocks. Resources include the Integrated Lab Manual and the Nature of Science and Technology manual. The BCSI curriculum guidelines also include excellent resources for read alouds such as: *The Wright Brothers: Pioneering Aviation*, Quentin Reynolds; *A Man for All Seasons: The Life of George Washington Carver*, Stephen Krensky; and *Jane Goodall*, William Rice. Classroom libraries and classroom word walls, featuring scientific terms and books on science and scientists, will be available in English and Spanish at developmentally appropriate levels for all students.

The Core Knowledge Science Sequence 2019 for grades 3-5 was recently updated to include information from the Next Generation Science Standards (NGSS). This program promotes mastery of the core ideas in life, physical, earth/space science and engineering design; provides experience using the scientific method and scientific inquiry; and connects science to other disciplines. Students master academic language through the theme-based science topics with excellent biographies of scientists who have had a great impact on our understanding of the world and our universe. Students will be inspired by seeing the movie *Hidden Figures* that features Katherine Johnson, NASA mathematician, and studying the life of Steven Chu, Nobel Laureate in physics, or Ellen Ochoa, first Hispanic astronaut. Core Knowledge sequences these science topics to allow for regular repetition of the most important topics, ensuring a strong foundation for our students in scientific principles, knowledge, and lab skills. The Pearson Science Explorer Series will again augment the instruction in science for grades 3-5. BCSI has mapped the Core Knowledge Science Curriculum to the TEKS in grades K-8 to ensure that students at HCA using the Core Knowledge Science sequence are mastering the science TEKS.

Student Outcome, History and Geography: *Knowledge of history and geography and a deep understanding of the founding principles of the American republic with its positive and negative history, leading to a desire for civic engagement and a quest for social and racial equity.*

The basis for the HCA history and geography curriculum will be the Core Knowledge Foundation curriculum and resources, which have been mapped to the TEKS. The K-8 curriculum will instill our scholars with cultural literacy through the study of United States and world geography, as well as history from ancient civilizations, including the founding of America, the World Wars, and modern era events and challenges. In addition to the Core Knowledge Foundation, HCA teachers will have access to the following resources: *The Story of the World* (multiple volumes), Susan Wise Bauer; *A History of the United States and Its People*, Edward Eggleston; *Kid's World Atlas*: *A Young Person's Guide to the Globe*, Karen Foster; *A History of US* (multiple volumes), Joy Hakin; *DK Eyewitness books*; and *A History of the American People*, Paul Johnson.

HCA will ensure that the history and geography curriculum will be culturally relevant to our diverse learners, including our Hispanic students. Over the course of their K-6 years alone, students will engage in a rich and rigorous study of (in grade order) Native American peoples, the Ancient Near East, Modern Mexico, the founding and expansion of Islam, Judaism, Christianity, Ancient Asian civilizations, modern Japan, Chinese dynasties, early and Medieval Africa, the art of Africa, Islamic art and architecture, the art of China, feudal Japan, and the independence movements of Latin America. Our American History curriculum also includes an unflinching examination of the African-American experience, including the slave trade, life under slavery, the Civil War and the African-American experience during Reconstruction, Jim Crow, and the Civil Rights movement. Students will read the words and learn the stories of many important African-American figures, including Martin Luther King, Jr., Frederick Douglass, Rosa Parks, Malcolm X, Barack Obama, Sojourner Truth, and others. Our curriculum gives a similarly thorough treatment in its study of LatinX figures in American history.

Starting in the early grades, HCA uses a storytelling approach in history lessons that includes the use of images – portraits, battle plans, architecture and paintings – to engage the students, often having them act out parts of the story. Events and actions follow chronologically so students can connect cause and effect. Teachers follow up the standard "who, what, when, and where" questions in a lesson with "why, how, why do you think that, and how do you know that?" (Adapted from (https://hillsdale.app.box.com/s/iiz7cm526cwsmi5qy1a4bx0ock630hnw). The middle school HCA curriculum will differentiate itself from that of most schools through its inclusion of engaging biographies, literature, and primary source materials. It is much more interesting to learn about history by reading Lytton Strachey's *Biography of Queen Victoria,* than by reading a synopsis in a textbook. Our students will also have an opportunity to understand the political process by engaging in debates and listening to state and national representatives who will visit the school and encourage student participation in civic activities. HCA will also utilize the free, interactive digital program, *icivics* (https://www.icivics.org/), developed by the former Supreme Court Justice, Sandra Day O'Connor.

To support EL populations in Math, Science and History, all students will receive bilingual services who need it. The curriculum will be scaffolded to ensure that students who are language learners are still able to access grade-level content while receiving additional supports. Furthermore, additional resources will be provided such as access to dictionaries/technology that will support the success of English Language Learners.

Student Outcome, Languages: *Facility in multiple languages, aided by a strong foundation in Latin.*

HCA students will be exposed to Spanish from grades K-5 through school signage in English and Spanish and Spanish instruction from a part-time Spanish teacher once a week and via a free digital language program, *duo-lingo* (https://www.duolingo.com/). In addition, HCA will employ at least one bilingual teacher at each grade level, K-3, who will support the development of English skills in our EL students (see pp. 53-57 for additional information on support for EL students) as well as conversational Spanish for our native English speakers. Our expectation is that HCA students will reach sixth grade with basic conversation skills in Spanish. HCA will utilize the BCSI-developed Latin Sequence and Wheelocks' Latin for grades 6-8. Latin instruction will be a 45-minute period three times per week in grade 6 and five days a week for grades 7-8. The school's longer school day accommodates this. The study of Latin supports the understanding of English grammar and syntax, expansion of vocabulary, particularly in science as many scientific terms have their roots in Latin, and the ability to acquire other Latin-based Romance Languages such as French, Italian, and Spanish.

Student Outcome, Art: *Appreciation for beauty and the arts and the ability to participate in visual and/or performing arts.*

The HCA fine arts scope and sequence will include visual arts, music, theater and dance. The four basic foundations outlined in the TEKS – "observation and perception; creative expression; historical and cultural relevance; and critical evaluation and response" – provide broad, unifying structures for organizing the knowledge and skills HCA students will be expected to acquire (TEKS 117.105). The HCA scope and sequence in the visual arts is based largely on the Core Knowledge Sequence and will enable students to develop knowledge and skills in the elements of art such as color, line, shape, and texture. Resources for the visual arts include*: Getting to Know the World's Greatest Artists,* Mike Venezia*,* and *Children's Book of Art,* DK Eyewitness. HCA will also introduce students to local practicing artists, such as Reginald Adams *(*https://www.reginaldadams.com/), and famous artist such as Jacob Lawrence and Diego Rivera. The Core Knowledge sequence also provides excellent resources that include prints of much of the art history covered in each grade. HCA will budget for and seek a practicing artist who will work in the first two years part-time with the students on drawing, painting, and sculpture, while the classroom teachers cover the Core Knowledge sequence in art history. HCA has budgeted for a full-time art teacher in years 3-5 who will cover both studio art and art history. Students with

special needs will be accommodated through finger painting, clay projects, collages, and emotional drawing (Carol Stanley 2017). A rotating display of student framed artwork in the halls and an annual art show will signal the significance of visual arts at HCA.

The music program will be based on the Core Knowledge Sequence and the basic strands in the music TEKS. "The basic strands – foundations; music literacy; creative expression; historical and cultural relevance; and critical evaluation and response -- provide broad, unifying structures for organizing the knowledge and skills students are expected to acquire." (117.106 Music Grade 1). The HCA music program will enable students' active participation in song, dance, and rhythm instruments to learn the elements of music such as melody, harmony, form, timbre, musical notation, and rhythm. Initially, the school will budget for and hire a part-time music instructor trained in the Kodaly integrated approach to learning music notation and fundamentals, expanding to a full-time instructor by the time the school reaches K-3. The music instructor will have access to the following resources: *Core Knowledge Music Collection* and *Getting to Know the World's Greatest Composer Series,* Mike Venezia.

The hit Broadway play *Hamilton* is an example of how history can come to life through theater. Students in grades K-8 will have the opportunity to participate in multiple dramatic productions, often small scale in the classrooms, acting out historical events. Each winter and spring, post NWEA MAP and STAAR testing, the school will put on musical/theater events that will involve all students in various grades, including those with special needs. Initially, these productions will be developed by classroom teachers and parent volunteers. As the school grows to full-scale, HCA will hire a drama instructor to develop a strong theater program aligned with the TEKS as well as a part-time dance instructor.

Student Outcome, Fitness: *A commitment to physical fitness and a healthy lifestyle*.
A recent meta-analysis study found a "positive linear trend for all definitions of overweight and obesity among children ages 2 to 19-years old, most prominently among adolescents." The study also found that Hispanic and African American children have higher rates of obesity than Whites and Asians. (*Prevalence of Obesity and Severe Obesity in U.S. Children 1999-2016*; Skinner, Ravanbakcht, Skelton, Perrin, Armstrong; Pediatrics 2018).

HCA's CEO/Superintendent, Lower School Principal, Nurse, teachers, and by Year 4 the Chief Academic Officer will design a scope and sequence based on the TEKS standards around movement, physical activity, and social development (TEKS Chapter 116. Subchapter A) and the Core Knowledge Sequence in health to guide the development of a robust program to address the childhood obesity challenge and put our students on a path toward lifelong health and fitness. At full scale, students in grades K-5 will have physical education three times a week and in grades 6-8, each school day. In grades 6-8,

health and physical education will include fitness training, introduction to sports, the concept of teamwork, cooperative games, and competitive athletics. The site selected will have indoor and outdoor space for these activities. To measure growth in fitness, students will be given an assessment through the Presidential Youth Fitness Program (https://www.pyfp.org/) in the Fall and Spring of each year. In addition, the school will provide healthy lunches and snacks and will develop a community garden on the school site. HCA plans to extend health and fitness to the HCA staff and families. In its partnership with the YMCA (Y), HCA will utilize the Y's new program that works with schools to implement an after-school program for children, provides Y discounts to school staff and families, and operates a mobile app that families can use to track their fitness.

Additional Programs Related to the TEKS

Career and Technical Education (Chapter 127, Subchapter A). Through the business partnerships that HCA will develop, such as its first one with Buckeye Partners LP, middle school students will have the opportunity to investigate one or more careers in the 16 career clusters through mentorships, shadowing workers on the job, and possible summer internships. They will also be expected to research the educational and certification requirements for careers that spark their interest, so that they clearly see the link between their efforts in school and future careers. HCA teachers will work with the students on developing professional documents such as cover letters and resumes and perfecting their interviewing skills through mock interviews.

Technology Applications. HCA will have a ratio of one laptop for every six students in grades K-5; and a one-to-one laptop ratio in middle school as students increase their writing and research. HCA students will have early exposure to digital tools through use of Istation, Dreambox, duolingo, and Handwriting Without Tears. All students will become proficient in keyboarding and Microsoft Office tools – Word, PowerPoint, and Excel – and will be able to create and use graphics and data in their presentations to their peers, teachers, and other members of the school community. Students will use search engines and the internet to access information relevant to their studies. Lower school students will have exposure to the concept of coding through tools such as Code-a-Pillar, and middle school students will learn coding through innovative products such as CodeMonkey. HCA will emphasize the importance of digital citizenship and insist on respecting intellectual property and practicing the safe, legal, and responsible use of information technology (TEKS 126.6).

Character to a State of Virtue

Student Outcome: *Students will reflect the core virtues of HCA in their own behavior and their behavior toward others.*

HCA places equal importance on the student's development of virtue as it does the student's mastery of knowledge and weaves character education into every aspect of its academic curriculum. We agree with Aristotle that one becomes good only by observing and practicing right behavior (BCSI Model Application page 10). HCA will first outline positive behavior through several means: 1) HCA's Core Virtues will be posted in the school hallways and in every classroom in English and Spanish; 2) these core virtues will be explicitly taught by teachers through books such as Aesop's fables and biographies of heroes and heroines in literature and history followed by Socratic discussions; and 3) HCA students will have an opportunity each day to discuss and apply these virtues in their afternoon Class Forum time in grades PK to 5 and Advisory period in grades 6-8. HCA will use a social emotional learning (SEL) curriculum, *Second Steps*, – available in English and Spanish - to provide support to special needs students in developing these virtues. Parents will also receive training in the core virtues, be encouraged to read with their children the inspiring stories of men and women of great character, such as Gandhi and Nelson Mandela, and learn with their children about these virtues through the HCA's Parent Forums. HCA students can then observe these virtues in action though the consistent behavior of the school faculty, staff, and their own parents. The school's discipline policies reinforce positive behavior and impose consequences for behavior that does not reflect the school's virtues, giving students an opportunity to practice HCA virtues daily. In addition, students will engage in community service, another means to practice virtues.

HCA, a data-driven school, will develop metrics and means to measure student growth in developing character, reflecting HCA virtues. Until the school develops its own metrics, HCA will administer the Panorama SEL assessment (https://www.panoramaed.com/social-emotional-learning-sel) at the beginning and end of each year to measure student growth on SEL components that match HCA core values, including responsibility, respect for others, courage/grit, and self- control.

Co-curricular programs. *Co-Curricular Programs (After School)*: HCA prefers to use the term co-curricular programs in describing its offering to its students, because these programs will be carefully designed to support the academic and character education of students. As stated above, HCA is planning to partner with the YMCA in its first year and co-design a sliding scale tuition-based after-school program that will be free to students on free and reduced lunch. This program will include homework support; supplemental work on *Istation*, *Dreambox* and *Duolingo* for reading, math and Spanish; physical activities; logic games; crafts and building tools; a digital SEL program the Y is piloting to supplement character education; and a partnership with Idea Lab Kids.

By 2023, while continuing its partnership with the Y for grades K-5, HCA will begin offering additional after school clubs based on student and staff interest, i.e. art, music lessons provided by external instructors, lego-logo robotics, debate, student government,

journalism, drama, etc. The school will also develop an online literacy magazine and newsletter that will be written and managed by students beginning in grade 5.

Athletics: HCA will begin competitive athletics for its middle school students, initially offering soccer, basketball, volleyball, cross-country and track in its fifth year of operation. As enrollment and interest grow, the school may offer football and baseball. HCA plans to join the Charter School Athletic League of Houston once middle school grades are offered.

Field Lessons: All students will extend their learning beyond the walls of the school through field lessons. HCA students will benefit from three to five field lessons per year to events and spaces such as museums, theater productions, NASA, the Juneteenth Mural in Galveston, court proceedings, and more. Middle school students will have extended field trips that may include a camping trip to explore nature, a trip to Austin to observe the legislature in action, and a trip to retrace the civil rights movement in the South.

Community Service: To quote Rabindranath Tagore: "I slept and dreamt that life was joy. I awoke and saw that life was service. I acted and behold, service was joy." HCA believes that the development of virtue, a cornerstone of classical education, cannot be truly developed without an understanding that service is joy. Therefore, beginning in Kindergarten, students will have opportunities to serve in multiple venues such as food banks, nursing homes, Habitat for Humanity building events, blighted area and beach clean-ups, and other events that will be initiated by our students' growing desire to serve.

Instructional Strategies

HCA will use a variety of instructional strategies, including many time-tested approaches with strong efficacy data, as well as techniques that enable differentiated instruction so that all students can be well-served (adapted from the BCSI model application document pages 4-5). These approaches include:

1) ***Explicit and systematic phonics instruction.*** The direct teaching of letter-sound relationships in a sequential manner has proven to be effective in laying the foundation of reading by giving students the ability to decode printed words. *(A response to recent re-analyses of the National Reading Panel report: Effects of systematic phonics instruction are practically significant,* Journal of Educational Psychology 2008, K.K. Stuebing, A.E. Barth, P.T. Cirino, D.J. Francis, and J.M. Fletcher).

2) ***Explicit and direct English grammar instruction.*** The use of diagramming and the study of root words, syntax, parts of speech, and the general structure of the English language equips students to read, write and speak with a high degree of competence.

3) ***Direct instruction.*** Direct instruction will be utilized in all subject areas. Direct instruction involves defining clear objectives, engaging students through inquiry, teaching the objective – often via lecture – and modeling, and includes guided and independent student practice time, checking for understanding, and closure. (7 Classic Steps of the Hunter Lesson Plan in *The Second Principle*, Owen Wilson). There is evidence that direct instruction is particularly helpful to low-income students (National Institute of Child Health and Human Development, 2000 and Ellis & Worthington, 1995).

4) ***Ability groupings.*** While mastery of the material as demonstrated on assessments will be required of each student, flexible ability groupings in the core subjects of reading and math, with adaptions for special needs and EL students, will enable teachers to provide differentiated instruction and individualized support to meet the needs of all HCA students. Ability groupings, which can be across grade levels, will be established using initial assessments and progress monitoring instruments to enable movement among the groups. (See *Ability Grouping and Student Achievement in Elementary Schools: A Best Evidence Synthesis*, Slavin, 1987.)

5) ***Socratic Method:*** This method, named for the Greek philosopher Socrates, promotes critical thinking and problem solving and is fundamental to classical education. BCSI will train HCA teachers to describe a situation or question, ask probing questions increasing in depth, and then pose summarizing questions to bring the dialogue to a conclusion. (See https://hillsdale.box.com/s/brhojjmtjxzf7cfssfqeibzod0jsnqiz.)

6) ***Problem-based and project-based learning***: The fundamental approach in Singapore Math is problem-based learning, where students utilize math to solve everyday problems. HCA will utilize project-based learning in two ways: to apply what has been learned and to learn new content through real-world projects.

7) ***Utilization of Primary Source Documents:*** Primary source documents such as letters, reports, photographs, books, and more, created by people who witnessed or participated in the events of the past, will be utilized to engage students, and bring history to life in ways that textbooks cannot. (BCSI Model Application page 5.)

8) ***Teaching of Study Skills:*** Classic study techniques such as outlining, note taking, and memorization, will be explicitly taught and integrated throughout the curriculum. Students will be expected to use these methods to master increasingly complex material in all subjects.

9) ***Multi-tiered System of Support (MTSS) Intervention Approach:*** HCA will use the MTSS Response to Intervention approach with 3 Tiers in reading and math to diagnose

and appropriately support students who are struggling in any way with mastery of the fundamentals in these subjects.

Continuous Evaluation of HCA's Curriculum and Instruction

HCA is fortunate to have a collaborative partner, BCSI, that will conduct an external evaluation of the curriculum and instruction every two years. HCA will establish in Year 0 a Curriculum Audit Committee, comprised of community members, parents, staff and at least one Board member, that will audit the curriculum annually to ensure that the curriculum is culturally relevant and anti-racist. Our Houston partner, APQC, a nationally recognized center located in Houston, will train the Leadership Team in process improvement as a method of internally evaluating HCA's curriculum and instruction. The training from APQC will be particularly helpful to establishing a culture at HCA of continuous improvement – plan, do, check (study) and act. (See https://www.isixsigma.com/dictionary/deming-cycle-pdca/.)

Curriculum and instruction will be evaluated annually on several dimensions: 1) student assessment data on TPRI and Acadience (reading); 2) Singapore Math (internal assessment); 3) annual STAAR testing (grades 3-8); 4) the NWEA MAP assessments (grades 3-8); 5) PSAT (grade 8); 6) parent surveys (grades 3-8); and 7) placement of our graduates into excellent high schools. The HCA Board will establish an Education Committee that will work with the staff to develop a matrix of these assessments and a quarterly review process. Data will be disaggregated by student demographics.

Strategies for Assessment of Learning and Data-Driven Instruction

(This section adapted from the Strategies for Assessment section on pages 43-45 in the HCA GEN 25 charter application.)

Required Assessments

HCA will open in August of 2022 with grades K-1, adding a grade each year until it is a complete school PK3-8, enrolling an estimated 1,056 students. At full scale, students will take the following STAAR assessments: Grades 3 –8, reading and mathematics; grades 5 and 8, science; writing at grades 4 and 7; grade 8, social studies. We are planning for all HCA scholars to take Algebra I in 8th grade, and these students will take the end-of-course (EOC) Algebra I test as well as the 8th grade mathematics test. HCA will also administer the following TEA-required assessments: K-2 –TPRI has been chosen for the reading development assessment and Acadience (formerly DIBELS) has been chosen as the progress monitoring tool from the list of acceptable options.

Additional Formative and Summative Assessments. HCA will administer the NWEA MAP assessment at the beginning and end of the year for all new students K-8, and then annually for returning students. This will serve as an interim assessment to determine readiness for the STAAR and Algebra I EOC tests. HCA will also utilize the Riggs and Singapore Math student inventories, teacher created assessments, writing assignment and research papers (grade 8) scored on a teacher-developed rubric, and student portfolios to gain a full picture of a student's progress toward mastery of the TEKS. Because character development is a central component of the school, HCA will develop an inventory to track progress on student development of the HCA seven virtues. In the interim, HCA will administer the Panorama SEL survey in the fall and spring to track development of many of these virtues, such as Courage (grit) and Moderation (self-management), that are aligned with the Panorama SEL Survey.

Formative and Summative Assessment Schedule

Assessment	Grade Level	Date of Administration
STAAR reading and math	3-8	April
STAAR writing	4,7	March
STAAR science	5,8	April
STAAR social studies	8	April
EOC Algebra I	8	May
TELPAS	EL students, K-8	Feb-April
NWEA MAP	K-8	September and May, new students; May returning students

TPRI/ACADIENCE	K-5	September BOY; January MOY; May EOY
ACADIENCE	K-2	Progress monitoring ongoing
SEL Panorama Survey	2-8	September; May
Riggs and Singapore Math inventories	K-8	Ongoing throughout the year

Alignment. Because BCSI has developed a crosswalk between the BCSI recommended classical education curriculum and the TEKS in all subjects for grades K through 8 HCA, has identified any TEKS that are not covered by the BCSI curriculum and is in the process of developing resources for these areas by securing the scope and sequences from successful classical charter schools in Texas, such as the Founders Classical Academy in Schertz. Between the BCSI curriculum and the additional curriculum materials, the HCA team is confident that the curriculum and student outcome goals are aligned with the STAAR test. HCA teachers will examine the content of the NWEA MAP tests to determine this assessments' alignment with the curriculum and make minor adjustments to the curriculum as needed to support students doing well on the MAP test. The Riggs and Singapore inventories are 100% aligned with the curriculum and student outcome goals. The SEL Panorama survey is not congruent with the character education curriculum and HCA working with BCSI will develop its own inventory.

Data to Inform Instruction. Data-driven decision-making is a key component to all aspects of HCA – academic, co-curricular, financial, governance, safety, and security. It is complemented by subjective judgments of teachers, counselors and social workers, parent input and observations, and student self-assessment. The school will invest in software such as Power School and Innovare that can accumulate the data from all of the formative and summative assessments and disaggregate it by race, FRL, SPED, EL, G/T, and gender to facilitate deeper analysis and to develop an individual learner profile. This data will also ensure that all sub-populations are being served well by the HCA academic model as a measure of equity. Academic assessment data will be analyzed in the following ways to determine appropriate interventions and to ensure that every student is achieving at high levels and reaching his or her potential:

1) Number and percent of students at developmental levels on the TPRI reading inventory grades K-2 and Acadience reading inventories;
2) Number and percent of students achieving proficiency and showing growth by subject as measured by the NWEA MAP tests and by the TELPAS for EL students;
3) Number and percent of students scoring at proficient or mastery levels on the Riggs and Singapore Math inventories.

In addition, HCA will conduct further analysis to determine what program changes may need to be made: 1) Data for new students and returning students will be analyzed to detect any differences to determine if adjustments are required to the school orientation process; 2) comparison of HCA data to other BCSI schools, peer Texas charter schools,

particularly classical education schools; and 3) comparison of subgroup data to state historical and current data for these subgroups to ensure that achievement gaps between subgroups are minimized. A key goal of the school's learning measurement process will be to provide results of findings and outcomes by way of communication and feedback to students, parents, and other stakeholders. Students, parents, staff, and Board members will receive published reports of student achievement on an individual and collective basis with the intention of encouraging community ownership of learning outcomes and increased accountability for the teaching and learning practices the school espouses. These practices will be re-evaluated on an annual basis to allow for adjustment of techniques, strategies, other relevant programs with the intention of more significantly affecting learning outcomes. (From BCSI model charter application, pp. 5).

Strategies to Support Students Performing Below Grade Level. HCA will examine the data for all formative and summative assessments listed in the Table on page 46-47 to identify students who are performing below grade level in any subject, seek to determine the cause for the delayed progress, and employ techniques indicated by research to be effective in increasing performance: "An index of five policies suggested by over forty years of qualitative research – frequent teacher feedback, the use of data to guide instruction, high-dosage tutoring, increased instructional time, and high expectations – explains approximately 45 percent of variation in school effectiveness." (*Learning from the Successes and Failures of Charter Schools,* Fryer, Brookings, 2012). First and foremost, each student needs to get the message that he or she can perform at high levels and that HCA staff believe that they can do it. Then the school will give these students additional time before and after school and in summer programs and specific feedback, high-dosage tutoring, and diagnostic and progress monitoring assessments for Tier groupings.

If a student's deficiency is in reading, students will first be given additional diagnostic assessments to see if they are dyslexic and may require tutoring from a Neuhaus Center tutor or teachers trained by Neuhaus Center. They will also be placed in a Tier 2 or 3 intervention group and provided additional support using the Riggs program, Istation (in English and Spanish), and individual and group tutoring for EL students. If they are behind in math, students will be place in a Tier 2 or 3 intervention group in the Singapore Math program, be given additional work on Dreambox at home and after school, and provided individualized tutoring, if needed.

HCA will also identify the bottom 10% of its students for proficiency as well as growth on the STAAR and MAP assessments to carefully monitor progress and provide substantial support to these students.

Supports for Special Populations

(This section adapted from the Supports for Special Populations section pages 46-49 in the HCA GEN 25 charter application.)

Projected Populations and At-Risk Groups

	%	Year 1	Year 2	Year 3	Year 4	Year 5	At Capacity
Total Enrollment		192	288	472	656	756	1056
Students with Disabilities	10.2%	20	29	48	67	77	108
English Learners	36.3%	70	105	171	238	274	383
Gifted and Talented	9.9%	19	29	47	65	75	105
At-Risk	64.8%	124	187	306	425	491	684

HCA is firmly committed to serving special population students and hence upholding with fidelity Title VI of the Civil Rights Act and Title IX of the Education Amendments of 1972 that prohibit discrimination on the basis of race, color, sex or national origin. Taking an average of the school year 2019-20 populations of the three contiguous school districts where the school plans to locate, HCA calculated the projected number of students in each special population category listed above (www.txschools.gov). However, given the desire to serve all students equitably, we have raised the percentage of students that are identified as students with disabilities from the average from the districts of 8.6% to 10.2% to ensure that we are correctly identifying students. HCA's curriculum was chosen because its historical data showed that when implemented with fidelity, students from diverse backgrounds and learning abilities respond successfully. At the time of enrollment, HCA will use information from parents included in the questionnaires and surveys that may include the *Home Language Survey* and/or a *Special Needs Questionnaire*. It will also review available previous academic records from transferring public schools (including if applicable previous Admission Review, and Dismissal Committee (ARDC), Language Proficiency Assessment Committee (LPAC), or Section 504 Service plan) & private schools, and Early Childhood Intervention (ECI) records to determine actual special populations and at-risk group student needs. If an enrolled student's previous academic records indicate that he or she is identified as a student with a disability, EL, G/T, or at-risk, HCA realizes that it must hold the necessary committee meetings (ARD, LPAC, or Section 504) in accordance with state and federal laws within the required timeframes to ensure that

there is a plan to support that student's identified diverse learning need. Additionally, ARDC will convene at least annually to ensure student's Individual Education Programs (IEPs) are adequate in helping students meet their annual goals.

In Year 1, the school will employ one full-time SBEC certified Special Education Coordinator and one part-time special education teacher to meet the needs as defined by the ARDC and to support the classroom teachers in ensuring that our students eligible for SPED are provided with a free and appropriate public education (FAPE) in the least restrictive environment (LRE) as required by the Individual with Disabilities Education Act (IDEA) (see financial workbook, personnel tab lines 15 and 16). Year 1 we anticipate that half of our SPED needs will be speech, as that is consistent with eligibility trends in early years. Oversight of the Special Populations program will be a combination of school administration and contractual agreements. A third-party vendor will be contracted to provide eligibility evaluations for dyslexia, SPED, and Section 504, as well as provide any instructional and/or related services, such as speech language therapy. The EL program will be monitored in year one by a designated administrator who will also serve as the MTSS Coordinator. The EL program will uphold the Equal Education Opportunities Act of 1974 to ensure that all English learners participate in meaningful education programs. As the special populations needs grow, HCA will plan to provide additional in-house positions to oversee and support the needs of eligible students and programs.

Students with Disabilities

HCA is enthusiastic about serving ALL students and therefore identification and support for students with disabilities is central to its mission. Given that ALL students are capable of achieving results, systems and structures will be in place to ensure equitable outcomes. HCA will identify, evaluate, and appropriately place students with disabilities in accordance with applicable state and federal laws. HCA understands that Child Find specifically requires the location, identification, and evaluation of an enrolled student who may also be a student with a disability. MTSS focuses on the whole child which includes academics, behavior, and social/emotional supports. By implementing a MTSS framework, HCA will provide targeted support to struggling students. The MTSS framework allows intervention for struggling students and identification of students who may have a disability to be implemented sooner. The MTSS framework at HCA will include universal screeners (including those aligned with HB 1886 pertaining to screening of K-2 students at risk of dyslexia) and a review of cumulative data such as performance on NWEA MAP found in previous academic records. The HCA MTSS framework provides increasing levels of support at Tiers 1-3, high yield instructional strategies, and frequent monitoring of student progress. HCA has a robust Tier 1 that includes solid phonics instruction, English grammar instruction, ability groupings, teaching of study skills, utilization of primary source documents, and the Socratic method.

The Core Knowledge Sequence, Riggs, and Singapore Math curriculum programs build

on what students already know. This is especially beneficial to students with varying learning abilities. These programs emphasize foundational skills using rich content, allowing teachers to respond to the needs of every student, including those below grade level. This evidence based, high-quality instruction with ongoing assessment will be the strong Tier 1 instruction provided to all students. Students who are demonstrating some academic difficulties will be provided additional support within the classroom, through small group and/or differentiated instruction. The Tier 2 based instruction is focused on targeted topics and still takes place within general education. Tier 2 supports MTSS framework will not delay or deny identification as required by Child Find. Students who do not respond to Tier 2 interventions or have other cumulative data to support that a disability is present will be referred for evaluation. HCA will provide the parent with the appropriate Prior Written Notice for both a Section 504 Evaluation or a Full and Individual Evaluation (FIE) for SPED as required by Texas State Regulation 19 TAC §89.1011. After receipt of the parent's consent to evaluate, HCA understands that it has 45 school days to complete the evaluation and 30 days from the date of the FIE to convene a meeting to determine eligibility and, if eligible, develop a plan (504 Service Plan or Individual Education Plan). Both the ARDC and Section 504 Committee will consider information from all relevant stakeholders in the development of the respective plans. For students that need Special Education Services, an ARDC will be formed and will include a parent, at least one general education teacher of the child, one special education teacher of the child, a school administrator with instructional expertise to interpret the implication of the results and, whenever appropriate, the child. Other individuals may be invited to join the ARDC if they have specific expertise. If a student also is identified as an English learner, a member from the Language Proficiency Assessment Committee (LPAC) will be invited and, as applicable, teachers with certifications in audio or visual impairments if the student has the associated documentation.

At the higher level of Tier 3 instruction, supports will be provided that are higher intensity and require regular progress monitoring. Even with high-quality intensive instruction, this will still be push-in and removal from the general education environment will only occur if the severity of the disability prevents services from being achieved satisfactorily. Moreover, given the overrepresentation that occurs that disproportionately affects African American students, HCA will avoid misidentification through the uses of comprehensive evaluation procedures. On the other hand, HCA also commits to working against the under-identification of students that need additional special education supports. Parents or school personnel may refer a child suspected of having a disability for an evaluation at any time. There is nothing in the Texas Education Code 89.1011 prohibiting school personnel or the parent from referring a child of a suspected disability for an initial evaluation prior to completion of HCA's MTSS Tiers. The MTSS Framework cannot be used to deny or delay the full and individual evaluation of a child suspected of having a disability under 34 CFR §300.8.

Continuum of Services. IDEA requires that students with disabilities be educated with their non-disabled peers in the general education classroom to the maximum extent appropriate as determined by the ARDC. The ARDC at HCA will always start with general education first when making recommendations for academic supports. Placement decisions shall be made by the ARDC and shall be based on individual needs and the Individual Education Program (IEP) of the student 19 T.A.C. §§ 89.1075(e) and 89.63(c)(6). In the case of students who are identified eligible for SPED, the HCA ARDC will consider inclusion of such students in the least restrictive environment first before considering a specially designed instruction in more restrictive settings. In instances where a student's IEP includes support, placement, or related services that HCA doesn't offer, HCA understands that the school must address the students' needs at no cost to the parent through inter-local agreements, contractual relationships with qualified vendors, and partnerships within the community. Although HCA has a commitment to inclusion first, it will make available a continuum of services to meet the individualized needs of students with disabilities. The full-time special education teacher will regularly consult with the General Education teachers to ensure that there are appropriate accommodations so that students can spend the maximum amount of time in the least restrictive environment of the general education classroom. The continuum of services will include: Mainstream (Inclusion), Resource (Pull-Out), Special Education Self- Contained (or Life Skills) with access to a general education teacher, Full-time Special Education Classrooms, and other restrictive settings such as special day and residential schools, which are part of this continuum of services. Students in the mainstream setting can be supported through the provision of accommodations, teacher assistance, special educator assistance, external resources, and technology resources. When a student qualifies for special education with a speech language impairment (SI) disability, HCA is prepared to contract with a provider with the appropriate Speech Language Pathologist credentialing as outlined by Texas Department of Licensing and Regulation (TDLR) and American Speech Hearing Association (ASHA).

HCA understands that a team approach is important to ensuring that all students can attain goals set forth in its mission. Frequent and purposeful collaboration between the general education and SPED teachers is central to this team approach. In the first year, HCA will have one Special Education Coordinator as well as a half-time special education teacher. The Coordinator will manage meetings, records, and communication with parents and will also serve as a consultant to the school leaders, general education teachers, and other stakeholders to support the students with a disability achievement. IEP progress monitoring will occur in increments as defined by the ARDC. Progress monitoring will occur for all students with IEP's and will keep all parties accountable to the intervention deemed necessary by ARDC. Progress monitoring measurements will be brief and provided more frequently for students with greater needs. Examples that will be implemented include, oral reading fluency, single word reading list, math computation,

spelling, writing fluency, and behavior counts. When a student with a disability isn't making expected progress, any member of that students' HCA ARDC can request an ARDC to review and/or revise the student's IEP. For students with disabilities, the ARDC may determine the manner in which they are promoted or retained, including grade advancement based on STAAR performance. For students who are unsuccessful on STAAR tests or End of Course (EOC) exams, the IEP will include an intensive program of instruction to address the exam on which the student was unsuccessful.

For grades 5 and 8, the ARDC acts as the Grade Placement Committee. HCA will hold an ARDC prior to the second administration or the required assessments to determine if the student will be required to take a second administration, develop an intensive program of instruction, and determine if the student will be promoted to the next grade. The ARDC will address transition (IDEA 2004 §300.320) not later than the first IEP in effect when the student turns 16 years of age. This and subsequent IEPs should include post-secondary goals that are based upon a transition assessment. The ARDC determines if they are required to meet satisfactory performance on required state assessments in order to meet graduation requirements. If the ARDC determined that a student in SPED requires modification to the required curriculum in a required course for state credit on the Foundation High School program, the student will also be required to successfully complete his or her IEP and meet additional criteria such as demonstrating employability skills. HCA understands that for a student in SPED to maintain an endorsement, HCA must ensure that the modified curriculum is sufficiently rigorous. HCA will ensure that the SPED teachers, paraprofessionals, and related service personnel are certified, endorsed, or licensed in the area or areas of assignment.

Meeting the Needs of EL/LEP (Limited English Proficiency) Students. HCA is committed to meeting the needs of non-English speaking students who are newly or current ELs by adhering to the expectations of Texas Education Code (TEC) Chapter 29, Subchapter B. In more detail, HCA will be identifying EL students and continue to serve EL student by providing bilingual education and ESL programs, seeking appropriately certified teaching personnel, providing extensive research-based professional development to teachers and staff, and assessing the academic and language development of EL students throughout the year. HCA is anticipating that its EL enrollment will mirror that of schools in the geographic region at 36%. HCA will ensure that there is at least one ESL certified teacher per grade level and one Bilingual certified teacher per grade level beginning year one. When recruiting and hiring teaching staff, preference will be given to teachers with ESL and Bilingual Certification endorsements as well as those who have ample EL professional development.

In accordance with TAC §89.1201, every student who has a primary language other than English, and who is identified as an English learner, will be provided a full opportunity to participate in a bilingual or English as a second language (ESL) program, as required in

the Texas Education Code, Chapter 29, Subchapter B. To ensure equal education, HCA will:
(1) identify English learners based on criteria established by the state;
(2) provide bilingual education and ESL programs, as integral parts of the general program as described in the TEC, §4.002;
(3) seek appropriately certified teaching personnel to ensure that English learners are afforded a full opportunity to master the essential knowledge and skills required by the state; and
(4) assess achievement for essential knowledge and skills and language development in accordance with the TEC, Chapter 29, to ensure accountability for ELs and HCA.

In accordance with *19 TAC §89.1220 (e)*, HCA will have four calendar weeks upon initial enrollment, to complete the testing and convene as an LPAC to determine the English learner status of each student. The identification process and requirements as outlined in the Commissioner's Rules, Chapter 89, pertaining to the Language Proficiency Assessment Committee (LPAC) Framework include the following elements: 1) Home language survey administered in English and the primary language whenever possible; 2) State approved English proficiency test for identification (PreK-1 listening and comprehension and 2nd-8 listening, speaking, reading and writing components); 3) LPAC meeting; and 4) Parent notification of identification and approval of placement. All Spanish speaking qualifying students will be offered a bilingual education program. In this instance, HCA has identified a Transitional Early Exit Model as one that would best serve the population. All other qualifying students who speak a language other than Spanish will be offered an ESL program (ESL Content-Based Instruction.)

Transitional Early-Exit Bilingual Education Model Selected. Because of the content-rich nature of the HCA curriculum, HCA has selected the Transitional Early Exit Bilingual Education model from the four state approved models for bilingual education in elementary. A Spanish-English bilingual education program will be provided by teachers certified in bilingual education and who are trained in effective second language education methods. The goal of the early-exit bilingual education is for Els to build on their primary language and literacy skills to attain full proficiency in English in order to participate equitably in school. EL students receive instruction in literacy and academic content in their primary language as well as English from teachers certified in bilingual education and grade-level content. As the child acquires English, the amount of instruction provided in the primary language decreases until English proficiency is attained, in most cases by third grade. Students who receive services in other program, such as special education, 504, MTTS, and GT, may also participate in the bilingual program and therefore be dual-coded. The LAC, in conjunction with other student service committees, will meet to coordinate services based on the needs of each student.

Content-Based ESL Selected. HCA has selected the ESL Content-Based model from TEA options. ESL Content-Based is implemented for all ELs who qualify for languages services, when bilingual services cannot be offered because of limited resources, and where HAC would request a waiver (exception waiver request, per TEA guidelines). Some of the languages qualifying EL students speak as a first language other than Spanish are Arabic, Ebo, Vietnamese, Urdu, etc. The goal is full English proficiency, and the philosophy behind Content-Based ESL is that ELs can learn language through academic core content classes: ELAR, mathematics, science, and social studies. The intended goal is to develop both language proficiencies and content skills simultaneously through the methodical implementation of content TEKS through carefully designed lessons that scaffold learning in order to meet the linguistic and cultural needs of ELs. The name of the classrooms/class is referred to as Sheltered Instruction. For instance, a mathematics class would be labeled ESL Math or ESL Sheltered Math. Teachers serving ELs in content-based ESL will have appropriate content certification plus ESL Endorsement Certification and extensive sheltered instruction methodology training. HCA will provide coordination of this service with other programs such as special education, MTTS, GT and 504.

HCA's core curriculum programs were chosen because it permits instructional flexibility, adaptation and modification allowing all students, including ELs, to access the curriculum at maximum depth and rigor. Further, the EL program will also comply with TEC Ch.74, Subchapter. A., Title IV of the Civil Rights Act of 1964 and the Equal Opportunities Act of 1974. To identify EL/LEP students, the LPAC will coordinate the identification process, placement, assessment, and will monitor performance to ensure services provided are responsive to student's needs. The LPAC will consist of an administrator, a counselor, certified bilingual education teacher, certified English as a Second Language educator, and a parent of an EL/LEP participating in a bilingual or ESL program. Within the first four weeks of the first day of school, the LPAC will make recommendations concerning the most appropriate placement for the EL/LEP student; ensure all LPAC documentation is complete, and they will also report the number of EL/LEP students enrolled to the HCA Board and TEA prior to November 1st of each year.

The process for identification begins with every enrolling student completing a home language survey. The answers to the survey will help the LPAC appropriately identify which students need to participate in a TEA approved English Language Assessment (LAS LINKS is the only approved TEA assessment). Students who are identified as EL/LEP by meeting the LAS LINKS assessment criteria will be offered the required program, bilingual or ESL, within 20 days of their initial enrollment, and once parents' permissions are obtained then students will be placed in the appropriate program. All students who have been identified as EL/LEP will participate in the Texas English Language Proficiency Assessment System (TELPAS) test. The ratings obtained in Listening, Speaking, Reading and Writing will be used to provide the appropriate support for EL/LEP students as they access the robust curriculum and programs provided at HCA. However, language development and

academic achievement will be monitored throughout the year by the LPAC committed through grades, anecdotal teacher observations, and informal/formal classroom assessments in order to ensure EL needs are being addressed consistently and immediately.

Further, teachers and leaders at HCA will be trained on the use of the English Language Proficiency Standards (ELPS) and Proficiency Level Descriptors (PLDs) to ensure that they are fulfilling the requirements of the subject-area TEKS and the ELPS. EL/LEP students will be also be monitored and supported within HCA's MTSS framework. This additional layer of monitoring will ensure that the EL/LEP's progress and success is being monitored and responded to in real-time, this includes students that exit the EL program and become Monitors (this includes Monitor 1 through Monitor 4). The data obtained from the LPAC, STAAR, TELPAS, and the MTSS framework will be reviewed annually to evaluate the program effectiveness.

Program Reviews. Students who have been identified as EL will participate in the Texas English Language Proficiency Assessment System (TELPAS) test and all other state assessments such as STAAR (in the language of instruction and per LPAC recommendation). The ratings obtained in Listening, Speaking, Reading and Writing and STAAR performance (for upper grades) will be used to provide the appropriate support for EL/LEP students as they access the robust curriculum and programs provided at HCA. The focus on foundational skill development and literacy will be especially beneficial to EL/LEPs. Teachers and leaders at HCA will be trained on the use of the English Language Proficiency Standards (ELPS), Proficiency Level Descriptors (PLDs), sheltered instruction, and second language methodology to ensure that they are fulfilling the requirements of the subject-area TEKS and the ELPS. EL/LEP students will also be monitored and supported within HCA's MTSS framework and through the LPAC committee. This additional layer of monitoring will ensure that the EL/LEP's progress and success is being monitored and responded to in real-time; this includes students that exit the EL program and Monitors. The data obtained from the LPAC and the MTSS framework will be reviewed annually to evaluate the effectiveness of the program and student's progress.

Gifted/Talented Students

HCA's curriculum responds to the needs of diverse learners, including those with above grade level proficiency, who may also meet eligibility as G/T. The G/T program at HCA will identify and serve the needs of students who excel in general intellectual ability in language arts/social studies and/or math/science or excel in creative/productive thinking and leadership ability. Anyone can refer a student for consideration for the G/T program by contacting the designated school official. Once referred, program participation is determined by points obtained from multiple data sources: an achievement test, an abilities test, and other criteria. Scores will be entered and converted using an identification matrix. Upon identification, G/T students will receive daily services in multiple settings including small group instruction in the classroom, tutoring, or

personalized learning tools and platforms. HCA will hire at least one teacher with at least 30 clock hours of PD in Gifted Education or have a G/T Supplemental certificate who will support classroom teachers in providing appropriate instruction for G/T students. BCSI reports that it has had excellent success with G/T students in its classical education schools, as the general curriculum allows for flexible ability groupings.

Staffing

We are confident that our budgeted staff will be sufficient to meet the needs of our anticipated student population. We are starting with K-1 to make sure we can meet all the needs of our diverse learners. In our first year we will have two bilingual teachers, a full-time EL specialist, one full-time Special Education Coordinator and a half-time Special Education teacher. We will also have a full-time counselor beginning in year one (*see financial workbook, personnel tab)*. We believe this level of staffing will provide all our students with the learning environment to ensure their success. We also have a partnership with the Neuhaus Center, an expert in dyslexia, and are working on a partnership with a nonprofit with expertise in autism. While we already estimated a10% SPED education population, if our actuals are higher, we will adjust our staffing budget and ensure we employ the appropriate number of specialists to serve our students well. We are fortunate that we have a financial commitment from the Saunders Foundation to make any necessary staffing adjustment to meet out students' needs.

School Culture and Safety

(This section adapted from the School Culture and Safety section on pages 50-55 in the HCA GEN 25 charter application.)

HCA Culture

The culture of HCA will emanate from its core school virtues: moderation, courage, responsibility, prudence, citizenship, justice, and wisdom. For HCA, the north star represents our students possessing wisdom and virtue. HCA, from day one, will create a deep sense of community – both inside and outside the school walls. Several key systems will support the consistent implementation of the school culture:

Consistent Reminders and Practicing of the Core Virtues. The core virtues of the school will be posted in English and Spanish in the halls, in the classrooms, and will be part of the student/parent handbook. Clear expectations for student behavior will provide all students ample opportunity to practice the core virtues in their academic and co-curricular activities. To inspire students to develop strong and consistent core values, positive behavior will be rewarded through teacher acknowledgement and Virtue Cards, described below. All members of the school staff --- CEO/Superintendent, teachers, part-time specialists, lunch workers, custodians --- will also model the core virtues. The CEO/Superintendent will greet children with a handshake as they enter the school in the mornings, affirming positive behavior when he or she spots it; lunch workers will give good eye contact as they greet each student; teachers will treat children and parents with respect.

Forums. Harkening back to Roman Forums which were the center of life in the ancient city, HCA will sponsor several types of forums: 1) Parent Forums to discuss school matters and bring in accomplished speakers on various topics will occur three times a year in the evenings; 2) small "coffee forums" will happen once a month with the CEO/Superintendent; 3) student forums – all school or grade level assemblies – will occur weekly in the first two years, and may include student presentations, music, and dramatic readings. Students in grades K-5 will have afternoon classroom forums while middle school students will have a morning advisory period to share openly about any challenges and receive explicit short lessons in the core virtues.

Traditions. Shared traditions are the glue that hold a school family together. As a new school, HCA will develop these traditions alongside its diverse students, parents, and community – honoring many customs from different cultures. Traditions may include events such as a Constitution Day Celebration in September, Martin Luther King Day and President's Day celebrations in February, Black History Month celebration and study, an international festival, Greek and Roman day, Cinco de Mayo celebration, and a book festival. A highlight tradition could be Heritage Day, where each child comes to school

dressed as a character from history who is considered important to their heritage.

Communication, Communication, Communication. A secret to success in developing a positive school culture is constant communication about the vision, virtues, and positive progress of the school community as a whole. HCA will begin this communication two weeks before school starts with a home visit to each family to review the school mission and virtues and to provide opportunities for students and parents to contribute to the life of the school, even before the first day of school. Also, the school will communicate to families about positive events and student accomplishments through weekly paper reports that are sent home with the students and must be signed and returned, as well as through social media including its website, Facebook, and Instagram.

Approach to Student Behavior, including Student Discipline Practices. The central premise of a classical education is that students will be equipped to be self-governing, good citizens. Every aspect of HCA will purposefully put into place the structures to achieve this student outcome including school uniforms, traditional student desks, inspiring teachers that play a central role in education, and clear expectations, incentives and consequences. These structures promote a calm, productive learning environment.

Behavior Support Practices (adapted from Anna Julia Cooper Public Charter School Charter Application pp 48-53, given to HCA from BCSI). Behavior management problems take critical time away from teaching and learning; therefore, HCA will implement curriculum activities that teach social, emotional, and behavioral competencies. Self-discipline is seen as socially and morally responsible behavior that is motivated primarily by intrinsic factors, not solely by the anticipation of external rewards or fear of punishment. To ensure that a restorative response is promoted across the school campus, we will provide multiple opportunities for students to apply skills of social and moral problem-solving. A well-disciplined student will understand what is socially and personally healthy and productive, training the mind, and can correct his or her own behavior when straying from that ideal. HCA will enact the following strategies:

- **Reflection and Connection:** Students will be provided with a supervised space to reflect on their behavior so that they are able to have meaningful connections with teachers, administrators, school counselors, and peers to resolve any conflicts.
- **Character Building:** At HCA, students will be engaged in activities focused on character development through schoolwide assemblies, in-class advisory periods, volunteer opportunities in the community, and student dialogue resolutions. Moral character will be developed by demonstrated student actions that merit recognition for good behavior.
- **Student-Parent-Teacher Conferences:** Parents will always be informed about student behavior issues. Students will be guided and encouraged to self-correct any disruptive behavior; however, interventions that require a

parent conference will take place if student behavior does not improve.
- **Restorative Practices:** The expectation for meetings and problem-solving will be based on school-talk and restorative practices, nonviolent communication, and virtue-based conversation.

HCA Behavior Policies aim to prevent behavior problems by implementing targeted and intensive strategies to:

- Develop social problem-solving and decision-making skills among students;
- Establish and maintain close communication with each student's parents or caregivers, and to garner community support;
- Remediate and respond to chronic and serious behavior problems;
- Provide academic instruction and activities that motivate learning;
- Create a physical environment that is conducive to teaching and learning; and
- Establish predictable procedures and routines and implement additional effective schoolwide policies.

Behavior Expectations (Adapted from the Atlanta Classical Academy Handbook, a BCSI school). All policies regarding student conduct and discipline flow from this general principle: students must fully engage themselves in the education HCA offers them. Therefore, HCA expects students to:

- Attend school consistently, be punctual, and take responsibility for promptly making up any work following an absence.
- Be prepared for class and follow directions.
- Show respect for self, others, and property while following requests with a positive attitude.
- Communicate in a respectful tone of voice being mindful of choice of words.
- Follow lunchroom, playground, field lessons, lab, and individual classroom rules to ensure safety for all.
- Follow school rules when participating in school-related events.
- Adhere to the uniform policy unless there is an equity concern that the school will address.
- Not use threats or intimidation against any other person.
- Respect the health and safety of others, safety rules, and not bring tobacco, electronic cigarettes, alcohol, or any illegal substances to school or school-related events.
- Not leave the school premises without signing out in the main office
- Not bring anything to school that could be used to harm another or that is illegal.
- Abide by the HCA Honor Code once it is established in middle school.

HCA was founded to develop students in both mind and character. The school's virtues are the guiding principles used to cultivate and nurture character. Students are expected to conduct themselves honorably in word and deed, to strive to live by the HCA virtues,

and to encourage others to do so as well.

Affirming Positive Behavior. First and foremost, HCA seeks to affirm positive student behavior. Faculty and staff will be equipped with Virtue Cards, each card representing a different core virtue including a picture of a person whose life reflected that virtue, such as Nelson Mandela and Thomas Edison with Courage, thereby reinforcing the academic program through the discipline system. Virtue Cards will be given to students when faculty or staff members observe virtuous behavior or acknowledge exceptional academic effort. When students are acknowledged, it is important to directly associate the specific act of excellence with receipt of the Virtue Card. Classroom teachers will record Virtue Cards awarded in their gradebooks, and families will be notified each week in the weekly Friday packet of any accolades. Students will be recognized in school assemblies for their virtuous behavior. Many students will begin to seek out opportunities to exhibit virtue and academic pursuit for the Virtue Card itself. Over time, virtuous habits are formed, and the students cease the extrinsic motivation, understanding that doing the right thing for the right reason provides enough motivation on its own.

Multi-Tiered System of Supports (MTSS) for Improving Behavior. Consistent with our approach in our education plan and support for special populations, HCA will use a Multi-tiered system of consequences for its Discipline Policy (several ideas taken from Gen 24 Houston Classical Academy application page 47):

First Tier: a) Student receives a Needs Improvement Card with the specific area needing improvement; b) Teacher and student discuss the violation, teacher redirects student behavior in the classroom setting; c) Student completes a Plan for Improvement aligned with Restorative Justice Practices.

Second Tier: a) Student receives a Needs Improvement Card; b) student is removed from class and meets with the Lower School Head for discussion; c) Student completes a Plan for Improvement; d) student apologizes to the class in Class Forum or Advisory time using Restorative Justice practices; e) Family is notified.

Third Tier: a) Student receives a Needs Improvement Card; b) student meets with the CEO/Superintendent; c) student receives in-school suspension; d) Family meeting is required; e) Student completes a Plan for Improvement; f) Student apologizes to the school community using Restorative Justice practices.

Fourth Tier: a) Student receives a Needs Improvement Card; b) student meets with the CEO/Superintendent, and CEO/Superintendent conducts a thorough documented investigation to ensure the report is accurate and the appropriate length of suspension; c) student receives out of school suspension; d) Family meeting is required; e) Student completes a Plan for Improvement; f) Student apologizes to the school community

using Restorative Justice practices.

Fifth Tier: Student behavior, such as bringing a firearm to school and some bullying offenses under TEC Sec. 37.0072 such as bullying that encourages suicide or the release of intimate visual material, qualifies for immediate expulsion based on TEC Section 37.005 classroom and school removal.

The Needs Improvement Cards are recorded in each teacher's grade book and become part of the discipline referral records that will be reported to TEA. These records reported to TEA will be disaggregated by race and socioeconomic status so that HCA and TEA can verify that there are no discriminatory practices. Parents will have access to a cumulative record of both Virtue Cards and Needs Improvement Cards that have been given to their students. Consequences for infractions, as outlined in the MTTS system above, can include: a) loss of recess time; b) a meeting with the Lower School Principal or CEO/Superintendent; c) in-house suspension; d) suspension: and e) expulsion. For every infraction, students are expected to develop a Plan for Improvement and apologize as needed to the class, school community, and others. Parents are notified and involved for infractions Tier 2 and above. These policies are outlined in detail in the HCA Discipline Policy in **Attachment 8** on pages 235-244, and will be clearly defined and distributed in the student/parent handbook before each school year to ensure all families are knowledgeable of the school's discipline policies before day one of the academic calendar.

Serious infractions of the school behavior code may or must lead to suspension or expulsion:

Action	***School Response First Offense***	***Second Offense***	***Third Offense***
Use of illegal drugs on campus or at school events	Must be suspended	Must be suspended	Must be expelled
Use of alcohol on campus or at school events/trips	Must be suspended	Must be suspended	May be expelled
Bringing weapons to school	Must be expelled		
Bullying (TEC Sec 12.104)	May be suspended or must be expelled depending on the infraction	Must be suspended or expelled depending on the infraction	May or must be expelled depending on the infraction
Plagiarism (middle school)	May be suspended	Must be suspended	Must be expelled

The school will develop additional policies in accordance with all applicable state law and federal laws that apply to charter schools such as: TEC Sec. 24.104 related to the use of confinement and restraints; TEC Sec 37.008 related to reports to local law enforcement; and TEC 37.022, Notice of Disciplinary Action.

When a student is suspended or expelled as a result of a violation of the code of conduct, parents are entitled to due process and may appeal the decision using the following progressive steps: 1) an appeal to the CEO/Superintendent; and 2) an appeal to the full Board with the school lawyer present. The school will support students who have been expelled by providing them with all school records and transcripts and by providing letters of reference as needed. For a student who is suspended, the school will provide study packets so that the student can maintain his or her work and teachers will check in with the student and provide support as needed to ensure that the student is on track and not falling behind.

Students with Special Needs and EL Students (Adapted from the Atlanta Classical Academy Handbook, a BCSI school). Nothing in the HCA Code of Conduct or Discipline Policy will be permitted to infringe upon any rights provided pursuant to the Individuals with Disabilities Education Act, Section 504 of the Federal Rehabilitation Act of 1973, the Americans with Disabilities Act, or TEC 37.004 and 20 U.S.C Section 1415 (k)(4) and its subsequent amendments. Any student who is receiving special education services or has been identified as a student with a disability under the Individuals with Disabilities Act (IDEA) and whose acts are determined by the CEO/Superintendent or board of directors to have violated any rules, regulations or laws as alleged, shall be referred to an IEP committee. The IEP committee will be responsible for determining if the student's conduct is a manifestation of his/her disability and whether such conduct warrants a change in placement, amendments to the IEP, and/or disciplinary actions. If the IEP committee determines that the student's conduct is not a manifestation of the student's disability, it shall determine what, if any, disciplinary actions shall be taken with regard to offenses that the student has been found to have committed. The IEP committee shall also have the authority to consider, recommend, and implement any changes in a student's IEP or educational placement. Nothing in these rules shall alter or adversely affect the rights of students with disabilities under applicable federal and state laws.

HCA will also work closely with families of EL students to make sure expectations are clear and consequences are understood.

Informing students, teachers, and parents of the school's discipline policy. As stated above, during the two weeks prior to the start of school, each child will receive a home visit from the child's teacher and, in some cases, the CEO/Superintendent. During the home visit, a family will receive the HCA student/parent handbook that covers

expectations for academic performance and behavior, including HCA's discipline policy that clearly spells out offenses for which a student must or may be suspended or expelled, the rights of students with disabilities related to disciplinary action, and procedures for due process. (See **Attachment 8**, pp. 235-244.) Students will also review the discipline policy the first week of school through their homeroom teachers or advisors and at an orientation assembly run by the CEO/Superintendent for students in all grade levels. Teachers will become well-versed in the discipline policy during summer PD.

Uniform Policy. Students at HCA will wear professional yet comfortable school uniforms. In the first year, the school will provide uniforms for families who cannot afford to purchase them to ensure that uniforms are not a barrier to enrollment. In subsequent years, the school will have a school uniform and supply shop where families may choose uniforms that have been gently used and provide uniforms for families who cannot find suitable uniforms in the school store and cannot afford to purchase them.

Student, School and Faculty Safety. Security is of paramount importance to the families, staff and students of HCA. The school facility selected will pass all state inspections for fire, security, and health safety. All staff who are hired will undergo a thorough criminal background and reference check and will receive extensive training on safeguarding children, active assailant, and code red procedures. The school will have one point of entry and that entry point will be staffed at all times with a person who will: 1) check in all visitors; 2) provide visitors with name tags with their photograph on it; and 3) conduct a quick criminal background check using a Driver's License and Raptor software. The school playground area will be enclosed. The school will invest in state-of-the-art security cameras in critical spaces. Also, the school contract with an agency to employ a part-time security guard, the cost of which is included in the budget.

If the coronavirus still creates safety concerns in 2022, HCA will abide by all local, state and federal guidelines. In addition, HCA will explore the tools and strategies developed by the Parabola project to minimize health risks while maximizing learning (https://alwaysreadyforlearning.org/parabola-project).

Attachment(s):
8: Proposed Discipline Policies

Promotion and Graduation Requirements

(This section adapted from the Promotion and Graduation Requirements Section pages 56-58 in the HCA GEN 25 charter application.)

Policies. The HCA Board, with recommendations from the CEO/Superintendent and BCSI, will establish promotion, retention and graduation policies in accordance with state law and to support the success of all HCA scholars. The central focus of a classical education is MASTERY of the standards and objectives for each grade level; therefore, the school will offer students multiple attempts to reach that threshold. Per the state requirements, students will need to have an overall yearly average of 70, and 70 or above in ELA, Math, Science and Social Studies and meet minimum requirements established by the state on the STAAR test in order to be promoted to the next grade. For grades 5 and 8, as specified by the Student Success Initiative (https://tea.texas.gov/student.assessment/ssi/), "a student may advance to the next grade level only by passing the STAAR reading and math tests or by unanimous decision of his or her Grade Placement Committee that the student is likely to perform at grade level after additional instruction." In addition to these requirements: 1) a student will be promoted to the next grade level only if he or she has not missed more than 10 instructional days, with an exception to this rule if the Grade Placement Committee unanimously supports promotion to the next grade; and 2) any student who has not passed the Riggs reading assessment and is reading well below grade level even after an extensive summer program, will most likely be retained. It is critical to success in a classical education school that students read with fluency and comprehension.

Progression from Year to Year. HCA will develop a scope and sequence aligned with the TEKS for each core subject area. As part of this scope and sequence, HCA will outline what students will be expected to know and be able to do prior to moving on to the next grade. For example, students in grade 1 will be expected to have mastered the TEKS ELA/reading and math objectives for that grade level. Students who have not achieved this level of mastery will be expected to attend the HCA summer program that should be in place by the end of Year 1 as funding becomes available. By the time students graduate from eighth grade, they will be expected to: 1) be proficient in ELA and reading, as demonstrated by meets and masters thresholds on the STAAR test that beats district/state averages and proficiency levels on the MAP tests; 2) pass the EOC Algebra I test; 3) have excellent command of science, history and geography as evidenced by meets and masters levels on the STAAR and proficiency levels on the MAP tests; 4) have a command of Latin, as demonstrated by national Latin exams results; 5) be proficient in technology tools and understand what it means to be a good digital citizen; 6) have identified at least one career from the 16 career clusters outlined in the TEKS; and 7) been accepted into a good public or private school to continue their academic careers.

Students with Disabilities. "The admission, review and dismissal committee (ARDC) makes education decisions for a student with disabilities, including decisions related to state assessments and graduation requirements as described in TAC Sec. 89.1070." Therefore, the HCA ARDC will provide oversight for the process and ensure that the IEP for students with special needs will include provisions for promotion. The HCA ARDC will convene anytime students are in danger of failing or possibly being retained. The ARDC will make changes to the IEP to ensure students are successful, such as revising IEPs accommodations or adding additional accommodations or modifications. HCA's use of MTSS and frequent progress monitoring will support students with special needs in achieving the goals of their IEPs, making them eligible for promotion.

Communication. Promotion and graduation requirements will be communicated to parents in multiple ways to ensure that parents clearly understand these important requirements: 1) the requirements will be explained in detail during the home visits to each family prior to the start of the school year; 2) they will be spelled out in the student/parent handbook, available in English and Spanish, that will be in hard copy and an electronic version; 3) they will be reinforced at the quarterly student/parent conferences following report card production, with translation services available as needed; and 4) families of students at-risk of not being promoted will have one-on-one meetings as needed with the classroom teacher or advisor and the CEO/Superintendent to outline the challenges and the supports the school is putting in place to shore up the success of their child.

Systems, Structures and Supports for Students. The HCA Board and staff are deeply committed to the success of every HCA scholar and have developed the structure and systems to support students who may be at risk of not mastering the necessary standards and objectives:

Early Diagnosis of Reading Difficulties. One teacher at each grade level will be trained by the Neuhaus Center of Houston to diagnose dyslexia and other reading difficulties in our youngest scholars and devise a plan, in partnership with the parents, to remediate their reading skills. This plan may include the use of a Neuhaus tutor for which HCA has budgeted in Year 2. Since reading is so fundamental to a language-rich classical education, diagnosing and identifying reading difficulties is key to every student's success.

MTSS Model of Intervention and Progress Monitoring. The framework used to identify student learning deficiencies, develop hypotheses, formulate a plan, monitor progress, and analyze results will follow the MTSS model. The school will set up systems and methodologies to address student needs that may include data-based goals, reflection and review of instruction and methodology, differentiation of the instruction and other targeted interventions, as well as formative and summative assessments. The

MTSS model seeks to prevent academic failure through early intervention, frequent progress monitoring, and increasingly intensive research-based instructional interventions for children who continue to have difficulty. The MTSS model, adapted from the BCSI model, is as follows:

- **Tier 1** (core instruction and universal supports available to all students): Tier 1 consists of the general academic and behavioral instruction and support that is designed and differentiated for all students in all settings. School-wide progress monitoring and screenings are used to ensure that core instruction is effective and to identify students who may need additional support in order to be successful.
- **Tier 2** (supplemental instruction or intervention provided to targeted groups of students): Tier 2 consists of more focused, targeted instruction or intervention and supplemental supports in addition to and aligned with the core instruction provided through Tier 1. For instance, an additional 30 minutes per day may be devoted to reading in a small group (3-6 students), with a focus on building accurate and automatic recognition of words in text. Adjustments can be made within Tier 2 to increase time on task or decrease student/teacher ratio.
- **Tier 3** (intensive individualized intervention and supports provided to individual students): Tier 3 consists of the most intense instruction and intervention (increased time, narrowed focus, very small group or individual) based upon individual student need. Tier 3 supports are provided in addition to and aligned with the core (Tier 1) and supplemental (Tier 2) academic and behavioral instruction, interventions, and supports. (Explanation of 3-Tiers adapted from the BCSI model application)

Mastery Track. HCA will pilot Mastery Track (https://masterytrack.org), an innovative, free, digital tool that tracks mastery in any subject. Teachers can indicate that students have mastered the standards and objectives based on the TEKS in a dashboard that is accessible to students, teachers, and parents 24/7. Mastery Track is one of the few tools that supports the visible progress in mastering content in all subject – math, ELA, history, geography, and science. This is an additional support to ensure success on the STAAR test, because an indication of mastery is a stronger indicator of success than a grade on a quiz, test, or report card.

Extended School Day and Year. HCA scholars will extend the school day 30 minutes each day for K-5, one-hour for grades 6-8, and one week beyond the traditional surrounding school districts beginning in Year 2 to enable more time on task, one of the correlates of Effective Schools. Also, when funds become available by the end of Year 1, HCA will offer a one-month summer program with two tracks: one for struggling students to make progress in any areas causing difficulties; and 2) an enrichment program for students, including G/T students, who want to extend their learning. Students on FRL will be subsidized by the school; other students will pay a fee on a sliding scale. The projected summer program is not presently in the budget because funds have not yet been received

for this additional support for HCA students.

Classroom Forums and Advisory Period. Each school day for every HCA scholar K-5 ends with a 15-minute small group forum discussion about any issues or challenges of the day, as well as direct teaching of an HCA virtue. Middle school students will have an advisory period once a week and will have the opportunity to develop a strong relationship with one caring adult who is accountable for each student in his or her advisory group. Through these discussions, teachers can identify any personal or home challenges that may need to be referred to a counselor or social worker. These forums and advisory periods are also an opportunity for students to learn restorative justice practices, as they learn to talk frankly about any irresponsible or unkind behaviors they have engaged in and make restitution to their peers.

Counselors and Social Workers. Some learning challenges students face may be related to their home environment or emotional, behavioral conditions. The school will have access to a full-time counselor in Year 1 and will add another full-time counselor in Year 4. The school plans to add a part-time social worker in Year 1 and a full-time social worker in Year 3. (See Budget Narrative **Attachment 32** pp. 476-481)

Family and Community Engagement

(This section adapted from the Family and Community Engagement section pages 59-61 in the HCA GEN 25 charter application.)

Engaging Parents and Community Members. A genuine feeling of community with shared values, traditions, and respect for all members of the community is at the heart of a great school. It is the intent of the HCA Board to create a strong community from the time the charter application is approved throughout its many years of serving students and families.

HCA will create a bank of contacts for parents who have shown an interest in the school and community members that will include community leaders, pastors, area chambers, area nonprofits, SBOE members, and state representatives. The plan outlined for engaging parents and community members, from the application approval to school opening, includes the following:

1) Bi-weekly updates on the progress of the school toward its opening emailed or mailed to interested parents and community members;
2) Social media updates of newsworthy events to HCA's Facebook page and Instagram; blogs on the school website by school leaders and parents;
3) Three open houses to be held in October, early December 2021, and February 2022 to share information about the school and to introduce parents and community members to the new CEO/Superintendent and any other school staff who have been hired.
4) Small meetings in the homes of parents who have committed to the school that will include prospective families;
5) In April 2022, an all-school picnic at a park near the school for parents and community members;
6) By July, an email sent to parents and community members about the outstanding staff members who have been hired and their qualifications;
7) Early August 2022, a ribbon cutting ceremony held in the school facility so that families and community members can meet each other;
8) Home visits to each enrolled family during the month before school starts;
9) Coffee and donuts on the Tuesday prior to the school opening for parents and students to meet and greet the CEO/Superintendent;
10) Opening day morning welcome with coffee and pastries for parents to stop in and enjoy the excitement of the start of a new school.

Engaging Parents in School and Soliciting Feedback. HCA will create an inclusive, welcoming environment that engages all families in the life of the school, and most importantly, in their student's learning. HCA will post a sign in English and Spanish near the front of the school that will have a statement such as: "Parents are a child's most

important teacher. We welcome you as partners and encourage you to be involved in your child's learning and the life of the school." Parents will have several opportunities for leadership in the school: 1) At the end of the first year, the Board will expand and add one or two parents to the Board; 2) The school will establish a Parent Forum with a leader elected by the parents to help organize educational events several times a year that will always have a translator for Spanish speaking families and that will provide feedback to the CEO/Superintendent and Board on issues that may arise; 3) Parents will be invited to lead, organize, and even invent some of the school's new signature traditions such as a book fair, international festival, Black History Month activities, Cinco de Mayo celebration, Heritage Day, and an art show.

HCA is a firm believer in systems and structure and will establish the following strategies, many of them proven in other high performing schools, to encourage parents' support for learning and involvement:
1) Believing that relationships are the key to engagement, each HCA teacher will make a home visit to each of his/her students prior to the school year and maintain that relationship through proactive email and phone communication with the families throughout the year.
2) Teachers will encourage parents to volunteer in the classroom, to call the teacher on their cell phones if any issues arise, to and participate in field lessons and school events. HCA will sponsor book nights, Saturday maker -space events, field days, and other events to encourage parent involvement.

All signage in the school will be in English and Spanish, all documents will be produced in both languages, and the school will have at least one certified bilingual teacher in each grade K-3. HCA will also identify translators, as needed, in any other languages of students enrolling in the school and make sure they are readily available.

Communicating Student Progress and Staff Qualifications. When it comes to keeping parents updated about their child's progress, HCA will abide by three Cs: Communicate, Communicate, Communicate. To achieve this goal, HCA has developed the following strategies: 1) Teachers will send home folders each Friday that must be returned, signed, on Monday with student work and updates to review; 2) HCA is implementing a digital dashboard, Mastery Track, that will provide parents 24/7 viewing of their students' personalized progress toward mastery of the state standards and objectives; 3) HCA will have parent/teacher conferences every 12 weeks at convenient hours to accommodate all parents, with a translator present as needed; 4) Parents will be notified via phone and email if a student is struggling and be invited to a special conference with the teacher and any support staff to develop a plan to keep the student on track toward mastery. To comply with TEC 12.111 (a)(9) which requires a charter school to specify the manner in which the school will distribute information to parents related to the qualifications of each professional employee of the program, HCA will

produce and distribute via email, mail, and through the HCA website, a document in English and Spanish with a photo of each staff member, her or his position in the school, professional or educational degrees, all certifications, and relevant experience. The profile will also include a brief statement from the staff member of why he or she is enthusiastic about being at HCA. Toward the end of each year, HCA will send out a survey to all families including questions about the effectiveness of the school's communication strategies concerning their students' academic progress, how welcoming the school has been, and other questions about the school culture, safety, and student engagement and learning. The survey feedback will be summarized, presented to the Board, and used to continuously improve these initial strategies.

Community Resources: The HCA Board and staff when hired will actively engage in developing partnerships and good relationships with organizations in Northwest Houston such as the Greater Heights Chamber of Commerce, the Near Northwest Management District, the Acre Homes Chamber of Commerce, area churches, and local businesses such as Buckeye Partners LP. See **Attachment 4** pages 185-190 and **Attachment 9** pages 245-256 for Letters of Support from some of these organizations. As the school matures, HCA will work on developing a resource bank of mentors who can support students who may be struggling, as well as students who aspire to become doctors, engineers, ministers, business leaders, military leaders or other professions. Should HCA be granted a charter, HCA plans to enter into agreements for services with the following nonprofit and governmental organizations (see **Attachment 9**):

1) The YMCA will provide after school care, discount memberships for staff and families, and a digital app to track health and fitness;
2) Neuhaus Education Center will train one teacher in each grade K-1 in the summer before Year 1 to detect and remediate dyslexia and provide tutors;
3) HCA will contract with Region IV for support services as needed for SPED;
4) The Children's Learning Institute will provide teacher training in the use of diagnostic assessments such as TPRI and Acadience, as well as scientifically based reading instruction in comprehension and fluency;
5) Houston Baptist University will provide student teachers, potentially providing a feeder source for HCA for qualified teacher applicants, and will co-develop with HCA a teacher training program for classical education;
6) Families Empowered will continue to provide support in identifying families interested in a quality charter school from its waiting list.

Attachment(s):

9: Evidence of Community Support

Leadership and Governance

Board Structure and Qualifications

(This section adapted from the Board Structure and Qualifications Section pages 62-65 in the HCA GEN 25 charter application.)

Proposed board member	Area of expertise	Brief description of experience in this area
Stuart Saunders, President	Finance, Banking, Management, Operations, Fundraising, Real Estate	Chairman, Live Oak Bancshares Inc.; Managing Partner, Mission Heights Enterprises; has served on numerous boards; several as president
Kathryn Van der Pol, Secretary	Education, Operations, Management, HR	17 years of experience teaching Latin at St. John's School; owner and president of Liberty Hoepfl Garage
Richard Hendee, Treasurer	Finance and Operations	Owner, Horizon Associates; Has served on numerous boards, several as president
Chelsea Collins	Education and Leadership	Head of School at St. Luke's Episcopal School in San Antonio
Mano de Ayala	Law	Partner with Buck Keenan; has served on numerous boards
Debra Schindler	Marketing/PR, Operations, HR, technology, health	President and Founder, Genesis Business Communication Solutions

Board Structure and Responsibilities. One of the aims of a classical education is to teach young people to recognize good governance at the local, state, and national levels and to exercise self-governance. Drawing from best practices in independent schools and the BCSI guidelines for Board governance, the HCA Board will model excellent governance

to the school community. The leadership structure of the Board will consist of: 1) a President who will chair all meetings and ensure a well-functioning Board; 2) a Vice President who will chair meetings in the absence of the President; 3) a Board Secretary who will post meetings in accordance with the Open Meetings Act and records all meetings; and 4) a Treasurer who will oversee school finances. The Board meets monthly except for July in accordance with its by-laws (see **Attachment 10** on pages 257-270). The Board will establish the following committees:

- Governance Committee responsible for Board orientation and training, nominating new members for approval by the full Board, and ensuring the annual evaluation of the Board.
- Finance/Audit Committee responsible for developing in partnership with the CEO/Superintendent and Chief Financial Officer (CFO) the annual budget, three-year proformas, and overseeing the annual audit.
- Education Committee that works with the CEO/Superintendent to fine tune student performance metrics for the HCA curriculum aligned with the TEKS and develop a dashboard for easy Board oversight. The Education Committee will provide oversight to a Curriculum Audit Committee comprised of community members, staff, parents, and students that will annually review HCA curriculum and instruction to make sure it is culturally relevant and promotes social and racial equity.
- Executive Committee that can conduct required business in between full Board meetings.
- Development Committee that will provide oversight and support for fundraising to meet HCA's financial needs.

The Board may elect to appoint additional Ad Hoc Committees, such as Marketing/PR and HR Committees as needed, particularly in the early stages of the school.

Roles and Responsibilities. The HCA Board is very clear about its primary roles: 1) setting school policies that support the mission and vision of the school and lead to a safe, secure environment and support student learning; 2) monitoring academic and performance metrics for a culturally relevant curriculum aligned with the TEKS; 3) approving all capital improvements and expenditures over an amount designated by the Board to ensure all financial expenses are aligned to the mission of serving students well; 4) hiring an outstanding CEO/Superintendent to execute the school's vision and mission and holding him or her accountable for achieving performance metrics; 5) compliance with all local, state and federal regulations; 6) creating strategic plans that include 3- to 5-year financials; and 7) ensuring the financial health of the school through policies and controls and raising funds needed to support the budget. The CEO/Superintendent is responsible for hiring, developing, evaluating and firing, as needed, all school staff; enrolling students, developing the curriculum and instruction in accordance with Board policies and guidelines, and general operations. The HCA Board will not micromanage.

HCA recognizes the importance of the Board President and CEO/Superintendent having a good relationship, communicating frequently, and meeting every two weeks for updates. HCA has established a Code of Ethics and Conflict of Interest Policy shown in **Attachment 11** pages 271-286 to be read and completed annually by all Board members. No Board member shall be related to any other Board member or HCA school staff member within the third degree of consanguinity or third degree of affinity. All Board meetings will be open, videotaped, and electronic and hard copy minutes will be kept and made open in compliance with the Open Meetings Act.

Board Training and Evaluation. New board members will be onboarded to HCA through new member orientation that aligns all board members on the mission, vision, virtues, and key design elements of the school. BCSI requires that all new Board members attend a two-day training at Hillsdale College prior to the opening of the new school. This in-depth training covers the following topics: *Board Governance Fundamentals: Principles and Structures; Governance vs Management – What's the Difference?; Board Oversight and School Finance Management: The Charter School's Achilles Heel; The Effective Board Meeting and Minutes; School Performance and Compliance; School Performance – What is a Good School?; It starts with a Good School Leader; School Leader Evaluation; and School Leader Board Reports*. Moreover, based on the Texas Education Agency requirements, the HCA board will attend all state-mandated training for trustees that includes the required 12 hours of training.

HCA plans to adapt a Board self-assessment tool developed by Board Source for the National Council of Nonprofits (https://boardsource.org/resources/successful-board-self-assessment) that the HCA Board Governance Committee will administer each year. The HCA Board plans to use this modified self-evaluation tool as well as another aligned survey tool in a 360-degree approach to gather feedback on its performance from school staff, parents, and community partners. Metrics in the Board evaluation cover its effectiveness in strategic planning, ensuring adequate financial resources, evaluating the CEO, communication, visibility at school events, and compliance with open meetings. In addition to the BCSI training, the HCA Board will attend all other Board training required by TEA of charter schools and trainings offered by the Texas Charter School Association, which HCA plans to join.

Process for Addressing Concerns. The central premise of the process to address concerns is: two-fold: the process should be fair and accessible to all and we want to support parents to take their concerns to the person who is in the best position to do something about it. To abide by this principle, the school will implement the following three-step process to address parents' or students' objections which may arise: 1) The parent and student will be advised to first talk directly to the staff member who was involved, with a Principal present; 2) If not satisfied, the parent and student will then meet with the CEO/Superintendent to engage more deeply into the complaint and gather the

appropriate evidence; 3) If still not satisfied with the superintendent's decision, a formal complaint will be filed with the Board. In the event the Board is engaged, the Board Chair will appoint a three-member grievance review committee to conduct any additional investigative action. If the complaint involves other students, the Board will engage with all members including students and their parents to find all evidence. Given the Board is ultimately responsible for governance, the complaint process ends here. However, the complainant can file a formal complaint with the TEA if he or she feels the Board has violated its charter and the HCA Board will assist the complainant with any information needed. The grievance policy will be accessible in the student handbook and on the HCA website. This procedure is designed to solve complaints internally, as quickly as possible, with a timeline of no more than 60 days. We do expect most claims to be resolved within a shorter timeframe.

Characteristics and Size of Governing Board. The current HCA Board members have the following experience and expertise; law, business management, banking, education, fundraising, foundation experience, community service, marketing/PR, and finance. We are fortunate to have two educators on the Board. Chelsea Collins is currently Head of School at St. Luke's Episcopal School in San Antonio; she was previously the Middle School Principal at The Kinkaid School for seven years and was a teacher and leader in several public schools prior to Kinkaid. Kathryn van der Pol taught Latin at St. Johns' School for 17 years. HCA plans to add more Board members in the coming years with similar skills and expertise with the addition of real estate development and/or facilities management, fundraising, communication, and human resource management. It will add parents and more community members once the school has a school site and will continue to seek diversity on its Board. The optimum size when the school is at capacity is 15 members and there is no maximum stated in the Board by-laws.

HCA has also developed an **Advisory Board** of community leaders and educators who can advise HCA on parent and community engagement and curriculum. (See page 353.)

Governance, Management and Staffing Structure. The Year 1, 3 and Full Capacity Organizational Charts (**Attachment 13,** pp. 354-357) show the Board and its Committees as a true governing Board with a line only to the CEO/Superintendent, who reports directly to the Board. At full capacity, the CEO/Superintendent will have members of his or her Leadership Team as direct reports: Chief Academic Officer (CAO), Chief Financial Officer (CFO), Chief Operations Officer (COO), Director of Enrollment/Community Outreach and Principals. The Special Education Coordinator and EL Specialist report to the CAO. Teachers, counselors, social workers and assistant principals report to the appropriate Principal. The PEIMS Manager and HR Coordinator report to the CFO. Food service, transportation, security, facilities, technology, and custodial services report to the COO.

Support and Evaluation of the CEO/Superintendent. The HCA Board will provide resources, effective policies, open communication channels, and moral support to create the conditions for success for the selected CEO/Superintendent. The CEO/Superintendent will have access to training through BCSI as well as APQC on continuous improvement and effective meetings and will receive a travel stipend to visit several nationally recognized classical education schools with outstanding results with diverse populations. The CEO/Superintendent will receive a 360-degree evaluation with input from the Board, staff, parents, community members, funders, and other stakeholders. The evaluation form in **Attachment 14** pages 358-363 was adapted from the BCSI template by the HCA Board and will be modified with input from the new CEO/Superintendent after he or she is hired. It incorporates the following performance indicators:

- **Professionalism:** Serves as a positive role model for the school community; conducts himself or herself in a professional manner; uses sound judgment.
- **Mission/Vision**: Communicates effectively and successfully implements the mission, vision, and virtues of the school.
- **Instructional Leadership**: Ensures the fidelity of implementation of the HCA curriculum and instruction that is culturally relevant and aligned with the TEKS; and will be evaluated on the focus he/she has on this important role and his/her effectiveness as an instructional leader.
- **Functional Leadership**: Seen as a strong leader inside and outside the school community; recruits, selects, hires, supports and evaluates an outstanding staff.
- **Financial Management**: Works with the Finance/Audit Committee and Board to develop 3- to 5- year proformas and annual budgets; ensures that the school meets its annual budget; works with the Board Development Committee to raise necessary funds to meet the annual budget.
- **Operations Management**: Ensures the smooth functioning of the organizational infrastructure, the cleanliness of the facilities, and the safety and security of all constituents.
- **Communication and Community Relations:** Provides effective communication with the Board, faculty, staff, parents and all other stakeholders and has a capacity to develop partnerships with community leaders and organizations.
- **Evidence of Meeting Goals**: Student outcomes for all student groups are on target; other performance indicators are on target.

Attachment(s)

10: Board's Bylaws; 11: Code of Ethics and Conflict of Interest Policy;
12: Board Members' Resumes and Biographies; 13: Organizational Charts for Year 1, Year 3, and Full Capacity; 14: Tool(s)/Process to Evaluate Superintendent

Proposed Superintendent Qualifications

(This section adapted from the Proposed Superintendent Qualifications section on pages 66-67 in the HCA GEN 25 charter application.)

CEO/Superintendent Qualifications and Recruiting Process. The most important decision the HCA Board will make is the selection of the founding CEO/Superintendent. This individual must possess at a minimum a Master's Degree (Ph.D. or Ed.D. preferred); have experience and knowledge about a classical education approach; possess demonstrated leadership abilities; exhibit exceptional moral values and character; and be the type of person that people instinctively trust in order for them to enroll their children in a school that does not yet exist. Additional qualifications include:

- At least five years of progressively responsible positions in school leadership as a principal, division head, or superintendent;
- Teaching experience at the K-12 or college level;
- Strong interpersonal and communication skills, including clear writing and compelling presentation skills;
- Strong financial and business background; ability to read, understand and manage financial statements and budgets;
- Ability to build a capable team within the school and with other partners and constituents of diverse backgrounds in the public, private and nonprofit sectors;
- Ability to manage multiple priorities and tasks simultaneously.

As stated in the detailed job description in **Attachment 16** on pages 365-368, the CEO/Superintendent will be expected to provide leadership to the school, sharing the vision and mission and creating a positive school culture; hire, support, and evaluate all teachers and oversee the instructional program; hire, support, and evaluate business and operations staff and oversee the finances, business operations and all administrative functions; and cultivate and develop external partnerships with nonprofits, businesses, community organizations and funders.

Because this is such an important decision, the HCA Board did not want to rush into a selection of CEO/Superintendent prematurely. Instead, they have elected to hire an Executive Search Firm, ESI Works to conduct a thorough national search for the new CEO/Superintendent. We understand that once the CEO/Superintendent is selected, he or she must reside in Texas the year prior to the start of school. The search process includes discussions with the Board to develop a position statement and job description (note – the job description in **Attachment 16** will be modified during this process); candidate search through networking and postings; initial screening through preliminary interviews; submission of candidate CVs, statement of interest, education philosophy, and references; comprehensive in-person interviews in Houston; final selection and then

additional reference checks, criminal background checks, and transcript verifications. The timeline is detailed and would begin in January 2021, leading up to in-person interviews in March (if possible) and a final selection in April, 2021, with the new CEO/Superintendent in position in time for the May and June interviews with TEA and the SBOE respectively. Staff from BCSI will provide input on the candidates, but the HCA Board is responsible for the final decision.

Proposed Starting Salary. The proposed starting salary will be $130,000 with a benefits package of an estimated 18.83% of salary that includes medical and dental, Medicare and other taxes, and retirement. This salary was determined by examining the starting salaries of superintendents of schools beginning with only lower grades and superintendents leading classical education schools in Texas. The salary represents $677 per student in Year 1.

The HCA Board will review the CEO/Superintendent's salary after the first year of operation, again conducting comparisons with surrounding charter schools and districts. Salary adjustments will be considered using the following metrics: student academic achievement data/performance; student, parent, and staff surveys/feedback; internal Board evaluation; external audits; teacher and staff hiring and performance; and the overall fiscal health of the school. HCA expects the CEO/Superintendent to share a deep commitment to the HCA mission, vision, and surrounding community. If the CEO/Superintendent becomes unable to fulfill his/her duties due to unforeseen circumstances, the Board members will devote their comprehensive knowledge and expansive resources to finding the appropriate replacement. The first place the Board will look is to independent school search firms that regularly place Interim Heads. The Board, BCSI team members, and instructional school leaders, along with any other resources deemed necessary at the time of transition, including the original search firm, will be utilized to ensure a smooth transition for HCA and its new CEO/Superintendent.

Succession Planning. The school will hire a Lower School Principal in Year 1. When the school has sixth graders, HCA will hire a Middle School Principal. Because BCSI has required training annually for teachers and school leaders, we anticipate that the people filling these two positions will have a chance to grow and learn about leadership in a classical education environment and potentially succeed the first CEO/Superintendent. At each grade level, HCA will have Master Teachers who, with support and training, may be qualified, as well as the assistant principals, to assume one of the Principal positions.

Attachment(s):

16: Job Description or Qualifications for Proposed Superintendent

Proposed Instructional Leadership Team

(This section adapted from the Proposed Instructional Leadership Team on pages 68-69 in the HCA GEN 25 charter application.)

Instructional Leadership Team Roles, Responsibilities, and Qualifications

HCA has not yet identified any instructional team members, but job descriptions for all positions below are included in **Attachment 18** on pages 370-377. Once the CEO/Superintendent is hired, the CEO/Superintendent, with input from Board members as requested by the CEO/Superintendent, will be responsible for hiring and supervising the Instructional Leadership Team. In Year One, this team will include:

- Lower School Principal;
- Director of Enrollment and Community Outreach (half-time);
- Special Education Coordinator (full-time);
- EL Specialist (full-time);
- Two bilingual teachers;
- Master Teachers K and 1;
- Counselor (full-time);
- Social Worker (half-time).
- Nurse (half-time)

Given the projected numbers of students on free and reduced lunch and who are at-risk, HCA in the first year will hire a full-time counselor and a half-time social worker who will be part of the Instructional Leadership Team to provide insight regarding students' emotional and personal needs. The CFO is not an official member of the Instructional Leadership Team but will attend meetings related to budgeting and planning, as HCA intends to integrate the financial and instructional teams to ensure that budgets are developed around instructional priorities. Also, the IT Director will attend Instructional Leadership Team meetings to help set instructional technology priorities and recommend products to purchase aligned with instructional goals.

By Year 3, HCA will hire an Assistant Principal to support the Lower School principal as well as a half-time COO who will be involved in instructional planning; in year 4, HCA will hire a Chief Academic Officer (CAO); and by Year 6 when the school enrolls students in 6th grade, a Middle School Principal will become a member of the Instructional Leadership Team. At capacity, the Instructional Leadership Team will consist of a CAO; Lower School and Middle School Principals; Assistant Principals; Special Education Coordinator; EL Specialist; Counselor; Social Worker; Director of Enrollment and Community Outreach; IT Director; and School Nurse. The CFO and COO will attend financial planning meetings as needed. See **Attachment 18** on pages 370-377 for a list of Leadership Team job descriptions, qualifications, and roles and responsibilities.

The CEO/Superintendent will hire the Year 1 Instructional Leadership Team members in Spring of 2022, by April. Timing is critical because the leadership team, once hired, can work together to recruit the remainder of the year one educators to ensure team chemistry and buy-in. The HCA Board, understanding how critical it is to hire strong instructional leaders, will grant resources to the CEO/Superintendent for advertising in national publications, attending hiring events sponsored by charter schools, classical education, and independent school organizations and support the process in any way necessary. Staff recruitment is budgeted at $15,000 for both year 0 and year 1 for this reason (*see financial workbook, assumptions tab, line 112)*. Furthermore, we will reach out to university master's degree programs for school leaders in training and will use social media marketing to create awareness for the opportunity to build a new model in an area where there are many underserved student populations.

Specific job responsibilities and qualifications for each Instructional Leadership Team member position are outlined in **Attachment 18** on pages 370-377. ALL Instructional Leadership Team members must have a strong belief in the values of HCA, a belief that all children can achieve at high levels, and a desire to serve children from underserved communities. While classical education experience would be a plus, the minimum bar would be to believe in the potential of the classical education model in being able to serve all students well. Moreover, leaders who represent the community we aim to serve will also be heavily considered because research shows that representation matters for students. Representation not only supports positive role models but brings a deep understanding of the cultural experiences of students from minority backgrounds (Diversifying the Teacher Workforce, edited by Christine E. Sleeter, et al., Taylor and Francis, 2014. ProQuest Ebook Central).

The initial phase of the hiring process will include an application screening process, reference checks, and phone and/or live interviews. The second phase of the hiring process for final candidates will include a full-day visit including interviews with Board members and staff as they are hired, group meetings with a few committed parents and community members to see how candidates interact with constituents, and demonstration lessons as appropriate. If there are safety concerns with travel or meeting in-person, final interviews will be conducted via zoom.

The HCA Board is ultimately responsible for the education results of the school, but delegates authority to the CEO/Superintendent for execution of the education plan. The CEO/Superintendent is ultimately responsible for administration and ensuring that the educational program is implemented in an excellent manner. The Lower School Principal is responsible for overseeing curriculum instruction and assessment and making certain that the teachers are well-versed in using data to inform and adjust instruction. The Lower School Principal will work with the part-time IT Director to purchase or develop software to make data analysis easy for the teachers. The Special Education Coordinator, with

oversight from the Lower School Principal, will ensure that all regulations are followed regarding SPED students and that the least restrictive environment is available to all SPED students and IEPs are developed in a timely manner, followed, and goals are met. The EL Specialist, two bilingual teachers, and Master Teachers for each grade will ensure that EL and ESL students are properly identified and supported with appropriate diagnostic assessments and curriculum and instruction. The Director of Enrollment and Community Outreach will have knowledge of the target community and will seek out partnerships to support the school and will be responsible for meeting enrollment targets. ALL members of the Instructional Leadership Team will interact positively with parents and community members, engaging them in the life of the school.

Support and Development of Instructional Leadership Team

As discussed in the PD Section on pages 92-94, the Instructional Leadership Team will be supported through a two-week summer PD lead by BCSI and the CEO/Superintendent, a one-week training from experts from the Children's Learning Institute, Neuhaus Center, and APQC, as well as monthly PD built into the school year's calendar and three days at the end of school. The instructional team travels to Hillsdale College in subsequent years for a one-week PD; HCA covers travel expenses and BCSI covers food and lodging. Classroom visits, student academic achievement data review, instructional rubrics, and internal and external evaluation, including CEO/Superintendent and Board evaluation, will aid in the development, support and evaluation of the Leadership Team. Please see **Attachment 19,** pages 378-382 for HCA Instructional Leadership evaluation tools.

Attachment(s):

18: Job Descriptions and Qualifications of School's Instructional Leadership Team
19: Tool(s)/Process to Evaluate Members of the School's Instructional Leadership Team

Proposed Financial and Operations Leadership Teams

(This section adapted from the Proposed Financial and Operations Leadership Teams on pages 71-71 in the HCA GEN 25 charter application.)

Qualifications for Implementing the Financial Plan Successfully. HCA will continue to grow the strong financial team it has created with the vision to always put students first with all decisions in operations and finance. The Founding Board includes lawyers, accountants, educators, experienced business owners, and experts in finance and banking. (See **Attachment** 12 pages 287-352). Stuart Saunders, Board President and an experienced banker, financial manager and business owner and Richard Hendee, business owner with accounting skills, will comprise the first Board Finance/Audit Committee and will offer excellent advice and support to the CEO/Superintendent who will hire HCA's first CFO. The CFO, alongside the Finance/Audit Committee and the CEO/Superintendent, will oversee budget management, financial management, any debt management, PEIMS data entry, and accounting and internal controls. Board leaders with expertise in finance will also be critical members in the hiring of the CFO to ensure that he/she/ has the right skillset and background. HCA will also hire a part-time Director of Enrollment and Community Outreach who will report directly to the CEO/Superintendent, who, as the "face" of the new school, will support meeting enrollment targets and work closely with the Board Development Committee to raise funds. The CFO will purchase software for donor and grant tracking. At full-scale, the HCA Financial Team will consist of a CFO, PEIMS Manager, data entry clerk, Director of IT, and an HR Director.

Qualifications for Proposed Financial and Operations Teams. Qualifications for Financial and Operations Teams are presented in **Attachments 20,** pp. 383-385 **and 21**, pp. 386-389. In Year 1, the CEO/Superintendent and CFO will oversee general operations, as the Chief Operating Officer (COO) will be hired part-time in Year 3 that will transition to full time in year 4. At this point, the COO will assume all operations duties that the CFO needs to take care of in Year 1. The Finance/Audit Committee will oversee facility acquisition and negotiating long-term leases, assuming any debt to cover facility acquisition, and any necessary remodeling/renovations to bring the selected facility up to code. Once the facility is acquired, contractors are hired, and plans are developed, the CFO and CEO/Superintendent will oversee the execution of the renovation plans, reporting regularly to the Finance/Audit Committee about progress. Long-term, the Board will continue to oversee facility acquisition and major capital investments that are made to ensure quality facilities at an affordable price for the school. As the school reaches full capacity, the Operations Leadership Team will consist of a COO, Facilities Manager, Food Service Manager, and a range of full-time, part-time employees and vendors (to be determined based on cost efficiencies) for custodial services, food service, security,

maintenance, and transportation. The Operations Team will work closely with the Financial and Instructional Leadership Team to prioritize instruction and ensure that operations team supports the smooth functioning of the school so that teachers can focus on instruction and the students. The CFO will be responsible for all contract development with external vendors; the COO will ensure that these contracts are managed effectively. The Board and the HR Manager, under the supervision of the CEO/Superintendent and CFO, will oversee contract management; policy development and implementation; and school safety. The Director of Enrollment and Community Outreach, under the guidance of the CEO/Superintendent, will oversee student recruitment and enrollment. An electronic student record system from ESC 20 will most likely be used per the TEC §7.010 requirement to satisfy the standards approved by the commissioner. The PEIMS Manager, in charge of reporting data in PEIMS, will join the staff in Year One and will finalize the selection of the student information system software to ensure compliance.

PEIMS Manager. HCA Board members fully understand the importance of hiring a capable PEIMS Manager as per TEC §12.104(b)(2)(A), all data must be reported through PEIMS. Moreover, if information about ADA is underreported, HCA will not receive full funding, which could result in lower funding and hence hurt the success of students and the school. Therefore, HCA will hire a PEIMS Manager in Year 1 with the following qualifications: Bachelor's degree; at least two years prior experience as a PEIMS manager in another school; and excellent references about timely and accurate submission of PEIMS data. (See **Attachment 20** on page 385 for additional information.) The proposed starting salary will be $55,000 to ensure that HCA can attract a very qualified candidate. The PEIMS Manager will report to the CFO and will be responsible for: 1) all data submissions through PEIMS; 2) producing reports on PEIMS data to the CFO who will share these with the CEO/Superintendent and Board; and 3) providing training to school staff including teachers and the office manager on data collection and PEIMS requirements. When the school reaches full capacity, HCA will hire a data entry clerk who will report to the PEIMS Coordinator. HCA will receive training from Region 4 Education Service Center in Houston that covers topics such as Texas Education Data Standards, Student Attendance Accounting Handbook, and other topics relevant to PEIMS data submission. The HCA financial budget includes funds in the PD budget for the CFO and PEIMS Coordinator to attend trainings on PEIMS at Region 4 in Year 1 and will allocate PD funds as needed in Years 2 through 5 to ensure that the PEIMS Coordinator and CFO stay current on this important function (see **Attachment 32**, pp.476-481).

Attachment(s):

20: Qualifications and Responsibilities for Proposed Financial Team
21: Qualifications and Responsibilities for Proposed Operations Team

Performance Management

(This section adapted from the Performance Management Section on pages 72-74 of the HCA GEN 25 charter application.)

Planning and Tracking Academic, Financial, and Operational Performance Indicators
Given the responsibility of the board to hold educators accountable for results, there will be continued monitoring of school and student performance. The HCA Board and Leadership Team will use the Charter School Performance Framework as a tool for planning and decision-making to continually self-assess the overall health and viability of the school. (Adapted from TEA Charter School Performance Framework 2018, page 5). In June of each year, the Board will hold a one-day retreat with the Leadership Teams participating for half of the day to review the academic, financial, and operations data and set clear, measurable goals for the year. After each academic reporting period, NWEA MAP testing and TPRI in the fall, spring STAAR testing, and TPRI EOY results, the Board and Instructional Leadership Team will review the academic performance goals against actual results. Financial and operations metrics will be reviewed monthly by the Finance/Audit Committee and the full Board. The following table outlines the key performance indicators that HCA will track:

INDICATOR	**Metric**	**Goal**	**Threshold for Corrective Action**
ACADEMIC			
Required Indicators			
Overall School Rating (A-F)	School Rating	A	B
STAAR Tests (data disaggregated by grade, class, subgroups (SPED, FRL, EL, G/T)	Masters Meets or Above Approaches or Above Growth	55% 75% 90% 30% annual	45% Masters 60% Meets 80% Approaches
EL/LEP TELPAS	Proficiency	85% proficient	65% proficient
Special Education IEP Goals	Met IEP Goals	85%	65%
Gap between groups	Gap Analysis	Less than 10%	15% gap
TPRI and Acadience (K-2)	Percent Developed	90% Developed	70% Developed
Additional Indicators			
NWEA MAP	Growth from BOY to EOY	25% growth	15% growth
Student Engagement	Discipline Referrals Attendance	40 discipline Referrals;	50 referrals

		0% difference in subgroup referrals 98% attendance	10% difference in referral rates among groups 95% attendance rate
Character Development	Panorama SEL Survey	Annual growth on 1 to 5 scale score of .6	Below .3 growth on scale score
Mastery of Subject Content as tracked in Mastery Track	Percent Mastery of Subject Content	90%	70%
Health and Fitness	Performance on Presidential Youth Fitness Assessment	90% achieve top fitness levels	70%
School Climate	Satisfaction of parents and community partners on school climate	4.2 average score on survey results on 5-point scale	3.5
FINANCIAL			
Accurate budgeting	Variance between budget and actual; PEIMS ADA	Less than 5% variance	More than 5% variance overall; 15% variance in any one category
Competitive Salaries	Comparison with surrounding charter and districts	5% higher salaries than other schools (Years 3-5)	Below 2% higher
Short-term solvency	Cash balances	Cash reserves 5% of budget	Below 5%
Short-term solvency	Ratio of Current Assets and Liabilities	1.5 or less	Below 1.5
Long-term solvency	Revenues exceed expenses; debt service coverage ratio (DCSR)	10% revenue reserves; DCSR of 1.2	DCSR less than 1.2
OPERATIONS			
Security Systems	Malfunctions	0	Any incidence -- systems check

Administrative Cost Ratio	% of Funds for Administration	15%	20% requires action
Compliance with requirements for: teacher credentials; SPED; bilingual ESL; CTE (middle school); Board and leadership training, criminal record checks, TREx usage, certificate of occupancy, 50% of students in tested grades	Requirements Met	All requirements met and documented annually	Any requirements not met will be addressed immediately
Child safe-guarding training	Completion	100% of staff	No exceptions
Timely filing of PEIMS data, government reports, and 990s to ensure nonprofit status	On Time	100% on time	No exceptions
Secure Assessment Process	Security Breaches	0	1 security breach

HCA will create a dashboard that will allow the team to constantly track these metrics to ensure the overall success of the school.

Continuous Improvement and Corrective Action. APQC, an internationally recognized expert in process improvement and quality tools, will consult with the Leadership Teams to establish the systems, continuous improvement, and user-friendly dashboards to indicate when the Board or member of the Instructional, Financial or Operations Leadership Teams needs to take corrective action. As outlined in the Effective Schools Framework Lever 1, the Board and Leadership Teams will have clear roles and responsibilities related to the indicators outlined above. In the first two years, the CEO/Superintendent and Lower School Principal will have responsibility for taking corrective action for any academic performance indicators, with support from all teachers and SPED Coordinator and EL Specialist in implementing the necessary strategies to meet student outcome targets. The CFO will be responsible, with the Board Finance/Audit Committee, for taking corrective action needed for any financial indicators. The CEO and CFO will be responsible for any corrective actions needed for the operations performance indicators. The HCA staff members will keep the Board fully informed of any deficiencies and needed corrective actions.

HCA plans to purchase or develop a software tool that will create a dashboard including each indicator, metric, goal and threshold related to academic, financial, operations and overall performance that supports inputting the critical data and then automatically signaling, using red, yellow and green as indicators – whether the goal is met, has a

warning, or needs immediate attention. This information is reviewed regularly by staff, and any indicators that are yellow and red are brought to the appropriate staff members and reported in monthly meetings to the Board.

Board members expertise, capacity to lead and related experience

HCA is fortunate to have committed Board members with expertise in academics, finances, and operations. Chelsea Collins, Head of School at St. Luke's Episcopal School in San Antonio and Kathryn van der Pol, a former Latin instructor at St. John's School for 17 years, will lead the effort in reviewing Academic Performance Indicators, enlisting the support of a consultant versed in charter school metrics and required state testing to support their review and development of plans for improvement. Stuart Saunders, with experience in management, real estate, banking and finance, Richard Hendee, also with experience in finance, and Debra Schindler, an experienced businesswoman, will lead the team that will refine and review the financial performance indicators and recommend new systems to improve financial performance. Mano de Ayala, successful lawyer with a prestigious Houston firm, and Richard Hendee, a successful business leader, will oversee the review of the metrics related to the operations performance indicators. Both have expertise in understanding government regulations and the importance of compliance and timely reporting. See **Attachment 12** on pages 287-352 for full bios of each of these Board members.

Talent Management and Development

Talent Management

(This section adapted from the Talent Management Section pages 75-76 of the HCA GEN 25 charter application.)

Recruiting Strategies, Plans, Timetable and Evaluation
The heart of a great school is great teachers who can serve the needs of all students. These teachers need to be supported by an excellent Instructional Leadership Team and a strong Operations Team that can run the school smoothly so teachers can focus on instruction. The following timetable and process will yield an outstanding school team to launch a new school in August 2022.

October 2021: The Board HR Ad Hoc Committee, comprised of Stuart Saunders, Board President and Debra Schindler, Board member, both of whom have extensive business and management experience, will meet with the new CEO/Superintendent to review and refine the job descriptions in **Attachments 18, 20 and 21**, confirm salary ranges, and the process for recruiting, being careful to meet all the requirements specified by TEA. This team will also develop screening rubrics by which to evaluate applicants for the various positions.

December 2021: The CEO/Superintendent will post jobs for the staff to be hired in the first year: teachers, including two bilingual teachers (certification required) and two teachers with ESL certification, part-time specialists, Special Education Teacher and Coordinator (certification required), CFO, and part-time Director of Enrollment and Community Outreach. These jobs will be posted at Hillsdale College, Houston Baptist University, UT Austin, Texas A& M, University of Houston, Rice University, Vanderbilt Peabody School of Education and other prominent teacher preparation programs in the U.S., Teach for America, and others. HCA will post these job opportunities through social media – the school's Facebook and website; and job search websites such as Indeed. The CFO position will be posted on the Texas Association for School Business Officials site. In addition, the CEO/Superintendent will network these job descriptions within the BCSI charter school community and the best independent schools and charter schools in Texas and attend any hiring fairs that could yield good applicants. Applicants will be required to submit a cover letter indicating why they are a good fit for the new school; resume; college transcripts; two letters of recommendation; student performance results from schools in which they have taught; and five individuals to contact for references.

February to May 2022: The CEO/Superintendent and HCA community members will conduct thorough interviews. Each teacher applicant will spend a full day interviewing with the CEO/Superintendent; several parents who have committed to the school; community leaders when available; and two Board members. Each teacher will conduct a demonstration lesson with children of parents who have committed to the school and, when possible, submit a video of their teaching in their current school. The CFO candidates will be interviewed by the CEO/Superintendent, two Board members with financial backgrounds, and a successful CFO at an independent or charter school in Houston. The CEO/Superintendent has final authority over all hiring decisions.

March to June 2022: The CEO/Superintendent will send offer letters to the candidates selected and, once the candidates have accepted their offer, an HCA orientation manual.

June 2022: The HR Ad Hoc Committee and the CEO/Superintendent will evaluate the recruitment and selection process with the following metrics: 1) number of qualified applicants for each position; 2) successful hiring of experienced, certified bilingual teachers and teachers with ESL certification for each grade and an outstanding certified Special Education Teacher and Coordinator; 3) analysis of recruitment strategies (social media, networking, job posting placements, etc. that yielded the strongest applicants in order to improve the recruiting process for Year 2; and 4) number and percent of staff who accepted the offer and signed a contract. HCA holds the highest standards for staff employment, and if these were not met in the recruitment process, the HR Ad Hoc Committee and CEO/Superintendent will refine and improve its process for Year 2, soliciting feedback from the staff who went through the process to better inform their decision-making. All kindergarten, first grade teachers and the Lower School Principal must complete a reading academy before August 2022-23.

Procedures for Hiring and Dismissal

As stated above, HCA has a very rigorous hiring process that includes extensive information from the applicant, an all-day interview process evaluated with screening protocol, demonstration lessons, and checks on at least three references. Prior to making an offer, HCA will conduct both a criminal background check and a check on the academic credentials from the applicant's university(s). The offer letter/contract, which will be for one year only, will contain information about job expectations and requirements, and an annual salary. The contract will be signed by the CEO/Superintendent and the new staff member. HCA will establish a clear staff evaluation and dismissal policy that will include immediate dismissal for confirmed sexual harassment and moral turpitude. Any teacher involved in racial discrimination with a student, parent or other staff member will be immediately disciplined and, if such behavior continues, will be dismissed from the school. If the behavior is extremely offensive and unacceptable, the staff members may be dismissed immediately. Teachers will be formally evaluated twice a year with a rubric developed by the CEO/Superintendent and the HR Ad Hoc Committee by August 2022,

based on the Teacher Evaluation Tool in **Attachment 24**, pp. 452-457. It is the intent of HCA to support its teachers extensively, and if possible, give them two years to be successful before dismissal. However, HCA will only retain those teachers who exhibit qualities of excellence in and out of the classroom, and who consistently perform well on the evaluation rubric. The instructional, financial, and operations team members will undergo an annual performance review with job specific rubrics upon which they will be evaluated.

Strategies Utilized in the Event of Unforeseen Staff Shortages

HCA plans to hire a dynamic CEO/Superintendent who will spend more than half of his/her time in Years 0 and 1 recruiting teachers and other staff. This is THE most important task the CEO/Superintendent will perform, in addition to meeting enrollment targets. It is the quality of these staff members who will then inspire families to enroll their children. Also, the CEO/Superintendent will be the type of person people want to work for with enthusiasm. Therefore, we do not anticipate any shortages for staff positions in Year 1. However, to ensure that we are prepared, HCA will begin in November 2021 to build a data bank of potential substitute teachers who will also go through criminal background checks and academic credential checks. In addition, HCA will develop a bank of temporary agencies and vendors, also well vetted, that can supply security personnel, receptionists, food service workers, custodians, and other operations staff should a vacancy occur due to a dismissal, maternity or paternity leave, or other emergencies.

Employee Benefits and Incentive Structures

HCA will provide all employees with a health benefits package including medical and dental (8.25%); payroll taxes, Medicare, state unemployment, and worker's compensation insurance (2.58%); retirement in TRS (8.0% increasing to 8.25%); and the opportunity to participate in an employee incentive pool (1.25%) tied to team performance of achieving student achievement goals, additional responsibilities such as a Master Teacher, and other metrics to be defined. The total benefits package is 20.08% of salaries Year 1. HCA offers 10 sick days per year that can accumulate over two years. In addition, HCA will offer 6 weeks of unpaid maternity or paternity leave, or unpaid leave to care for a terminally ill family member; accumulated sick leave may be used toward these absences.

Strategy for Retaining High-Performing Teachers (adapted from HCA GEN 25 application pages 81-82)

High performing teachers need the following: 1) opportunities for growth and advancement in instructional leadership; 2) flexible PD to hone specific skills; 3) useful, frequent feedback from the principal and CEO/Superintendent; 4) a sense of empowerment and a feeling that they are not micro-managed; 5) a collaborative working environment with respected colleagues; 6) easy access to useful data to help students improve; and 7) support from all areas of the school to enable the school to run smoothly

so that he/she can focus on instruction. The Lower School Principal and CEO/Superintendent will create the systems and culture to meet the needs of high performing teachers. HCA will hire great financial and operations teams so that the school runs efficiently and effectively and purchase software to enable easy data dashboards on student performance. The Lower School Principal will provide frequent, targeted, specific and actionable feedback to high performing teachers after their observations and invite teachers who are less seasoned to come and observe these excellent faculty members. Based on the feedback, high performing teachers will be excused from some uniform HCA PD that they have already received, will have access to online training that will meet their needs, and will receive stipends for travel to attend specialized trainings and to visit other high performing classical education schools in Years 2 and 3. High performing teachers who have not yet received their master's degree may be eligible for scholarship funds to attend schools such as Relay/GSE (https://relay.edu/)and others of their choice by Year 3, as more funds are raised by the HCA Board. As funds allow, HCA will either adopt or adapt the principles of the TAP System (see https://www.niet.org/our-work/our-services/show/the-tap-system-for-teacher-and-student-advancement that allows for differentiated roles for high performing teachers, including Master Teacher status with increased responsibilities and increased compensation as a result. All these structures will assist HCA in retaining its highest performing teachers.

Attachment(s):

22: Staffing Chart

23: Supplemental Human Resources Information Forms for Each Staffing Chart Position

Professional Development and Evaluation

(This section adapted from the Professional Development and Evaluation Section pages 77-79 from the HCA GEN 25 charter application.)

Professional Development. Prior to school opening, PD will be conducted uniformly and externally by BCSI, APQC, the Children's Learning Institute, and Neuhaus Center as well as internally by the HCA CEO/Superintendent, Special Education Coordinator, ESL Specialist and Master Teachers. Core components of summer PD will include foundations of classical education; BCSI school policies; classroom management; pedagogy; literacy training; curriculum instruction with a focus on ELAR, math, science, and history; strategies for recognizing and addressing dyslexia by the Neuhaus Center; the use of diagnostic reading assessments such as TPRI and Acadience Reading by the Children's Learning Institute; and HCA policies and procedures. Because teachers consistently complain about poorly run meetings and have little understanding of process improvements, HCA will include in the PD schedule a one-day session with APQC trainers on effective meetings and process improvement. The primary summer PD components -- carefully cultivated over the years by BCSI through researched best-practices and experiential refinement -- focus on the basic and foundational principles that will ensure the effective implementation of HCA's classical educational program, mission, and vision. As the school year unfolds, and the HCA CEO/Superintendent and Master Teachers have a chance to evaluate teacher performance and student achievement data, PD will be individually tailored as necessary, delivered by Master Teachers or external consultants, to ensure all teachers are performing at HCA's high standards. Uniform PD will be dispensed for all new teachers until individual, tailored PD is appropriate and/or required.

Summer PD Schedule. Three weeks prior to opening, all staff will participate in a 10-day summer PD led by BCSI and the HCA CEO/Superintendent to ensure that teachers are well prepared to teach the curriculum, conduct progress monitoring, and provide strategies to meet the unique needs of all students, particularly EL and SPED students and students with disabilities. Training on Diversity, Equity and Inclusion (DEI) will also be included. All topics will have a component related to EL students and students with disabilities.

Days	Topics Covered	How Teachers Will Be Trained
Day 1	• Foundations of Classical Education • Curriculum Overview	Lecture with PowerPoints and videos for all teachers.
Day 2	• Basic Policies of a BCSI School • Classroom Management • Basic Pedagogy • Science Instruction and Curriculum	All teachers will spend the majority of Day 2 together to receive the outlined overview of each topic.

	• History Instruction and Curriculum • ELA Instruction and Curriculum	
Day 3	• History • Science • ELA	In Day 3, teachers will split up by grade level to cover specific grade level materials.
Day 4	• Philosophy of Mathematics • Distinctives of Classical Singapore Math: Number Bonds • Distinctives of Classical Singapore Math: Place Value • Distinctives of Classical Singapore Math: Bar Models	This session will be very interactive, as teachers themselves will be working some of the very problems that their students will be exposed to.
Day 5	• Singapore Math in Practice: Developing a Yearly Plan • Singapore Math in Practice: Developing a Weekly Plan • Singapore Math in Practice: Developing a Daily Plan • Math Review: Resources, Ability Grouping, Q & A	Teachers will have the opportunity in this session to develop their yearly, weekly and daily plans and understand the process of creating flexible ability groups.
Days 6-9	• Basic Literacy Training • Working with EL students • Supporting SPED students in developing literacy • Use of data to inform instruction • DEI training	Teachers will have the opportunity in this session to develop their yearly, weekly and daily plans and understand the process of creating flexible ability groups based on data.
Day 10	• Unique School Policies and CEO/Superintendent Expectations	Lecture and PPTs for all staff.
Day 11	• Effective Meetings and Process Improvement by APQC	Highly interactive and participatory training with role playing, practice, and problem-solving as a group
Day 12	• Use of diagnostic reading assessments by the Children's Learning Institute; • Strategies for recognizing and addressing dyslexia by the Neuhaus Center	Hands-on training to familiarize participants with Acadience and TPRI; interactive training by Neuhaus Center
Day 13-15	• Home visits and setting up classrooms	

During the three weeks prior to the opening of school, teachers will be expected to make home visits to each child and his or her families. As detailed in the **Start-up Plan, pp. 107-108,** $47,578 in salaries have been allocated for teachers, specialists, and aides for three weeks of PD prior to the start of school.

PD Days and Hours Outlined. BCSI Training will be provided at Hillsdale College annually for one week each summer for teachers. HCA is responsible for travel expenses; BCSI covers lodging and food. These expenses are included in the budget. In addition to BCSI-led summer PD (40 hours), the equivalent of 9 days (63 hours) of PD will occur throughout the school year, including three PD days at the end of the regular school year. Weekly PD and data analysis, scheduled during monthly early release days, will inform data-driven decision making and allow for collaboration and common planning. At full capacity, the CEO/Superintendent, CAO, Principals and Assistant Principal will develop the HCA on site PD schedule, in conjunction with BCSI, based in large part on the data of students as they progress toward mastery in each subject area. Master teachers and teachers with special expertise will deliver some of the training and external consultants will be utilized.

Teacher Evaluation and Support. Teachers will be supported, developed, and evaluated throughout the school year through student achievement data collected and analyzed weekly; monthly collaborative PD sessions including deep data-dive session; and one-on-one mentoring sessions with Master Teachers and the Lower School Principal scheduled as needed. The Teacher Evaluation Tool in **Attachment 24,** pp. 452-457**,** shows the categories on which teachers will be evaluated. Between the Lower School Principal and CEO/Superintendent, teachers will be visited informally in their classrooms twice a month at a minimum. They will be formally evaluated twice a year – once in the fall and then in the spring. If teacher performance is deemed unsatisfactory through data analysis or evaluations, additional support will be provided through more intensive mentoring from Master Teachers, sending the teacher to a workshop that would address the deficiencies, and support from external consultants. Parent complaints of individual teachers are noted and will be addressed by the Lower School Principal and, if necessary, the CEO/Superintendent; but they are not the basis for any immediate action against a teacher unless the behavior is related to moral turpitude. Again, HCA will make every effort to give teachers two years to succeed.

Attachment(s):
24: Teacher Evaluation Tool(s)

Operational and Financial Plans

School Calendar and Schedule

(This section adapted from the School Calendar and Schedule Section pages 83-85 in the HCA GEN 25 charter application.)

Attachment 25 provides the HCA proposed annual calendar for the first year of operation in 2022-23. The year begins with 3 weeks of teacher PD, August 1 to August 19, conducted by BCSI, APQC, Neuhaus Center and the Children's Learning Institute to familiarize teachers with HCA's classical education model, a deep understanding of scientifically-based reading instruction and assessments to identify dyslexia and monitor reading progress, APQC's training in effective meeting and process improvement, and HCA's policies, practices and Aristotelian core virtues. Faculty will make visits to the home of each child in his/her classroom during these three weeks. This extra PD aligns with the proposed education program as all new teachers will be well versed in HCA's expectations and the classical education curriculum and instruction. Faculty will be fully compensated for this extra time as detailed in the Start-up Plan on pages 107-108,

Annual School Calendar. The school calendar aligns with those of surrounding school districts in terms of holidays (Labor Day 9/5/22; Indigenous Peoples' Day 10/10/22; Thanksgiving Break 11/21-25; Winter Break 12/19/22 to 1/02/23; Martin Luther King Day 1/16/23; Spring Break 3/13-3/17/23; Good Friday 4/14/23; and Memorial Day 5/29/23). The last day of school will be June 2, 2023. Teachers will have three days of PD, year-end review, and planning for the coming year June 5-7, 2023. One-half day (early dismissal) will be allocated each month for grade level collaboration, deep data-dives to identify students who need additional support, and additional PD as needed. Parent/Teacher conferences are scheduled approximately every 12 weeks, but teachers with students who are struggling will meet with parents as needed, but every six weeks at a minimum. The proposed calendar includes more instructional days (180) beginning in Year 2 with one extra week and a longer school day (7.5 hours ending at 3:30 p.m. for K-5 and then 8 hours for grades 6-8 ending at 4:00 p.m.) than either HISD or Spring Branch, for a total of 77,850 minutes in Year 1 and 80,100 minutes in subsequent years exceeding the state required instructional minutes of 75,600. These provisions in the yearly calendar and daily schedule that allow for more time on task for students and teacher PD support HCA's goal of all students reaching mastery levels in reading, math, and core subjects.

Daily and Weekly Student Schedules (Attachment 26). HCA will have students in grades K-1 in the first year. Early drop off begins at 7:45 with breakfast served at 8:00 a.m.

for FRL students; other students may begin their day at 8 a.m. with reading in the classroom or individual tutorials. Since morning is the best time for deep work in the core subjects, HCA begins its instruction in literacy promptly at 8:15 a.m. HCA varies from the traditional 90-block schedules in reading and math by allowing 160 minutes for literacy and 100 minutes for math and spreading out literacy and math throughout the day in smaller blocks. The long 60-minute blocks for literacy and math occur in the morning when children are most alert. The HCA schedule will have rotating A and B days, creating some variety for students during each week. A typical schedule for a first-grade student at HCA on an B Day will consist of an hour block of literacy starting at 8:15 a.m. followed by a 20-minute Math Number Talk, followed by a 20-minute literacy module such as Handwriting and then a 30-minute period with specialists such as Art or Music teachers. Students then have an hour block of Math followed by 30 minutes of Science, taught by a science specialist once a week; then a 20- minute block of Literacy such as Phonogram review, followed by a 40-minute lunch and recess period. The afternoon begins with a 20-minute Math Facts review, followed by a 30-minute block with a specialist (Music, Art of P.E) or some days recess, and then 30 minutes each of ELA Literature and History/Geography. The school day wraps up with a 30-minute period for reading practice, intentionally put at the end of the day so parent volunteers who are picking up their children can participate, and a 10- minute Classroom Forum – a time for the class to share any news, focus on one of HCA's virtues, recap the day, and even have parent volunteers talk to the students about their careers (never too early). Note that restroom breaks will be taken intermittently as needed and are not shown in the schedule. The school day ends at 3:30, but many students will continue in the after-school program that will be offered in partnership with the YMCA Houston. Facilitators in the Y program will support students with homework, and there will be opportunities for students to practice their literacy and math skills with phonogram and math facts cards as well as digital math, literacy, and SEL programs.

Each school day for students PK4-Grade 5 is 7.5 hours; for middle school it will be an 8-hour day starting at 8am and ending at 4pm; PK3 which commences in Year 4 is half-day. During each school day at the elementary school level, 6 hours and 20 minutes (84%) of the school day is devoted to academics including specialists in art, music, Science, Spanish, and Health/P.E. as academic topics are woven through the specialists' curriculum. The core academic subjects comprise **320 minutes**, or 71% of the school day of 450 minutes.

This daily and weekly schedule for students supports the proposed rigorous educational program by: 1) allocating sufficient time for literacy and math instruction; 2) including blocks of time for science with a specialist and history/geography that are often

overlooked in elementary schools; and 3) providing ½ extra hour every day to enable more time on task to master the material and time with Specialists such as art and music.

Teacher Daily and Weekly Schedule. All teachers are expected to arrive by 7:45 a.m. and leave no earlier than 4 p.m. Teachers will be on a rotating schedule to greet students as they arrive starting at 7:45 a.m., and all teachers will participate in dismissal at the end of the day. Classrooms for K and 1 are self-contained, so the teacher schedule follows the student schedule with these important exceptions: 1) the placement of specialists in the school schedule will enable a common planning period each day for adjacent grades (e.g. 1st grade will have a common planning period with K and 3rd grade) of at least 30 minutes to enable horizontal and vertical planning. In addition, HCA will organize the specialists' schedules so that there is one additional 30-minute planning period for each classroom teacher during the day, which may or may not coordinate with other teachers. Classroom teachers will be expected to eat with their students at least three times per week; aides or parent volunteers will cover the other two days. Once a month, there will be an early release date, enabling all teachers in the school to meet for PD, common planning, and data analysis, to identify any struggling students and to develop interventions.

This daily and weekly schedule supports HCA's educational program because it puts the teacher in the classroom with the students for the vast majority of the day, engaged in instructional activities; enables collaborative planning time to promote horizontal and vertical alignment of the curriculum and data analysis; and allows for additional planning time for the teachers each day.

Although not required, the daily and weekly school schedule in **Attachment 26** includes both K and Grade 1 students on a rotating A and B schedule.

Attachment(s):

25: Proposed School Calendar (Annual)
26: Proposed School Schedule for Day and Week: Teacher and Student Version

Student Recruitment and Enrollment

(This section adapted from the Student Recruitment and Enrollment Section pages 86-88 in the HCA GEN 25 charter application.)

Student Recruitment and Marketing Efforts

HCA's proposed facility will be located in one of the following zip codes – 77018, 77088, 77091, or 77092 – which were selected based on the need for high quality school options in an area that represents diversity, and to align with the Families Empowered Demand Survey conducted between June 3 and July 29, 2019 (see **Attachment 4**, pp.154-174). The demographics of the respondents in this survey were: 86% Hispanic; 8% African American; 4% White; and 2% Asian. To meet our enrollment projections, the CEO/Superintendent and Board members will need to specifically recruit low-income families, African American and Hispanic families, and families with SPED students.

The HCA Board will form an Ad Hoc Marketing/Recruiting Committee, comprised of Debra Schindler and Kathryn van der Pol, to work with the CEO/Superintendent to refine and execute the following student recruitment and marketing plan to ensure full enrollment in grades K and 1 by August 2022.

STRATEGY	DATES	PERSON RESPONSIBLE	SUPPORT
1. Apply Houston: List HCA with Families Empowered and Apply Houston – make applying easier	9/15/2021	CEO/Super-intendent	Families Empowered
2. High Quality Engaging Video: Development of a high-quality video with images of enthusiastic students and parents to use on the website and in presentations.	9/15/2021	CEO/Superin-tendent and Marketing/ Recruiting Committee (MRC)	Marketing/ Recruiting Committee and contract firm
3. Social Media Campaign – Facebook, Instagram, mobile-friendly school website with bi-weekly blogs	9/15/2021 to 8/15/2022	CEO/Super-intendent; Director of Enrollment; MRC	Contract website support
4. Ads and PR: Monthly ads in local newspapers and radio; interviews with CEO/Superintendent and Board members featured in local radio and television; Plans for an interest story in lifestyle section of	9/15/2021 to 8/15/2022	CEO/Super-intendent and MRC	Contract PR firm

Chronicle about partnership with HBU.			
5.Speaking Events: CEO/Superintendent speaks at community events and at organizations such as Rotary, local Chambers, etc.	10/1/2021 to 8/15/2022	CEO/Super-intendent, MRC, Board members	Advisory Board members
6. Networking with community organizations in target zip codes: WIC Clinics, YMCAs, Chambers, churches, etc.	9/1/2021 - 8/15/2022	CEO/Super-intendent, MRC, Board	Advisory Board members
7. Meeting with Early Childhood Centers: One-on-one meetings with leaders of early childhood centers that do not offer K – excellent source of new students	9/1/2010-4/1/2022	CEO/Super-intendent, MRC, Board	
8. Meetings with Charter Schools that may be oversubscribed: One-on-one meeting with leaders of charter school that are at capacity.	10/1/2021 -4/1/2022	CEO/Super-intendent and Board	
8. Flyer Distribution: Flyers in English and Spanish distributed to apartment complexes, supermarkets, WIC clinics, churches,	10/1/2021 -6/1/2022	CEO/Super-intendent, MRC, Board and HCA families	
9. School Open Houses: Monthly open houses at the proposed new facility to meet CEO/Superintendent and Board	3/1/2022-8/1/2022	CEO/Super-intendent, MRC, and Board	Advisory Board and Committed Families
10. Informal Small Group Gatherings: Informal gatherings for coffees in the a.m. or desserts in the p.m. at the homes of committed families	2/1/2022-7/1/2022	CEO/Super-intendent, MRC, Board	Committed Families

The CEO/Superintendent and HCA Board will work with WIC clinics, YMCAs, charter schools that are oversubscribed, early childhood centers, and churches in the targeted area to identify students who would be a good fit for HCA. When possible, the CEO/Superintendent will make presentations to parents of these children at these organizations that they frequent. The best way to recruit these families is to come to them to demonstrate a commitment on the part of HCA to reach the most underserved families in their targeted areas. HCA will provide to families the Admissions Policy (**Attachment 27**, pp.464-466) through its website, electronic and hard copy mailings, as a handout at

presentations, and it will be included in the family information packets.

Metrics to Evaluate the Effectiveness of Recruitment Strategies

The Ad Hoc Marketing/Recruiting Committee will develop a simple matrix to evaluate the effectiveness of the recruitment strategies in Year 0 and Year 1 that will be reviewed, refined, and approved by the full Board. The matrix includes the following metrics:

Recruitment Strategy	**Reach**	**Effectiveness**	**Outcomes**
Each of the 10 Strategies	-- Attendance at Events -- Number of views of video on website --Number of Social Media Followers -- Number of flyers and location distributed -- Number of Ads placed -- Apply Houston website and SchoolMint tracking software	Through text, phone call, or on the application form, ask each applicant: "How did you find out about the school?" and link it back to recruiting strategy.	--Total number of applicants --Demographics of applicants --Applicants in Primary and Secondary Geographic Boundaries (Link outcomes as much as possible to recruiting strategies)

The CEO/Superintendent will present the student recruitment performance matrix at each Board meeting in Year 0 to enable the Board to assess progress toward goals and determine if any in course corrections are needed. If enrollment is not reaching capacity in Year 0 by May 1, the Board will enlist additional strategies that may include the following: placing ads in Value Coupon packages that are mailed to homes; additional paid ads in local news outlets in the targeted zip codes and local radio, in particular ads in African American, Asian, and Hispanic owned newspapers; placing flyers in local businesses as allowed; additional open houses; and additional small gatherings for coffee or dessert in the homes of families who have enrolled to assist with recruitment of their neighbors' children.

Based on the analysis of the Reach, Effectiveness, and Outcomes of the Recruiting Strategies in Year 0, the Board will make adjustments to the recruiting strategies in Year 1, adjusting the timetable, adding new approaches such as more press releases to gain visibility in prominent new outlets such as the Chronicle, or dropping some strategies such as meeting with school leaders in charter schools that are oversubscribed.

Attachment(s) 27: The School's Admission and Enrollment Policy

Facility Acquisition

(This section adapted from the Facility Acquisition Section on pages 89-91 in the HCA GEN 25 charter application.)

1. Has the applicant identified a specific location for at least one campus in Year 1?	Yes ☐ No ☒

IF THE RESPONSE TO THE QUESTION ABOVE WAS "NO," SKIP TO THE NEXT SECTION, "FACILITY NOT IDENTIFIED."

Facility Identified

1. If the response to the question above was "yes," enter the physical address of the identified campus facility to be used during Year 1 in the box below.

Physical Address of Facility:	

2. Does the applicant currently own the property, plan to purchase it, or plan to lease it?
Currently Own ☐ Purchase ☐ Lease ☐

3. Has the building been issued a certificate of occupancy for educational use?	Yes ☐ No ☐

Enter narrative response to the prompts in this section of the application (if applicable). *Reference **Attachments 28-29** in the response.*

Facility Not Identified

1. Does the applicant intend to lease or purchase a property?
Lease ☒ Purchase ☐

Ideal School Facility. HCA has begun the process of locating an ideal facility that can accommodate the growing student body for at least five years. As stated earlier, the proposed location for the school will be in one of the following zip code areas: 77018, 77088, 77091, or 77092. HCA plans for the school to be located within HISD, but with relatively easy access for students from Spring Branch ISD and Aldine ISD. The specifications we are using for identifying the school location are as follows:

- Number of classrooms: Year 1:8; Year 2: 12 Year 3: 20: Year 4: 26: Year 5: 30.
- The ideal classroom size is 725 square feet for PK, K and 1 and 640 square feet for grades 2 and up.
- Common teaching areas will include an art room, music room and science room (minimum of 725 square feet each); a multipurpose space that can serve as a cafeteria, indoor PE, and auditorium (2500 square feet ideally); a library/reading area (900 square feet); a teacher workspace; and two small conference rooms where counselors, social workers, and teachers can have privacy.
- The school will need an outdoor playscape for grades K-3 and access to outdoor PE space – basketball court and soccer field.
- Office space will be needed for the following positions that will be filled in the first five years: CEO/Superintendent; CFO; COO; CAO; Director of Enrollment and Community Outreach; PEIMS Manager; IT Director; Nurse and the school leadership teams. Except for the CEO/Superintendent, Lower School, and Middle School Principals (office space will range between 80 and 120 square feet each), HCA remains open to the administrative offices being clustered in an open area with partitions separating the spaces.
- The facility will need adequate hallway space and bathrooms for adults and students according to state regulations.

We estimate that the square footage for the building, including mechanical/electrical room, hallways, bathrooms, classrooms, and office space will be 18,366 square feet in Year 1 and 44,820 square feet in Year 5.

HCA, as a classical education school, will serve students in self-contained classrooms; hence, the facility HCA is seeking will need classrooms that can comfortably

accommodate 22 students in PK, 24 students in grades K-4; and 25 students in grades 5-8. HCA also will provide from opening day instruction in music, art, science and health and physical education and will have excellent facilities for these purposes. Since reading is so fundamental to a classical education, HCA will start with a small general library in addition to classroom libraries and trips to the Houston public libraries ensuring that lack of access to quality, grade-level texts in multiple languages is not a barrier for any student. Technology plays a role in this classical education model as well. For example, students will watch documentaries in class, research primary texts, and use digital education tools to differentiate and extend lessons. Therefore, the school will have high speed internet, adequate broadband, and sufficient nodes in each classroom to ensure easy online access.

Plans for Identifying and Securing a Facility

HCA is already contracting with two experienced commercial real estate brokers, Lesa Nickelson French, J.D., and Meredith Cullen to locate the ideal school facility described above. Lesa has over 14 years of commercial real estate experience and was named the "Heavy Hitter in Office Leasing" in the Houston Business Journal. She has worked with many charter schools, locating space for Etoile Academy, Compass Rose Academy (multiple campuses), Elevate Collegiate, Houston Classical, San Antonio Prep, The Gathering Place, and Bloom Academy. Lesa has access to extensive market research on commercial real estate in the area and has already provided HCA with multiple commercial real estate surveys that have identified 65+ potential building lease options, 30+ potential church options, 8 potential land options and 15 potential building purchase options in HCA's most desired zip codes alone. With her 14+ years of experience, Lesa also brings to bear knowledge of the latest market comps and landlord concessions and numerous previous successful charter school negotiations. She also has an in-house researcher at her disposal, Meredith Cullen of Cullen Real Estate, who specializes in non-advertised properties and therefore stays close to neighborhoods and develops business by working locally and meeting businesses face to face to determine if they are good prospects for his clients. He and his team also have charter school experience with Beta Academy and Idea Public Schools as well as many commercial clients. The combination of these experienced and knowledgeable individuals and their companies provide us the best approach for finding the right facility for HCA.

HCA aspires to locate a facility within the next four months to be able to present to TEA and the SBOE during the interviews in May and June 2021. Lesa and Meredith will negotiate RFPs and LOIs on behalf of HCA to secure a financially viable facility. They will also subsequently work with HCA's counsel to ensure that the LOI terms are properly documented in the final lease or PSA.

Cost and time to build out HCA's facility is completely dependent on the type of facility secured. Lesa and Meredith will work with HCA's architect and GC to select a property that is most economical to complete to timely obtain a Certificate of Occupancy.

HCA is submitting a grant application for $775,000 for the Charter School Program has secured initial financing from the Saunders Foundation for the renovations for the facility. Any facility that HCA will secure will be renovated to meet all code requirements, including the Americans with Disabilities Act (ADA), and ensure that it has high speed internet Stuart Saunders will take out a line of credit on behalf of HCA to ensure ongoing financing for the facility in the event of challenges in meeting its operating budget.

Debra Schindler, a Board member with excellent business experience, is taking the lead on working with the real estate agent to locate the facility. She is actively supported in this endeavor by the Board President, Stuart Saunders, and Kathryn van der Pol, Secretary, who worked at St. John's School for 17 years and understands quality school facilities. HCA has not determined a contractor for the renovation build out phase. **HCA will NOT be within the third degree of consanguinity or affinity to the lessor or the contractor for the renovations.**

Transportation

(This section adapted from the Transportation Section on page 92 in the HCA GEN 25 charter application.)

General Transportation

Given HCA's mission to serve ALL students, HCA will ensure that lack of transportation is not a barrier that prevents any student from enrolling and/or getting to school on time on a daily basis. HCA will achieve this through a myriad of creative solutions.

First, HCA will work with partners to assess the needs of all accepted students. HCA will be locating its facility in an area that has a large base of students and HCA team members will help families create safe walking routes for all students living within 1.0 miles of the school. HCA will also work with families to create carpool options for students living in close proximity with each other. For students who are older or can be accompanied by an adult, Metro Houston passes will be made available to ensure that cost is not a barrier. Lastly, HCA has budgeted enough funds for one van in year one for students for whom none of the aforementioned options are feasible. This expense ramps up to approximately 5 vans in year 5 to ensure that even as the school grows, transportation is accessible (see financial workbook, assumption tab, line 107).

Furthermore, HCA will work with local and national partners to further the development of creative transportation solutions. Partners that HCA has already begun conversations with include: Good Reason Houston (https://goodreasonhouston.org/) that is exploring transportation solutions for charter schools such as the use of an uber like app HopSkipDrive (https://www.hopskipdrive.com/); 4mativ (www.4mativ.org) that is a start-up organization providing comprehensive support to schools; and other Houston-based charter schools that would be willing to share transportation services and routes. HCA has also initiated conversations with two bus service companies, First Student Inc. and Goodman Bus Services, to determine pricing for various levels of student participation in HCA bus service. Students who elect to use any of the available transportation options will never be charged for this service.

Transportation for Students with Disabilities

Given its commitment to an inclusive school environment, HCA will provide bus service for all students with disabilities who choose to enroll in HCA in accordance with CFR 300.349 (c) (16) and has budgeted $20,000 for transportation in year 1 (*see financial workbook, assumptions tab, line 107*).

Transportation for Field Lessons and Sporting Events

HCA plans to have at least four field lessons per grade for upper elementary students, and individual teachers may have additional outreach activities for their students. For grade level or all school field lessons, such as to the Houston Children's Museum, HCA will contract with a bus service such as Student First Inc. or Goodman Bus Service to transport students. These expenses are an estimated $25,144 by Year 5 to support the older elementary school students more heavily and has been budgeted in a field trips line item *(see financial workbook, budget tab, line 106*). For smaller class events, the school van will be available and any adults responsible for transporting will be covered under liability insurance (*see financial workbook, budget tab, line 125)*. When HCA has students in grades 6-8, it will begin a competitive sports program and will provide bus service to and from these athletic contests. This is not included in the budget as middle school will start in the 6th year of the school's launch.

Start-up Plan

(This section adapted from the Start-Up Plan Section on pages 93-94 in the HCA GEN 25 charter application.)

Start-Up Budget

The revenue for the Start-up Year is **$615,000** which includes funds from CSP and a grant from the Saunders Foundation and several Board members. The anticipated costs for the start-up year are **$606,902** and include administrative and instructional personnel, contracted services, operations, facility renovations and rent, and contingency.

As soon as HCA is authorized, the board will make an offer to a CEO in the pipeline. That leader will then be on salary for 11 months during year 0 while other leaders and teachers will join at various times prior to start of year. HCA has budgeted for the following administrative personnel: $113,750 for the CEO/Superintendent salary for 11 months; $13,750 for the Lower School Principal; $16,667 for the CFO; $4,583 for the PEIMS Manager; $10,000 for the Director of Enrollment and Community Relations; $5,333 for the Special Education Coordinator; $5,400 for the EL Specialist; and $3,753 for the Office Manager for a total of **$192,575.** The instructional personnel costs include $27,255 for teachers; $16,215 for the specialist teachers; and $4,108 for the Aides for a total of **$47,578** for three weeks of PD before the start of school. HCA has budgeted for one custodian for three weeks prior to school at $1,975. All staff expenses in the start-up year will have benefits and payroll taxes for a total of $45,593.

School operations include Board expenses at $1,000, FF&E at $67,500, $25,500 for student and staff marketing/recruitment; and $5,000 for staff development from Neuhaus Center, Children's Learning Institute, and APQC and some travel/office expenses. The two weeks of PD by BCSI in the summer of 2021 is provided at no cost to HCA. School operations total is **$101,500**. Start-up budgeted contracted services include $1,440 for payroll, $2,400 for accounting services, and $575 for D&O insurance for a total of **$4,415.**

Facility costs include $3,167 for insurance; $20,500 for rent; $2,600 for utilities and internet, and $175,000 for facility renovations for a total of **$201,267.** All facilities renovations will be only what is required to ensure that the school building complies with occupancy regulations. The budget includes a contingency of **$12,000**.

Total estimated start-up costs are $606,902 including $12,000 for continency, leaving a balance of $8,098. This start up budget can be found in the financial workbook, in the Tab Start-up, Year 0 Assumptions.

Board Monitoring

The Finance/Audit Committee will meet monthly with the CEO/Superintendent during the start-up year to compare budgeted expenses to actual costs, ultimately reporting the findings to the Board President. At each Board meeting, scheduled to occur ten (10) times during the start-up year, the Finance/Audit Committee will report on the implementation of the start-up budget to keep all Board members informed of the budget execution. If the CEO/Superintendent or Board Members feel a change is needed in the budget allocation due to unforeseen circumstances, the Board will follow the designated protocol to: 1) cut costs if possible; 2) raise more funds for the start-up year and/or; 3) utilize the contingency plan outlined in the Budget Narrative in **Attachment 33**, pp.476-481.

Full-time Start-Up Staff

HCA's CEO/Superintendent will work on a full-time basis for 11 months in the start-up year to lead the development of the school. Working closely with BCSI and the HCA Board, the CEO/Superintendent will manage, execute, and oversee all tasks outlined in the Detailed Start-up Plan outlined in **Attachment 30,** pp. 469-472**,** including refining the financial plan, reporting to the Board, hiring all staff, marketing the school and enrolling families, community outreach, development of the facilities, grant writing and fundraising, professional development, and developing all systems: calendars, financial systems,, student and staff handbooks, and management systems. As discussed above, the CEO/Superintendent's salary has already been allocated for the start-up year and will be supplied through the Saunders Foundation grant and projected CSP grant that is shown in **Attachment 33, Budget Narrative,** on pages 476-481 and the CSP addendum.

Attachment(s):

30: Detailed Start-Up Plan

Financial Planning

(This section adapted from the Financial Planning Section on pages 95-98 in the HCA GEN 25 charter application.)

1. Identify the fiscal year for the **sponsoring entity**.	
July 1-June 30 ☒	September 1-August 31 ☐
2. Identify the fiscal year for the proposed **charter school**.	
July 1-June 30 ☒	September 1-August 31 ☐

Systems, Policies and Processes for Financial Planning
The HCA Board is ultimately responsible for establishing the systems, policies, and processes the school will use for financial planning, accounting, purchasing, and payroll. It is also responsible for hiring an outstanding CEO/Superintendent. As the new CEO/Superintendent hires its instructional, financial, and operations leadership teams, he/she will work collaboratively with these individuals to develop excellent procedures and internal controls to establish compliance with all financial reporting requirements of the Board and the state and to ensure the long-term sustainability of the organization. In developing its systems for financial planning, HCA has drawn from the Texas Charter School Quality Framework and Best Practices in School District Budgeting developed by the Government Finance Officers Association (See https://www.gfoa.org/best-practices-school-district-budgeting) to develop a seven-step planning process:

Step 1: Develop a Fiscal Principles and Policies Manual for financial planning, internal controls, and execution that will be approved by the Board annually.

Step 2: Establish instructional priorities, **the key driver of the budget**, informed by student performance data, teacher and instructional staff input, and scientific research on instructional strategies.

Step 3: Develop a strong partnership between the finance, instruction, and operations teams to ensure that improving instruction is the focused priority in budget development but has the necessary systems in place to support instruction.

Step 4: Apply cost analysis and staffing and enrollment projections to determine funding

and resource allocation to achieve the instructional priorities.

Step 5: Develop a three-to-five-year projected budget that is updated annually using this process and determine how success in budget implementation will be measured.

Step 6: Determine roles and responsibilities in implementing the budget.

Step 7: Monitor progress in budget implementation and evaluate results against instructional priorities.

Internal Controls, Compliance and Reporting

The HCA Board takes its fiscal responsibility role seriously and will implement the following procedures related to the **annual budget, internal controls, external controls, funding, and transparency**:

Annual Budget

The annual budget will be developed by the Finance/Audit Committee in partnership with the Leadership Team using the process outlined above. It will include all required items by TEA and approved by the full Board no later than June 20, 2022 prior to the start of school and published according to state requirements.

Internal Accounting Controls

1) Actual expenses and revenue versus budget will be analyzed and reported to the Finance/Audit Committee by the CFO and then the full Board on a monthly basis to allow for in course corrections with trigger indicators such as more than 5% variance in revenue or expenses, cash reserves below 5% of the annual operating budget, and a 10% dip in applications during enrollment; 2) the Board will develop and review quarterly thresholds for spending that do not require board approval, such as an initial threshold of $2,000, and thresholds such as $1,000 that will require two signatures from the CFO and CEO/Superintendent; 3) the Board will establish and review semi-annually financial controls for any employees who handle cash or checks for donations or school operations to ensure that there are multiple people signing off on collections and deposits; 4) the CFO will develop a tracking system, using excel or software, to manage all school inventory; 5) as funds become available, the school will purchase software to track restricted and unrestricted donations from philanthropic sources and make sure they are coded separately from government funds (*Note: this section adapted from Gen 24 Neighborhood Schools application, page 108.)*

External Accounting Controls

The HCA Board will hire Blazek & Vetterling, a nationally recognized accounting firm specializing in schools and nonprofit organizations, to conduct an annual external audit.

Funding, Reserves, Contingency, and Debt

1) The budget will include a positive cash flow each month, reserves at the end of the year, and a contingency line estimated at two percent of revenue; **2)** the CFO will review ADA, WADA and the funding amounts from TEA and compare them to the projected budget; **3)** when the school assumes any debt, the Board will review any debt service coverage ratios (DSCR) to ensure all debt covenants are being met.

Roles and Responsibilities for Finances for Administration and Governing Board

The HCA Board, as stated earlier, has the ultimate responsibility for school finances and will develop a Fiscal Principles and Policies Manual. The Board has created a Finance/Audit Committee, whose first members are Stuart Saunders and Richard Hendee, Board members with extensive financial and banking experience. The Finance/Audit Committee Chair is the Treasurer of the Board, and he/she will co-sign checks for payments above the threshold, initially $2,000, set by the Board. The Finance/Audit Committee, working with the CEO/Superintendent and the CFO, is responsible for developing the budget and recommending it to the Board for approval. The Development Committee, which will be established in Year 0, is responsible for fundraising and ensuring that there are sufficient philanthropic dollars to add additional revenue to the bottom line and meet any unexpected budget deficits. The CEO/Superintendent supports the development efforts by making calls with the Board members.

The CEO/Superintendent and the CFO are responsible for implementing the budget and managing all day-to-day operations, overseeing the correct inputting of the ADA into the PEIMS system that is so critical for funding. Prior to the monthly Board meeting, the CFO presents to and discusses with the Finance/Audit Committee any variances in the revenue and expenses and recommends any actions to be taken. The Treasurer then presents this information to the full Board, with the CFO present to answer questions. The CEO/Superintendent and the CFO are responsible for ensuring that all internal controls and other fiscal policies set by the Board are followed.

Financial Transparency

The annual budget will be approved by the Board in an open meeting posted at least seven days in advance on the HCA website and the school will also email the announcement of the open meeting to the school community, SBOE members, state

representatives in the geographic boundaries, and representatives at the TEA charter school division. Once approved, the annual budget will be posted on the school website where it will remain in place for three years, distributed via email to the school community and SBOE and state representatives, and filed electronically in its original and amended form as required by TEA. In addition, the annual audit and summary financials (**Attachment 34**, pp. 495-497) and 990 that is filed with the IRS (**Attachment 36**, pp. 501-532) will be available to the school community.

Contracted Services

In Year 1, HCA will contract with vendors for the following services: 1) food service for breakfast, lunch, and snacks for students on FRL and light supper for all families for major school events; 2) payroll; 3) legal services; 4) Special Education Services; 5) Directors and Officers Insurance; 6) substitute teacher pool; 7) nurse services; and 8) annual external audit. To date, the only vendor that has been selected is Blazek & Vetterling for the annual audit. The financial workbook (see financial workbook, assumptions tab, lines 81-91) that was submitted electronically has these estimated annual costs for these contracted services: Food service: $157,850; Payroll: $ 5,300; Legal: $ 5,000; Special Education Services $15,000: substitute teacher pool: $15,000; D&O insurance: $975; nurse services: $3,500; annual audit: $10,000 for an estimated total of **$212,625.** The Budget Narrative in **Attachment 32**, pp. 476-481, provides additional details. The Finance/Audit Committee, in partnership with the CEO/Superintendent and CFO, will create a process for selecting vendors in accordance with the provisions of TEC, Chapter 44, Subchapter B and in accordance with the Board's Conflict of Interest Policy. The process will include formal requests for proposals (RFPs) and the vetting of respondents to the RFP using rubrics developed by the Finance/Audit Committee. Final contracts will be reviewed by the Board Treasurer and legal counsel and approved by the full Board.

Fundraising Efforts

The HCA Board plans to add several new board members with fundraising experience between Jan 21, 2021 and May 202 to create a Development Committee that will be responsible for fundraising and cultivating relationships with local and national foundations. Currently, Stuart Saunders is leading the fundraising efforts, and thus far he has secured a grant if needed of $1 million from the Saunders Foundation and $23,00 from other individuals (**Attachment 33**, pp. 482-494). One hundred percent of the Board has committed to the initial fundraising effort and will continue to do so. HCA has budgeted very conservatively in this grant application but would like to offer additional amenities such as transportation services, more field lessons, and more opportunities for

staff to travel to other high performing classical education schools as more funds become available.

Insurance

The HCA Board plans to purchase and provide the following insurance with these estimated costs: General liability -- $1,000; Sexual and Physical Abuse Liability -- $1,000; Non owned auto -- $400; Umbrella policy -- $ 4,500 for a $5 million umbrella policy; Professional liability -- $1,500; Director's and Officer's liability -- $691 (currently in place); Property -- $1500 (.30 per $100 on $50,000 contents); Workers compensation -- $3,770 - $5,940 (based on $943,000 payroll). Additional insurance for the new facility cannot yet be estimated.

Attachment(s):

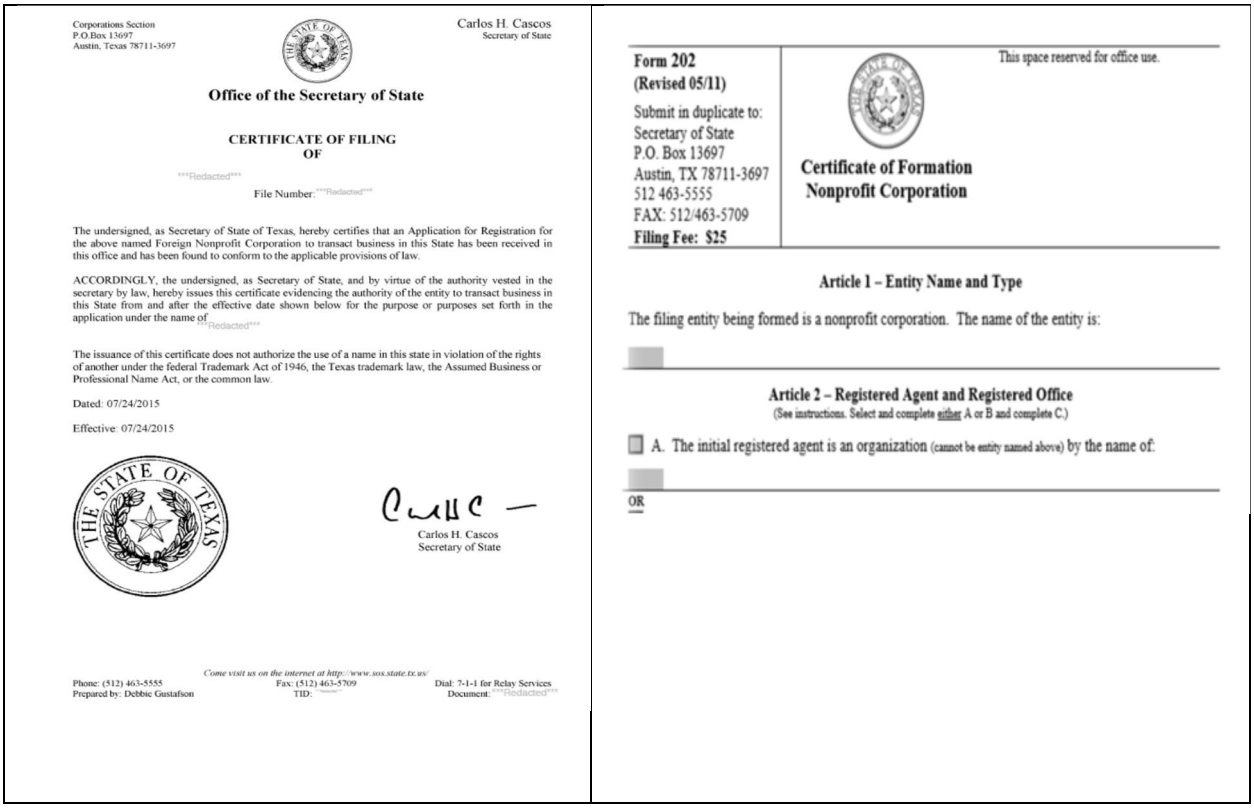
31: Financial Plan Workbook
32: Budget Narrative
33: Evidence of other Financial Support
34: Audit Report
35: Credit Report
36: IRS Form 990, Form 990-N

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 20, 2021.**

Texas Certificate of Filing **Texas Certificate of Formation**



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

Carlos H. Cascos
Secretary of State

Office of the Secretary of State

CERTIFICATE OF FILING
OF

Redacted

File Number: ***Redacted***

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.

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 ***Redacted***

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.

Dated: 07/24/2015

Effective: 07/24/2015

Carlos H. Cascos
Secretary of State

Come visit us on the internet at http://www.sos.state.tx.us/

Phone: (512) 463-5555 Fax: (512) 463-5709 Dial: 7-1-1 for Relay Services
Prepared by: Debbie Gustafson TID: ***Redacted*** Document: ***Redacted***

Form 202
(Revised 05/11)

Submit in duplicate to:
Secretary of State
P.O. Box 13697
Austin, TX 78711-3697
512 463-5555
FAX: 512/463-5709
Filing Fee: $25

This space reserved for office use.

Certificate of Formation
Nonprofit Corporation

Article 1 – Entity Name and Type

The filing entity being formed is a nonprofit corporation. The name of the entity is:

Article 2 – Registered Agent and Registered Office
(See instructions. Select and complete either A or B and complete C.)

☐ A. The initial registered agent is an organization (cannot be entity named above) by the name of:

OR

HERITAGE
CLASSICAL ACADEMY

January 13, 2021

Commissioner Mike Morath
Texas Education Agency
1701N. Congress Avenue
Austin, TX. 78701

Re: Heritage Classical Academy —Corporate Name Change

Dear Commissioner Morath,

I am writing in an effort to avoid any confusion about the corporate name of the sponsoring entity for Heritage Classical Academy.

Several years ago I formed a Texas nonprofit corporation named EnterpriseU. When the decision was made to apply for a charter school in the name of Heritage Classical Academy, it was decided to change the name of the nonprofit corporation from EnterpriseU to Heritage Ed. Attached is copy of a Certificate of Filing from the Texas Secretary of State with evidence of the corporate name Heritage Ed [formerly: EnterpriseU].

To the extent that our application contains any records, old tax returns, or other documentation in the name of EnterpriseU, please know that EnterpriseU and Heritage Ed are one in the same. The name was changed on December 14, 2018.

Sincerely,

Stuart Saunders

Stuart D. Saunders
President

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

David Whitley
Secretary of State

Office of the Secretary of State

CERTIFICATE OF FILING
OF

Heritage Ed.
File Number: 802101685
Assumed Name:
Heritage Classical Academy

The undersigned, as Secretary of State of Texas, hereby certifies that the assumed name certificate for the above named entity has been received in this office and filed as provided by law on the date shown below.

ACCORDINGLY the undersigned, as Secretary of State, and by virtue of the authority vested in the secretary by law hereby issues this Certificate of Filing.

Dated: 04/29/2019

Effective: 04/29/2019

David Whitley
Secretary of State

Form 503
(Revised 09/13)

Return in duplicate to:
Secretary of State
P.O. Box 13697
Austin, TX 78711-3697
512 463-5555
FAX: 512 463-5709
Filing Fee: $25

Assumed Name Certificate

This space reserved for office use.

FILED
In the Office of the
Secretary of State of Texas
APR 29 2019
Corporations Section

Assumed Name

1. The assumed name under which the business or professional service is, or is to be, conducted or rendered is: Heritage Classical Academy

Entity Information

2. The legal name of the entity filing the assumed name is:

Heritage Ed.

State the name of the entity as currently shown in the records of the secretary of state or on its organizational documents, if not filed with the secretary of state.

3. The entity filing the assumed name is a: (Select the appropriate entity type below.)

- ☐ For-profit Corporation
- ☑ Nonprofit Corporation
- ☐ Professional Corporation
- ☐ Professional Association
- ☐ Limited Liability Company
- ☐ Limited Partnership
- ☐ Limited Liability Partnership
- ☐ Cooperative Association
- ☐ Other

Specify type of entity. For example, foreign real estate investment trust, state bank, insurance company, etc.

4. The file number, if any, issued to the entity by the secretary of state is: 802101685

5. The state, country, or other jurisdiction of formation of the entity is: Texas

6. The entity's principal office address is:

602 Sawyer Street, Suite 720
Street or Mailing Address

Houston	TX	USA	77007
City		*Country*	*Postal or Zip Code*

Period of Duration

☑ 7a. The period during which the assumed name will be used is 10 years from the date of filing with the secretary of state.

OR

☐ 7b. The period during which the assumed name will be used is _____ years from the date of filing with the secretary of state (not to exceed 10 years).

OR

☐ 7c. The assumed name will be used until _____ (not to exceed 10 years).
mm/dd/yyyy

County or Counties in which Assumed Name Used

8. The county or counties where business or professional services are being or are to be conducted or rendered under the assumed name are:

☐ All counties

☐ All counties with the exception of the following counties: _____

☑ Only the following counties: Harris

Execution

The undersigned signs this document subject to the penalties imposed by law for the submission of a materially false or fraudulent instrument and also certifies that the person is authorized to sign on behalf of the identified entity. If the undersigned is acting in the capacity of an attorney in fact for the entity, the undersigned certifies that the entity has duly authorized the undersigned in writing to execute this document.

Date: 4-22-19

Signature of a person authorized by law to sign on behalf of the identified entity (see instructions)

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

Jose A. Esparza
Deputy Secretary of State

Office of the Secretary of State

CERTIFICATE OF FILING
OF

Heritage Ed.
802101685

[formerly: EnterpriseU]

The undersigned, as Deputy 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 Deputy 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: 12/14/2018

Effective: 12/14/2018

Jose A. Esparza
Deputy Secretary of State

FILED
In the Office of the
Secretary of State of Texas

DEC 14 2018

Corporations Section

AMENDED AND RESTATED

CERTIFICATE OF FORMATION

OF

ENTERPRISEU

a Texas Nonprofit Corporation

This Amended and Restated Certificate of Formation of EnterpriseU (the "Corporation") is being adopted pursuant to Sections 3.057 and 3.059 of the Texas Business Organizations Code ("TBOC").

1. The name of the Corporation is EnterpriseU. The Corporation hereby adopts this Amended and Restated Certificate of Formation. Each new amendment has been made in accordance with the provisions of the TBOC. Each amendment has been approved in the manner required by the TBOC and by the governing documents of the Corporation. This Amended and Restated Certificate of Formation accurately states the text of the Corporation's Certificate of Formation being restated and each amendment to the Certificate of Formation that is in effect, as further amended by this Amended and Restated Certificate of Formation. This Amended and Restated Certificate contains no other change in any provision thereof other than omissions allowed by TBOC Section 3.059.

2. In Article I, the name of the Corporation has been amended.

3. In Article V, the provision regarding the incorporator has been deleted in its entirety and subsequent Articles have correspondingly advanced, with the former Article VI becoming Article V. In the new Article V, the provision regarding membership has been amended to provide for no members.

4. In Article VI, the purposes have been amended.

5. In Article VIII, the description of the Board of Directors has been amended, and the number, names, and addresses of the initial directors have been deleted and replaced with the current directors.

6. In Article IX, the provision regarding dissolution has been amended.

7. In Article XII, the provision regarding amendment has been deleted in its entirety and replaced with a provision on nondiscrimination.

8. The initial Certificate of Formation of the Corporation and any amendments thereto are hereby superseded by the following Amended and Restated Certificate of Formation that accurately copies the entire text thereof, including any previous amendments and any amendments described above:

ARTICLE I

NAME OF CORPORATION

The name of the corporation (the "Corporation") is Heritage Ed.

ARTICLE II

TYPE OF CORPORATION

The Corporation is a nonprofit corporation.

ARTICLE III

DURATION

The period of duration of the Corporation shall be perpetual.

ARTICLE IV

REGISTERED AGENT

The address of its initial Registered Office in the State of Texas is: 602 Sawyer Street, Suite 720, Houston, Texas, 77007, and the name of its initial Registered Agent at said address is: Stuart D. Saunders.

ARTICLE V

MEMBERSHIP

The Corporation shall have no members.

ARTICLE VI

PURPOSES

The Corporation is organized exclusively for charitable, religious, educational and scientific purposes within the meaning of Sections 501(c)(3), 170(c)(2)(B), 2055(a)(2) and 2522(a)(2) of the Internal Revenue Code of 1986, as amended or the corresponding section of any future federal tax code (the "Code"), including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under Section 501(a) of the Code by reason of description in Section 501(c)(3) of the Code. The Corporation's purposes shall include, but not be limited to, operating a charter school in the State of Texas, which will be a school within the meaning of Section 170(b)(1)(A)(ii) of the Code. To enable the Corporation to carry out such purposes, it shall have the power to do any and all lawful acts and to engage in any and all lawful activities, directly or indirectly, alone or in conjunction with others, which may be necessary, proper or suitable for the attainment of any of the purposes for which the Corporation is organized.

ARTICLE VII

PROHIBITED TRANSACTIONS

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to its directors, trustees, officers, or other private persons within the meaning of Section 501(c)(3) of the Code, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article VI hereof.

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 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, within the meaning of Section 501(c)(3) of the Code.

Notwithstanding any other provisions of these Articles, the Corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income tax under Section 501(a) of the Code by reason of description in Section 501(c)(3) of the Code, or (2) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Code.

At any time the Corporation is a private foundation within the meaning of Sections 501(c)(3) and 509(a) of the Code, it shall not take any of the following actions:

a. engage in any act of self-dealing, as such term is defined in Section 4941(d) of the Code;

b. fail to distribute its income annually in an amount necessary to satisfy its minimum distribution requirement under Section 4942 of the Code;

c. retain any excess business holdings, as such term is defined in Section 4943(c) of the Code;

d. make any investments in such manner as to subject the Corporation to taxation under the provisions of Section 4944 of the Code; or

e. make any taxable expenditures, as such term is defined in Section 4945(d) of the Code.

ARTICLE VIII

BOARD OF DIRECTORS

The management of the affairs of the Corporation is vested in its Board of Directors.

The number of directors to constitute the initial Board of Directors is three (3). The number of directors thereafter will be as set forth in the Corporation's Bylaws, but at no time will this number be less than three (3).

The names and addresses of the persons who will serve as the initial directors until their successors are appointed or elected and will have qualified in accordance with the Corporation's Bylaws are as follows:

Stuart D. Saunders
602 Sawyer Street, Suite 720
Houston, Texas 77007

Mark H. Kieshnik
602 Sawyer Street, Suite 720
Houston, Texas 77007

Cathryn van der Pol
602 Sawyer Street, Suite 720
Houston, Texas 77007

ARTICLE IX

DISSOLUTION

Upon the dissolution of the Corporation, the Board of Directors shall, after paying or making provisions for the payment of all of the liabilities of the Corporation, distribute all of the assets of the Corporation to an organization or organizations organized and operated exclusively for charitable, educational, scientific or religious purposes that shall, at the time, qualify as an exempt organization or organizations by reason of description in Section 501(c)(3) of the Code. Any of such assets not so disposed of shall be disposed of by the District Court of the county in which the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations as said court shall determine, which are organized and operated exclusively for such purposes.

ARTICLE X

NO PERSONAL LIABILITY FOR CORPORATE DEBTS

A director of the Corporation shall not be liable to the Corporation for monetary damages for any act or omission in the director's capacity as a director, except that this Article X does not limit the liability of a director for: (a) a breach of a director's duty of loyalty to the Corporation, (b) an act or omission not in good faith or 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 a director received an improper benefit whether or not the benefit resulted from an action taken within the scope of the director's, or (d) an act or omission for which the liability of a director is expressly provided for by an applicable statute. If the TBOC is amended to authorize action further eliminating or limiting the personal liability of directors, then the liability of a director of the Corporation shall be eliminated or limited to the fullest extent permitted by such statutes, as so amended. Any repeal or amendment of such statutes or of the

foregoing paragraph shall not adversely affect any right of protection of a director of the Corporation existing at the time of such appeal or modification.

ARTICLE XI

INDEMNIFICATION

The Corporation shall indemnify and protect any director, officer, employee, or agent of the Corporation, or any person who serves at the request of the Corporation as a director, officer, employee, member, manager, or agent of another corporation, partnership, limited liability company, joint venture, trust, employee benefit plan, or other enterprise, to the fullest extent permitted by the laws of the State of Texas.

ARTICLE XII

NONDISCRIMINATION

The Corporation will admit students of any race, color, national and ethnic origin to all the rights, privileges, programs, and activities generally accorded and made available to students. It does not and will not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admission policies, scholarship and loan programs, and athletic and other school-administered programs.

[Signature Page Follows]

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

Date: NOVEMBER 30, 2018

Stuart D. Saunders, President

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 20, 2021.**

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 **April 8, 2021**, 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: MAY 20 2016

ENTERPRISEU
C/O ALICIA M KIRKPATRICK
900 W 48TH PL STE 900
KANSAS CITY, MO 64112

Employer Identification Number:
35-2520438
DLN:
17053102324006
Contact Person:
STEPHANIE L JONES TAYLOR ID# 31395
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
June 30
Public Charity Status:
170(b)(1)(A)(vi)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
November 14, 2014
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.

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.

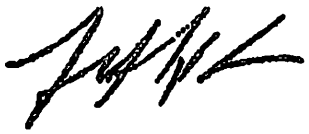
If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to 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.

Letter 947

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

Sincerely,



Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements

Letter 947

Attachment 3: Applicant Information Session Documentation

Provide the *Proof of Attendance* documentation the applicant received via email for completing an Applicant Information Session attended in October or November 2020. Applicants must also complete all of the Mandatory Application Information Session Presentations found on the Subchapter D New Operator Application page and provide the *Certificate of Review Documents*.[1]

The Texas Education Agency (TEA) hosted identical Applicant Information Sessions on October 30, 2020 and November 6, 2020. 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. The individual(s) with primary responsibility for preparing and submitting the application should also attend one of these required information sessions.

[1] https://tea.sharefile.com/d-sbbf281662674f0a9

From: **CharterApplication** CharterApplication@tea.texas.gov
Subject: TEA Generation 26 Charter Application Information: Confirmation of Attendance
Date: November 13, 2020 at 2:49 PM
To: CharterApplication CharterApplication@tea.texas.gov
Cc: Garland, John John.Garland@tea.texas.gov

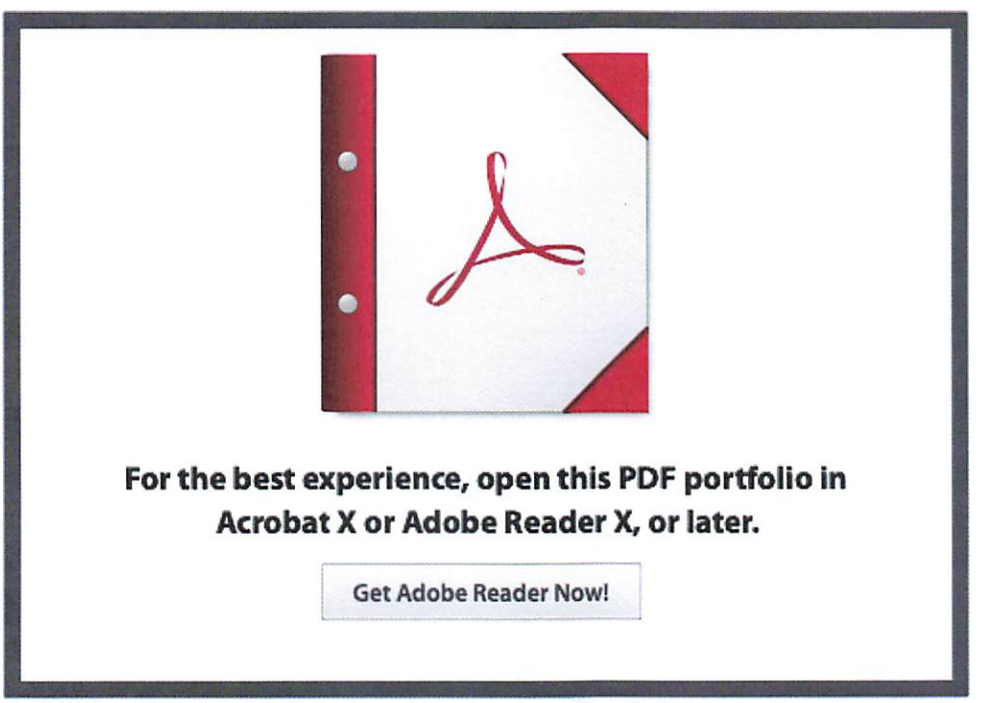
Hello,

This email is an official **Confirmation of Attendance** for the Generation 26 Application Information Session held on October 30, 2020. New Operators and Experienced Operators must print this email and include as Attachment 3: Applicant Information Session Documentation. Subchapter E applicants must print this email and include as Attachment 1. This email will fulfill the attendance requirement for your application submission. The printed copy that you submit must show both sender and recipient email addresses. We have attached an example to illustrate this submission requirement.

Please note, your application only requires one copy of this confirmation.

Sincerest Regards,

New Schools Team
Division of Charter School Authorizing and Administration
(512) 463-9575
charterapplication@tea.texas.gov
TEA Charter School Webpage



Print and Submit with Application

Generation 26 Application Certificate of Review

THIS ACKNOWLEDGES THAT

Stuart D. Saunders
Heritage Ed

SPONSORING ENTITY (NAME)

HAS REVIEWED

SELECTED LEGAL TOPICS.PPT

November 9, 2020

(DATE)

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THIS ACKNOWLEDGES THAT

Stuart D. Saunders
Heritage Ed

SPONSORING ENTITY (NAME)

HAS REVIEWED
CURRICULUM OVERVIEW.PPT

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Heritage Ed

SPONSORING ENTITY (NAME)

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SPECIAL EDUCATION.PPT

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Heritage Ed

SPONSORING ENTITY (NAME)

HAS REVIEWED

ENGLISH LEARNERS OVERVIEW.PPT

November 9, 2020

(DATE)

Print and Submit with Application

Generation 26 Application Certificate of Review

THIS ACKNOWLEDGES THAT

Stuart D. Saunders
Heritage Ed

SPONSORING ENTITY (NAME)

HAS REVIEWED

STATE ACCOUNTABILITY OVERVIEW.PPT

November 9, 2020

(DATE)

Attachment 4: Evidence of Community Demand

(This section contains evidence of support, agendas, meeting protocols and a Families Empowered Survey from Attachment 4 pages 116-157 in the HCA GEN 25 charter application.)

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) any additional documentation that demonstrates community demand for the proposed charter school.
- ***Meeting Agenda***. The formal agenda that was followed during each required 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.



DO YOU DESIRE AN EXCELLENT EDUCATION FOR YOUR CHILD?

Heritage Classical Academy, a proposed tuition-free public charter school, plans to open in your neighborhood in the Fall of 2021.

JOIN US FOR INFORMATION MEETINGS TO LEARN MORE!

TUESDAY, DECEMBER 3 • 6 - 7:30 p.m.
SATURDAY, JANUARY 11 • 9:30 - 11a.m.

WHITE OAK CONFERENCE CENTER
7603 Antoine Dr., Houston, TX 77088
Complimentary refreshments and childcare will be provided.

WHY CHOOSE **HERITAGE CLASSICAL ACADEMY?**

- **IT IS FREE.** No tuition for this world-class education.
- Provides a strong foundation in reading.
- First year is kindergarten and first grade, will grow to K-8.
- Before and after school care available.
- Music and art taught in lower grades.
- Speech therapy and other special needs support.

PLEASE RSVP
hcawhiteoak.eventbrite.com
or call us at: 713.914.9778

Like Us on Facebook:
Heritage Classical Academy Houston

HERITAGE CLASSICAL ACADEMY admits students of any race, color, national and ethnic origin to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admission policies, athletics and other school-administered programs.

Charter School Handout.indd 1 11/22/19 9:26 AM



¿DESEA UNA EXCELENTE EDUCACIÓN PARA SU HIJO?

Heritage Classical Academy, una escuela "Charter" pública gratuita, se propone abrir en Houston el Otoño de 2021.

¡ACOMPÁÑENOS A UNA REUNIÓN INFORMATIVA!

MARTES 3 DE DICIEMBRE • 6 - 7:30 p.m.
SÁBADO 11 DE ENERO • 9:30 - 11a.m.

WHITE OAK CONFERENCE CENTER
7603 Antoine Dr., Houston, TX 77088
Se proporcionarán aperitivos, bebidas y cuidado de niños de cortesía.

¿POR QUÉ ELEGIR **HERITAGE CLASSICAL ACADEMY?**

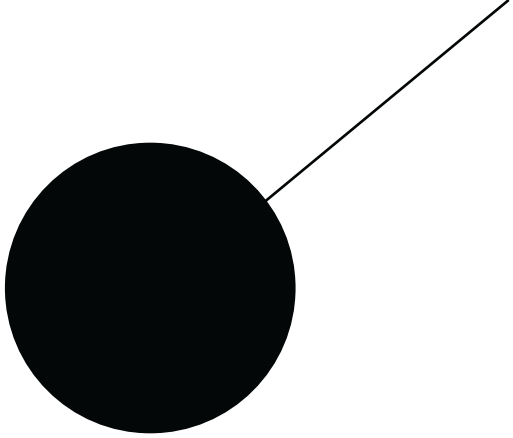
- **ES GRATIS**, no hay costo para esta escuela de clase mundial.
- Proporciona una base sólida en lectura.
- El primer año es de kínder a primer grado y se desarrollará de K-8.
- Cuidado para niños antes y después de la escuela estará disponible.
- Se enseñará música y arte desde los primeros grados.
- Terapia de lenguaje y otras necesidades especiales de apoyo.

Por favor RSVP
hcawhiteoak.eventbrite.com
o llámenos al: 713.914.9778

Danos un "me gusta" en Facebook:
Heritage Classical Academy Houston

HERITAGE CLASSICAL ACADEMY admite a estudiantes de cualquier raza, color, origen nacional y étnico a todos los derechos, privilegios, programas y actividades generalmente acordados o puestos a disposición de los estudiantes en la escuela. No discrimina por motivos de raza, color, origen nacional y étnico en la administración de sus políticas educativas, políticas de admisión, atletismo y otros programas administrados por la escuela.

Charter School Handout.indd 2 11/22/19 9:26 AM



Do you desire an excellent education for your child?

Heritage Classical Academy,
a proposed tuition-free public charter school, plans to open in your neighborhood in the Fall of 2021.

Join Us for Parent and Neighborhood Information Meetings to Learn More!

Tuesday, December 3 at 6-7:30pm
Saturday, January 11 at 9:30-11am

White Oak Conference Center
7603 Antoine Dr.
Houston, TX 77088

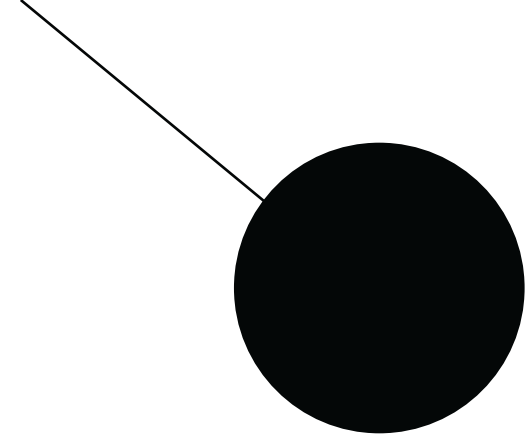
Complimentary snack and drinks
Free childcare will be provided
FREE t-shirts to the first 50 people

Why choose Heritage Classical Academy?

- IT IS FREE. No tuition for this world class education.
- Curriculum will rival the area's best private schools.
- Provides a strong foundation in reading.
- Will serve the families of our diverse, local community.
- First year is kindergarten and first grade, will grow to K-8.
- Teaching principles of moral character and civic virtue.
- Before and after school care available.
- Music and art taught in lower grades.
- Speech therapy and other special needs support.

RSVP: hcawhiteoak.eventbrite.com
Like Us on Facebook:
Heritage Classical Academy Houston

Heritage Classical Academy admits students of any race, color, national and ethnic origin to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admission policies, athletics and other school-administered programs.



¿Desea una excelente educación para su hijo?

Heritage Classical Academy,
una escuela "Charter" pública
gratuita, se propone abrir en Houston
el Otoño de 2021.

¡Acompáñenos a una reunión informativa para padres en nuestra comunidad!

Martes 3 de diciembre de 6-7:30pm
Sábado 11 de enero de 9:30-11am

White Oak
Conference Center
7603 Antoine Dr.
Houston, TX 77088

Aperitivos y bebidas de cortesía
Se proporcionará cuidado de niños gratuito
Camisetas gratis para las
primeras 50 personas

¿Por qué elegir Heritage Classical Academy?

- Es Gratis, no hay costo para esta escuela de clase mundial.
- Los planes de estudios rivalizan a las mejores escuelas privadas del área.
- Proporciona una base sólida en lectura.
- Servirá a las familias de la diversa comunidad local.
- El primer año es de kínder a primer grado y se desarrollará de K-8.
- Enseñaremos los principios de carácter moral y la virtud cívica.
- Cuidado para niños antes y después de la escuela estará disponible.
- Se enseñará música y arte desde los primeros grados.
- Terapia de lenguaje y otras necesidades especiales de apoyo.

RSVP: hcawhiteoak.eventbrite.com

Dale un "me gusta" en Facebook
Heritage Classical Academy Houston

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ARE YOU CONCERNED FOR YOUR CHILD'S EDUCATION?

LEARN ABOUT NEW OPTIONS IN YOUR NEIGHBORHOOD

[redacted]

Heritage Classical Academy, a proposed tuition-free public charter school, plans to open in your neighborhood in the Fall of 2021.



Strong foundation in Reading, Phonics, Literature, History, Math and Science

PARENT INFORMATION MEETING:

Saturday, January 11 at 9:30 - 11am

White Oak Conference Center

7603 Antoine Dr., Houston, TX 77088

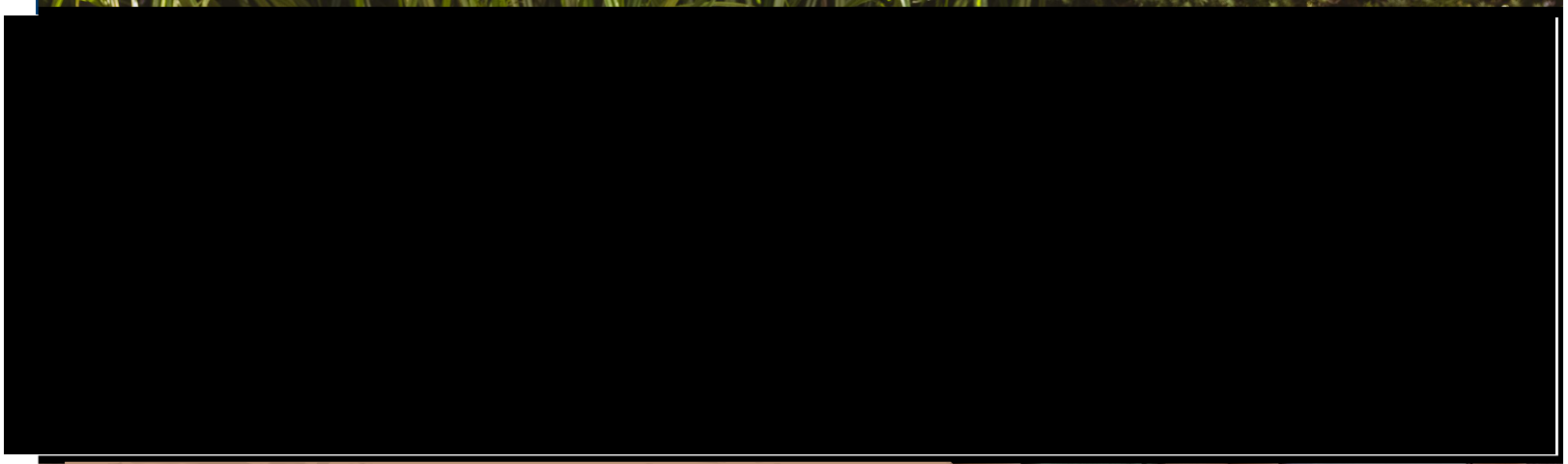
(Free childcare and refreshments will be provided)

RSVP: HCAWHITEOAK.EVENTBRITE.COM

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¿LE PREOCUPA LA EDUCACIÓN DE SU HIJO?

CONOZCA LAS NUEVAS OPCIONES EN SU VECINDARIO



Heritage Classical Academy, una escuela "Charter" pública gratuita, se propone abrir en Houston el otoño de 2021.



Sólidos fundamentos en lectura, fonética, literatura, historia, matemática y ciencia

REUNIÓN DE INFORMACIÓN PARA PADRES:

Sábado 11 de enero a 9:30 - 11am

White Oak Conference Center

7603 Antoine Dr., Houston, TX 77088

(Free childcare and refreshments will be provided)

RSVP: HCAWHITEOAK.EVENTBRITE.COM

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HERITAGE
CLASSICAL ACADEMY

SAPIENTIA ET VIRTUS
Wisdom and Virtue

1

What is Heritage Classical Academy?

- A tuition-free, co-educational, public charter school
- A non-profit 501(c)3 organization
- Planning to Open Fall 2021 with grades K-1 and adding a grade each year through grade 8

- Part of Hillsdale College's national Barney Charter School Initiative
- Uses the Classical Education method to provide a world-class education to prepare students for college and life
- Promotes a safe, positive, scholarly learning environment with high expectations
- Emphasis on developing knowledge and virtue

2

How will you ensure my child learns to read and write well?

- **Students will graduate with excellent reading, writing and speaking skills**
  - Explicit phonics and grammar instruction
  - Exposure to great classic literature and poetry
  - Frequent writing assignments, including research papers in middle school
  - Opportunities for public speaking in community meetings and in classroom and all school presentations
  - Response to Intervention (RtI) to differentiate instruction
  - *100% of the 1st grade class is reading prior to the second semester (based on experience in other BCSI schools)*
  - 2nd grade students learn cursive

3

What method will you use to teach math?

- **Students will graduate with a strong foundation in mathematical skills, concepts and problem-solving - and they will LIKE math!**
  - Singapore Math Curriculum (Singapore students rank # 1 in the world on international tests).
  - Sequential, systematic instruction
  - Ability grouping
  - Emphasis on problem-solving
  - Focus on Mastery



4

Will my child really know history and geography when they graduate?

- **Students will graduate with knowledge about Texas, U.S. and world geography and history and the founding principles of our republic.**
- Core Knowledge Curriculum for History and Geography
- Content-rich, connected curriculum
- Study skills such as outlining are directly taught.
- Use of original primary source documents.
- Reading good literature and biographies, not boring text-books!
- Socratic dialogue instruction – probing questions!
- Field lessons to Texas capital and other venues to see lawmaking making in action.



5

Will Science Get Sufficient Attention?

- **Students will graduate with deep knowledge of the physical world, scientific principles, and the ability to apply the scientific method.**
  - Core Knowledge science curriculum coupled with Pearson's Science Explorer Series
  - Lab science with a science specialist starting in Kindergarten
  - **8th Grade Science includes "Conceptual Physics" which is also used at the University level.**
  - Science taught everyday grades 3-8.
  - Field lessons to explore nature

6

How will students develop virtue?

Students will become members of CREW, a team of students, teachers, staff and parents who will work together to learn, model, and practice the school's core values:



7

Will you teach languages, fine arts, and physical education?

- Spanish will be taught in the lower grades; Latin will be taught in grades 6-9 using Wheelock's Latin.
- School will employ a bilingual instructor in each grade K-3.
- School signage will be in English and Spanish.
- Fine arts are an integral part of the curriculum and will be taught by specialists.
- Students will have regular physical education, study a health curriculum, and have healthy lunches.

8

What about after school and co-curricular activities?

- Parents will be able to drop their children off before school.
- School will partner with the Y initially for after school programs that will include art, physical activities, games, and character education.
- Beginning in grade 3, students and teachers will initiative after school clubs such as drama, lego-logo robotics, student government, and art.
- Middle school students may participate in competitive athletics such as soccer, basketball, volleyball, track and cross-country
- Students will regularly engage in community service projects such as work at the food bank and musical presentations to senior citizens.

9

What Are Your Plans for Safety and Security?

- State-of-the-art security system
- Single point of entry
- Background check system for all visitors
- Full time, on-site security guard
- Staff training and frequent drills on active assailant and code red procedures

10

Will You View Parents as Partners?

- We recognize that you are your child's most important teacher and value your participation in the life of the school.
- We encourage you to read, study with your child, and minimize distractions at home during student time.
- We know you will reinforce and model the CREW pillars of virtue and have productive interactions with teachers and staff.
- The school will communicate with you on a weekly basis through weekly student folders that you will need to sign and return.
- We encourage you to arrive on time and minimize absences.
- You can stay up to date through the school's website, newsletters, monthly coffees with the school leaders, and other means.
- You can participate in HCA's school supply and uniform program.

11

What Evidence Do You have of Success?

Chelsea --- put your bar graph of results from Florida here. I could not copy and paste it for some reason.

12

What Are My Next Steps?

- Fill out the card so that we will have your contact information.
- Note on the card if you would like to be placed on a waiting list.
- Look for communication from the school about our progress in securing a charter school application.
- In the September of 2020, we will know if the state has granted Heritage a charter and we will begin the application process in October 2020.

13

Your Questions

14



Article is the Leader News 1/16/2020

Character key at proposed charter school

January 16, 2020 by Betsy Denson — Leave a Comment



Heritage Classical Academy, a proposed charter school in the area recently held an informational session.

it's what I learned when I was younger," said pare[redacted]

Board member Kathryn van der Pol – the Leader of the Year in 2019 – said she was born with teacher blood. Long before she bought Liberty Hoepfl Garage with husband, Sybren, van der Pol taught Latin and history at St. Thomas Episcopal and later spent 17 years as a Latin and history teacher at St. John's School, where she thought the education students received was top-notch.

So when van der Pol was listening to a radio program about Hillsdale College's Barney Charter School Initiative a few years back, she was more than intrigued.

The idea of a school that would provide a rigorous, classical education in the liberal arts and sciences, along with instruction in the principles of moral character and civic virtue, was so inspiring to her that van der Pol traveled to visit some of the other charter schools around the country. Then she took a class that trained her to be a board member of such a school.

Through networking, she met Stuart D. Saunders, chairman of the board of SouthTrust Bank, who also felt a strong pull toward education with a grandmother, mother and sister all in the profession. When his grandmother died, Saunders' family gave a scholarship in her name to teachers for several years. But they also were looking for a way to have a bigger impact.

"We believe in education, (so we wondered) what else can we do," Saunders said.

For Saunders, who is the board chair of Heritage Classical Academy, the answer is a tuition-free, co-educational, public charter school that – if its charter application is approved by the Texas Education Agency – would open in the fall of 2021 with kindergarten and first graders. The school would then add a grade each year through eighth grade.

The school would be part of the Barney Charter School Initiative, using the classical education method with a traditional approach and an emphasis on reading, writing and critical thinking. There are 20 schools in the initiative so far.

At the Saturday session, Saunders talked about the poor accountability scores for many Houston ISD schools and said Heritage wanted to give area families another choice in education. Saunders said as a state charter, Heritage would be open to anyone who wanted to attend – space permitting – and would also be subject to the same accountability measures as public schools.

Critics of charter schools say they siphon money as well as gifted teachers and parent support from school districts – which may be forced to close their own schools in response.

the gathering that she grew up in Houston's Fifth Ward and that a school like Heritage would have been a great opportunity for her and students like her.

"We have data, we have results," Collins said, sharing test scores that showed Barney Charter School students excelling in reading compared to their public school peers, with more modest gains in math scores.

Collins said the goal for Heritage is to have all students reading by the start of their second semester in first grade. For math, the Singapore system of mathematics would be used.

Saunders said Heritage will get public funding if it is chartered. But in advance of that, the board is doing a friends-and-family seed capital campaign to make sure they can be up and running once the charter approval comes through.

Attendees responded with enthusiasm to the character-building part of the school's mission.

"In our culture there needs to be more civil discourse," van der Pol said. "(The curriculum) will help students become great critical thinkers (and) articulate what they believe in without name-calling and belittling others."

Filed Under: Education

Leave a Reply

Your email address will not be published. Required fields are marked *

Comment

Mission

Heritage Classical Academy provides a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom and character to a state of virtue and by preparing them as well-educated self-governing citizens and leaders for the next generation of America.

Vision

The goal of a young person's education should be to train the mind and heart to be prepared to make the best life possible for one's self and others. Our goal is to train a person to be both a thinker and a doer; to be a person whose senses are well-developed; to be a person who adjusts well to a changing world and can be innovative and creative, but knows that there are timeless principles worth preserving; to be a person who is self-governing, self-directed, and self-disciplined. We want to shape young people who are thoughtful, kind and empathetic, but decisive and pro-active. We want our students to be moral, courageous, faithful to one's principles and to be seekers of the good and the true. We believe that this person will be a wise, virtuous, confident, and productive American, well-positioned to lead a of a happy life and contribute to his or her community.

With an education from Heritage Classical Academy, our graduates will enter the world prepared and knowledgeable for whatever challenges life may hold for them. They can seek either a college education or career and technical training and excel in either path. Our graduates are such good learners and so well prepared, that they can be productive in the market, good citizens and neighbors, love liberty and the life of the mind. They will become lawyers who love geometry and plumbers who can quote Aristotle.

Core Virtues of the School

Moderation

Responsibility

Courage

Prudence

Citizenship

Justice

Wisdom

Definitions

Moderation

- Control your emotions. Practice self-control.

Courage

- Remain steadfast. Be willing to take action even if you are afraid. Practice grit and perseverance when the task is difficult.

Responsibility

- Accept your duties. Understand that all liberties carry responsibilities. Practice holding yourself accountable.

Prudence

- Think before you act. Exercise good judgment. Practice being deliberate.

Citizenship

- Learn how to engage in civil discourse. Practice getting along well with others.

Justice

- Uphold the rules. Be helpful and treat others with respect. Practice being fair.

Wisdom

- Seek to know the most important things. Practice finding the good, the true and the beautiful.

School Motto

"Sapientia et Virtus"

Wisdom and Moral Goodness
(translation)

Student Outcomes

Students at Heritage Academy will graduate with these abilities and attributes:
Sapientia: Knowledge to a State of Wisdom

- Ability to read with comprehension and fluency, write and speak effectively, and to develop a life-long habit of reading, inspired by the outstanding literature studied at Heritage;
- Fluency in the language and beauty of mathematics and the ability to use it in academics and life;
- Knowledge of the principles and concepts in science as a foundation for understanding and appreciating the physical world and as a preparation for a STEM career if desired;
- Knowledge of history and geography and a deep understanding of the founding principles of the American republic, leading to a desire for civic engagement;
- Knowledge of Latin, leading to fluency in other languages;
- Ability to analyze complex information, derive truth, and discourse about ideas in a civil manner;
- Appreciation for beauty and the arts and the ability to participate in visual and/or performing arts;
- A commitment to physical fitness and a healthy lifestyle;
- Ability to succeed in postsecondary and career and to lead a happy and fulfilling life.

Virtus: Character to a State of Virtue

- Deep understanding of enduring moral values;
- A commitment to excellence in every endeavor;
- A commitment to live with honesty and integrity;
- Respect for self and the dignity of every human being;
- Self-governance, self-awareness and positive self-esteem;
- Empathy for the conditions and needs of others and a desire to serve.

Education Philosophy

Heritage Academy's philosophy of education is derived from the classical education approach and TEA's Effective Schools framework (https://texasesf.org/framework/ (Add footnote that this is derived from the effective schools research of Larry Lezotte). We believe that students thrive in an environment where:

- Strong instructional leadership uses a continuous improvement approach to plan effectively;
- Outstanding, well-supported teachers hold high expectations for ALL students;

- Effective data-driven instruction with frequent progress monitoring and different instructional modalities, including the Socratic method, helps all students achieve mastery of the essential knowledge and skills;
- An orderly, safe environment and positive school culture promote learning;
- Sufficient time on task enables ALL students to learn the material;
- A high-quality curriculum grounded in the classical liberal arts promotes critical thinking, the ability to discourse in a civil manner, and a love of learning;
- Systematic character development and opportunities for service prepare scholars for the best life possible for one's self and others;
- Positive home/school relations and parent engagement are critical for student success.

Heritage Survey Results

August 1, 2019 prepared by Families Empowered

Methodology and Purpose

This survey was commissioned by Stuart Saunders on behalf of Heritage Classical Academy in April 2019 and conducted by Families Empowered. The survey was conducted of N=309[1] randomly-selected families[2] living in Houston in 163 select ZIP codes which had been targeted for a possible school location. All of these families had sought support from Families Empowered within the past 5 years, as part of its free services to parents who are seeking school options.

This survey (see Appendix) was developed in collaboration with Stuart Saunders, Kathryn van der Pol, Debra Schindler, and the Families Empowered leadership team. Some of the questions were based, in part, on previous parent surveys conducted; other questions were written specifically for this survey and tested on parents before the survey was launched. The questions we sought to answer included:

- Is there demand for more school options in these geographic areas and, if so, why?
- Is there demand specifically for a classical education model?
- Do parents understand what a classical education model means?
- When described, are they interested in learning more?
- What does their ideal school look and feel like?

This survey was conducted over the phone by one of four bi-lingual customer support specialists between June 3 -July 29, 2019 and supervised by Families Empowered's Operations Manager, Patricia Castillo. The survey was translated into Spanish by Families Empowered staff and majority of these surveys were conducted in Spanish. Our survey response rate was 42%[4], well above national phone survey response rates. These results were compiled and analyzed by Mina Kumar, Families Empowered's Acting Chief Program Officer and Director of Innovation.

Families Empowered is a nonprofit organization founded to support the escalating number of families searching for a great school for their child. The organization's vision is that, one day, all families will have access to schools that work, for them. Its core customers are the parents who are the most resource constrained. For these families, the stakes for choosing a quality school are higher for these kids than for their more affluent peers. Families Empowered is the only organization in Texas focused on helping

[1] Note not all respondents were asked every question by design (e.g. some questions were only asked if they had answered a specific way in a previous question) and in some cases they refused to answer specific questions; thus, not every question has 309 responses. The number of responses is indicated in each chart/table. This overall sample size for gives the survey a +/- 5.5% confidence interval on most answers at the 95% confidence level.
[2] Families Empowered has a database of 8,051 waitlisted applications (to a high performing charter school) from parents living in these ZIP codes since 2013
[3] 77018, 77040, 77031, 77041, 77047, 77053, 77055, 77064, 77071, 77080, 77584, 77085, 77091, 77092, 77477, 77489
[4] For completed calls (not including bad numbers, voicemails, dropped calls); this the ratio of completed calls with surveys over all calls where the survey was offered. In 2017, The Gallup Poll Social Series national surveys achieved a 7% response rate, on average.

parents navigate all their choices, and the largest one in the country. For ten years, Families Empowered has built service-based relationships with parents, conversation-by-conversation, call-by-call. Parents have told its staff that, other than friends and family, Families Empowered is the the source of information about schools that they trust and find helpful above all others.

Demographics of Sample

The majority of families answering the survey and willing to report on income had a below-average household income for Houston.[5]

Household Income

Under $25,000/year	104	35%
$25,000 - $50,000	123	41%
$50,000 - $75,000	16	5%
$75,000 - $100,000	1	0%
More than $100,000	0	0%
Prefer not to respond	55	18%
	299	

The majority of families answering the survey were Hispanic/Latino (87%), and the second largest proportion of families (6%) were African American.

Ethnicity

Hispanic or Latino	261	87%
White	1	0%
Black or African American	19	6%
Asian	1	0%
Other or mix	2	1%
Prefer not to respond	15	5%
	299	

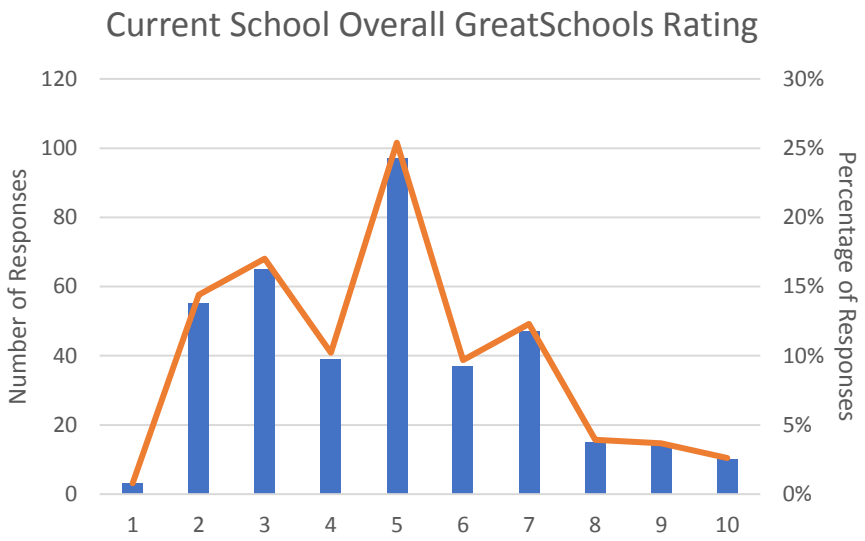
The majority of respondents (76%) told us that Spanish was their preferred language, and answered the Spanish version of the survey and conversed with our bi-lingual callers in Spanish.

[5] The Census ACS 1-year survey reports that the median household income for the Houston-Sugar Land-Baytown Texas metro area was $63,802 in 2017, the latest figures available. Houston median household income is $4,596 higher than the median Texas household income and $3,466 greater than the US median household income

Preferred language

Spanish	230	76%
English	49	16%
Bilingual English/Spanish	12	4%
Unknown	13	4%
	304	

The majority of families in the sample (67.8%) had children currently attending a school with a GreatSchools[6] overall rating of 5 or below (n=3826=; one parent can answer for multiple children's schools).



Key Findings

[6] Families Empowered does not rate or rank schools, but it does share accurate and actionable information about schools with parents, ratings being one such type of information. GreatSchools is a non-profit organization that works with state and local agencies to compile school performance information. "The GreatSchools Summary Rating appears at the top of a school's profile and provides an overall snapshot of school quality based on how well a school prepares all its students for postsecondary success… The Summary Rating calculation is based on five of the school's themed ratings (the Test Score Rating, Student or Academic Progress Rating, College Readiness Rating, Equity Rating and Advanced Courses Rating) and flags for discipline and attendance disparities at a school." (For more information see: https://www.greatschools.org/gk/ratings/)

School Options

There appears to be evidence within this respondent pool of either lack of awareness of school options or lack of supply of good options (or both). All our respondents had signed up for Families Empowered's free services and had been actively searching for schools at one point; we asked how many families were successful in changing schools and found that only 36% had. For context, in two previous surveys in 2018, we have seen between 20-26% of families had changed schools within 18 months. Please note that many respondents did not answer this question because they had just started their school search or could not remember when Families Empowered first contacted them.

Changed schools since FE first contacted you?

Yes	30	36%
No	54	64%
	84	

Of those respondents who had changed schools, we asked how many had changed due to a deliberate choice which could include applying for a school of choice or moving vs. just a normal transition to another zoned school, and found that the majority had made a deliberate choice (85%).

For those that did not successfully change schools since we first contacted them, we found that majority (69%) had applied to a school or schools of choice but had not been successful.

Finally, we asked respondents if, when looking ahead to the next application season, whether or not they felt they had good school options. We found that the majority (70%) felt like they had only few or no good options available.

Do you feel like you have good school options for your child?

1 - I feel like I have no good options	35	12%
2 - I have a few good options	174	58%
3 - I have some good options	48	16%
4 - I have multiple good options	33	11%
5 - I feel like there are lots of great options out there	10	3%
	300	

When we asked respondents to explain their answers, we got a range of responses including:

- *"To be [successful] it takes multiple applications and years of trying"*
- *"Lack of information"*
- *"I know there are some out there just haven't had the time to sit down and search."*
- *"Because there's nothing near my house and schools don't have transportation" [translated]*
- *"The school we go to has many problems regarding communication and discipline. My children are being bullied and the teachers are irresponsible."*
- *"Because when I applied, I was always on the waitlist" [translated]*

For context, Families Empowered has found that, among the families we work with who tend to face language and resource constraints, awareness of options is very low. For example, when we first reached out to a sample of families in another survey across all three our regions (Houston, San Antonio, and Austin), we asked how many schools they were aware of that were options for their child – only 18% of families could even name ONE additional school other than their current school or a school where they had already been waitlisted. In addition, we have found that families are not aware of basic strategies for being successful in pursuing options; for example, prior to the ease and convenience of Apply Houston[7], only about 6% of families applied to multiple schools.

What are parents looking for and how do they choose?

We asked parents which attributes were most important in a school for their child and found that strong academics, great teachers, and effective disciplinary policies were most important to them.

Of the below features what is the <u>most</u> important?

Strong academics	133	44%
Particular program or course offerings	9	3%
Great teachers and administrators	70	23%
Warm, nurturing environment	19	6%
Effective disciplinary policies ensuring the safety of my child	64	21%
After and before school care	5	2%
Other	3	1%
	303	

Parents who cared to elaborate or name other important features said:

- *"Small classes passionate teachers"*
- *"Responsible and dependent teachers and anti-bullying"*
- *"Parent interaction, location, structure of school"*

Although some parents expressed interest in a particular program (e.g. "basketball" or "college readiness"), this was not a focus for most parents. On other hand, when given the option, most parents said that both before- and after- school care options were important to them.

After or before care?

After School	79	34%
Before School	14	6%
Both	136	59%
	229	

[7] A common school application launched in 2017-2018 by Families Empowered; during this school year families can apply to 66 schools (9 distinct charter districts) with one application. In its first year, over 36,000 used the common application and the number of families applying to multiple schools went from 6% to 23%.

Families Empowered has repeatedly found transportation to be a major sticking point for many parents; although most parents would be willing to travel further to better their children's education, most admit that they are unable to do so.

Are you willing to commute further to send your child to a better school?

Yes	128	43%
No	4	1%
Willing, but unable, the school would need to provide transportation	168	56%
	300	

Finally, we asked parents what resources they rely on to determine if a school might be a good fit; the majority rely on recommendations from other parents, but many are also very concerned by test scores and disciplinary information. In our experience, many parents need help finding and navigating online resources that provide this kind of information – the display, quantity, and meaning of available information is challenging for many parents.

What information do you use when trying to determine if a school is good for your child? (multiple responses allowed)

Test scores	239	77%
Recommendations from other parents	268	87%
Programs the school offers	254	82%
Demographics about who attends the school	176	57%
Discipline or attendance information	269	87%
Conversations with Families Empowered	88	28%
Unsure	1	0%
Other	13	4%
	309	

We first wanted to know what parents associate with the term "classical education", if anything by asking them what comes to mind. In short, few parents surveyed had any idea what "classical education" referred to and 20.1% (n=303) answered some form of "I don't know".

Other common associations were with "strictness" and discipline:

- *"Classical will be more strict" [translated]*
- *"…for children that do not behave well" [translated]*

Or "basicness" and "normalness":

- *"It's like the most indispensable, [only] what is necessary" [translated]*
- *"…normal, non-advanced" [translated]*
- *"like, standard" [translated]*

Or "old""

- *"Classic will be more like the education I received… very poor" [translated]*
- *"Programs from before, without the latest changes" [translated]*
- *"I think they don't have much technology" [translated]*
- *"As in conservative principles and values" [translated]*

The minority had more positive associations:

- *"It for children are better students" [translated]*
- *"It is more advanced" [translated]*
- *"It is a classic education of good principles like the schools of the past" [translated]*
- *"I imagine it must be good, with good teachers" [translated]*
- *"It may be a more advanced school than YES or Harmony" [translated]*

For the most part, most parents found this term confusing, and/or not something they would likely find inclusive or may not want for their child. For example, one parent said, "English only" [translated] and another said, "It follows the public school curriculum" [translated], and another said "It's more focused on culture" [translated].

Second, we gave them a specific *definition, "*A classical education is a curriculum where students read entire books, memorize poetry, study great philosophical ideas, learn foundational math and science principles, study both ancient and American history, and develop a love for beauty and truth" and asked them to react and let us know if this type of school would be of interest. This time, parents' reactions were overwhelmingly positive or, at minimum, they expressed interest in learning more about it:

- *"How beautiful mainly because of the teachings of the USA because they have to about this.. this is their country" [translated]*
- *"I honestly love [the idea]. Growing up when I went to school, I was interested in poetry and literature... It's crazy that I didn't know what the classical education was but I very interested in that. That will probably allow my son to express himself"*
- *"Yes – because they are teaching him to be a good person" [translated]*
- *"Yes, that is great that is all the curriculum that I am looking for"*

- *"I would like it because now in schools they only teach you to take the exam and prepare for that exam and nothing else" [translated]*
- *"It's actually good because in college this is how it is taught"*
- *"If above all they teach him respect for other people" [translated]*

Many parents were attracted to the part specifically about reading books (although some had an opinion on what kind), as they saw it as the antidote to spending too much time on the computer or with technology:

- *"Yes, because most children do not want to read books, they just want a computer" [translated]*
- *"Reading dignifies a person" [translated]*
- *"I would love it for my [redacted] loves to read… and in these schools they give them tragic books and I speak with the teachers and ask them to give [redacted] non-depressing books" [translated]*
- *"If it is a good environment … for me, when the person reads, he becomes wiser." [translated]*
- *"I believe that if technology has replaced many things… before they had to memorize… now they do not have a phone or a tablet. Children now only use technology" [translated]*

Subject- and discipline- specific feedback

Latin

Next, we asked parents to tell us how much they would value the opportunity for their child to learn a Classical language such as Latin, starting in sixth grade on a scale of 1-5 with 1 being "highly" and 5 being "not at all" and the majority said they would highly value this opportunity.

How much do you value your child learning a Classical language?

1 - Highly Value	232	77%
2 -	20	7%
3 - Somewhat Value	25	8%
4 -	9	3%
5 - Not At All Value	14	5%
	300	

When asked why they would value their child learning Latin, many said they believed that learning any other language is valuable, that Latin it was the basis for their own culture and language, that knowing multiple languages translated to increased opportunity. For those that said they did not value it much or at all, the majority said they wanted their child to learn Spanish or another current language like French or Chinese, or something that was more useful for a job.

Finally, asked parents if they would change their answer if we told them that studying Latin was proven to help students with vocabulary, spelling and on standardized tests. Only 20% (n=261) said they would change their answer but, as shown before, most parents already placed a positive value on Latin without this information.

Basic skills and phonics, moral virtue, and the classics

We asked parents if they were concerned with their child's progress on basic skills like reading at their current school and the majority – **57%** (n=301) – stated that they were. Next we asked if they agreed with the statement, "I am open to a school that teaches reading through phonics and grammar instruction, a proven method of language and reading learning" and found that virtually everyone was open to this method.

Open to phonics?

Agree	298	99%
Disagree	3	1%
	301	

We asked parents how much they would value moral virtue and respect for ones' self and others are part of the curriculum at a school, on a scale of 1-5 with 1 being "highly" and 5 being "not at all," and the majority said they would highly value this opportunity.

Importance of teaching moral virtue?

1 - Highly Value	291	97%
2 -	4	1%
3 - Somewhat Value	2	1%
4 -	0	0%
5 - Not At All Value	1	0%
	298	

We asked parents how much they would value their child being taught the classics such as Aesop's Fables, Jungle Book, Moby Dick, and The works of William Shakespeare and Charles Dickens, along with great philosophical ideas on a scale of 1-5 with 1 being "highly" and 5 being "not at all" and the majority said they would highly value this opportunity.

Importance of teaching classics?

1 - Highly Value	219	73%
2 -	11	4%
3 - Somewhat Value	52	17%
4 -	4	1%
5 - Not At All Value	10	3%
	296	

Priorities

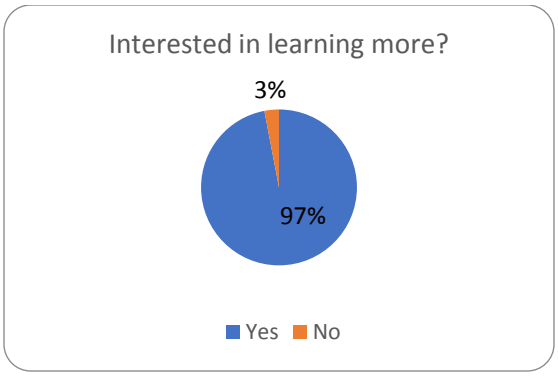
Our final question for parents was to ask them to rank which subjects or activities they are <u>most</u> interested in having their child exposed to at school. Most important were science, technology and

math, reading and writing, and character and moral virtue. Least important were sports and music and art.

	1	2	3	4	5	6	7
Reading and Writing	87	81	49	32	18	19	13
History	6	28	48	57	73	59	31
Literature and Foreign/Classical Languages	22	35	44	57	51	45	45
Science, Technology, Math	102	83	48	34	14	13	10
Music and Art	13	17	31	39	61	68	69
Sports	8	22	30	37	37	57	108
Character and Moral Virtue	63	35	51	45	46	40	24
	301	301	301	301	300	301	300

	Reading and Writing	History	Literature and Foreign or Classical Languages	Science, Technology, Math	Music and Art	Sports	Character and Moral Virtue
1 - Most	29%	2%	7%	34%	4%	3%	21%
2	27%	9%	12%	28%	6%	7%	12%
3	16%	16%	15%	16%	10%	10%	17%
4	11%	19%	19%	11%	13%	12%	15%
5	6%	24%	17%	5%	20%	12%	15%
6	6%	20%	15%	4%	23%	19%	13%
7 - Least	4%	10%	15%	3%	23%	36%	8%

Finally, we asked parents if they would be interested in learning about opportunities to apply to a tuition-free charter school that provides a classical education if it were to open near them in the next few years – almost everyone (n=299) said they would be interested in learning more.



Conclusions

These survey findings are from a random sample of parents in the target ZIP codes who have expressed interest to Families Empowered in exploring school options. Based on these findings, we believe there is evidence that there is high need for more school options (e.g. parents expressed to us that they don't feel they have many good options, as well as frustration with pursuing available options). We also believe there is evidence of demand for a high-quality tuition-free classical education model school like Heritage.

APPENDIX: Heritage Survey Script – English

Enter the call

"Hi, this is [Caller Name] with Families Empowered. Am I speaking with [Parent Name]? Excellent, I hope you're having a great day."

"As you know, Families Empowered is a non-profit parent service organization that provides free information to parents who are searching for great schools. We've reached out to you in the past because your child was / children were previously waitlisted ("placed on a waitlist") at [Application District]. (Repeat for multiple children)

"Is that correct?"

"We are in the process of updating our records, as well as reaching out to parents to better understand their family's needs."

Update Information

"May I update some contact information with you?"

- Is [read phone number] still the best phone number for you?
- Is [read email address] a good email address for you? / What is a good email address for you?
- And you live at [Address] - is that correct?

A1) "Since we last spoke, did your child change schools?" (Repeat for multiple children)

- YES
- NO

A1a) If YES:

a) Where is your child enrolled currently? Enter campus name (not district name) from Salesforce list. We should be able to look at the GreatSchools rating of this campus
b) Did you have to apply to attend this school, did you get accepted from a waitlist, did you move specifically to attend the school, or was it your normal neighborhood school? (Something you were automatically zoned for?)
    - YES, it was a deliberate choice
    - NO, I didn't have to take any action, it was my zoned school

A1b) If NO:

a) What is the primary reason why you did NOT enroll in another school based upon the following options:
    - My current school has made positive changes; we are willing to give it another shot.
    - We are content to sit on a waitlist for our first choice for as long as it takes.
    - We didn't get in anywhere we applied
    - We explored other options, but didn't find anything better than our current school.
    - We explored other options, and instead have decided to try making positive changes to our current school.
    - Other

Provide Service

"Do you have any other children, besides [Application Students] that you might be interested in exploring school options for – now or in the future?" (add additional students connected to parent record)

"You can call us or visit our website – FamiliesEmpowered.org – if you need help finding a school. Once you are ready to apply, please go to ApplyHouston.org, where you will have the opportunity to apply to over 60 schools with one application. Do you have any questions I can help you with right now?" (answer any specific questions they may have about applications/schools)

Conduct Survey

"Great. Thank you! While I have you on the phone, I have a few more questions that will help one of our school partners understand how they can better serve parents' needs in the community. This school partner is considering opening a new school and would like to get a better understanding of community needs and preferences. We know that there are still thousands of parents in Houston searching for schools, and we want make sure that any new schools that open are a right fit." (allow parents to opt out of additional questions)

B1) When looking ahead to the next application season, do you feel like you have good school options for your child – on a scale of 1-5, with 1 being "I feel like I have no good options" to 5 being "I feel like there are lots of great options out there"? (Scale 1-5, with all scale questions be sure you're verifying by repeating their answer e.g. if they say "1" say, "so you feel you have no good options?") Can you please explain your answer? (Record in B1a)

B2) When thinking about schools for your child, what kinds of things are most important to you?" **Can choose yes/no for each**

- Strong academics
- A particular program or course offerings (*Which one or ones are you looking for?* Record in **B2_Program**)
- Great teachers and administrators
- A warm, nurturing environment
- Effective disciplinary policies ensuring the safety of my child
- After and before school care (*Which type are you looking for?* Record in **B2_After and Before care**)
- Other (*Such as?* Record in **B2_Other**)

Of the above reasons, which is the *most important*? (Record in **B2_Primary**)

B3): Are you willing to *commute further* to send your child to a better school?

- Yes
- No
- Willing, but unable, the school would need to provide transportation

B4): What information do you use when trying to determine if a school is good for your child? *(multiple responses allowed)*

- Test scores
- Recommendations from other parents
- Programs the school offers
- Demographics about who attends the school
- Discipline or attendance information
- Conversations with Families Empowered
- Unsure
- Other (*Such as?*)

B5) What comes to mind when someone says “Classical education” if anything (open ended)?

B6) A classical education is a curriculum where students read entire books, memorize poetry, study great philosophical ideas, learn foundational math and science principles, study both ancient and American history, and develop a love for beauty and truth. What is your reaction to this? Do you think this is an environment that may be good for your child? Why or why not? **(**Record in **B6_Why**)

B7) On a scale of 1-5 with 1 being “highly” and 5 being “not at all” how much would you value having your child have the opportunity to learn a Classical language such as Latin, starting in sixth grade?

B8) What if I told you that studying Latin was proven to help students with vocabulary, spelling and on standardized tests? Would that change your answer?

If YES, then: On a scale of 1-5 with 1 being “highly” and 5 being “not at all” how much would you value having your child have the opportunity to learn a Classical language such as Latin?

B9) Do you agree or disagree with the following statements:

- I am concerned with my child’s progress on basic skills like reading at his/her current school
- I am open to a school that teaches reading through phonics and grammar instruction, a proven method of language and reading learning

B10) On a scale of 1-5 with 1 being “highly” and 5 being “not at all” how important is it to you that moral virtue and respect for ones’ self and others are part of the curriculum at a school?

B11) On a scale of 1-5 with 1 being “highly” and 5 being “not at all” how important is it to you that a school teaches the classics SUCH AS, Aesop’s Fables, Jungle Book, Moby Dick, and The works of William Shakespeare and Charles Dickens, along with great philosophical ideas?

B12) Which subjects or activities are you most interested in your child having exposure to at school? (Forced rank 1-7, 1 = most important, 7 = least important, can we randomize the order so each time it is asked it is asked in a different order to prevent bias?)

- Reading and Writing
- History
- Literature and Foreign/Classical Languages
- Science, Technology, Math

- Music and Art
- Sports
- Character and Moral Virtue

If a parent asks, Character and Moral Virtue = Being a good person, not just a good student.

B13) In order for us and for school partners to better understand our families, we would like to know some basic demographic information about the families in our database. Your responses will be kept strictly confidential and are for research purposes only. We will never share your individual response. Can you please share which demographic group your child belongs to?

- Hispanic or Latino
- White
- Black or African American
- Asian
- Other or mix
- Prefer not to respond

B14) Can you please share your annual household income form this past year?

- Under $25,000/year
- $25,000 - $50,000
- $50,000 - $75,000
- $75,000 - $100,000
- More than $100,000
- Prefer not to respond

B15) If a tuition-free charter school that provides a classical education were to open near you in the next few years, would you be interested in hearing directly from them about opportunities to apply?

- YES
- NO

B16) If YES, what questions would you want answered about the school?

Heritage Survey Script – Spanish

Entra la llamada

"Hola, mi nombre es [Caller Name], le estoy hablando de Families Empowered. Hablo con [Parent Name]? Excelente, espero que esté teniendo un buen dia."

“Como Usted sabe, Families Empowered es una organización sin fines de lucro que provee información gratuita a los padres que están en busca de una mejor escuela. Nos hemos contactado con Usted en el pasado por que su hijo/a fue puesto previamente en la lista de espera en [Application District]. (Repeat for multiple children)

Es esto correcto?

“Estamos en el proceso de actualizar nuestros archivos, y contactando padres para entender mejor las necesidades de sus familias.”

Información Actualizada

“ Podría verificar algunos datos con Usted?”

- [Read phone number] sigue siendo el mejor numero de telefono para comunicarse con Usted?
- Es [read email address] un buen correo electrónico? / Cual seria un buen correo electrónico para Usted?
- Usted vive en [address], es esto correcto?

A1) “ Desde la última vez que hablamos, ha cambiado su hijo/a de escuela?’ (Repeat for multiple children)

- SI
- NO

A1a) Si si:

a) Dónde está su hijo/a inscrito actualmente? Enter campus name (not district name) from Salesforce list. We should be able to look at the GreatSchools rating of this campus.
b) Tuvo que aplicar para atender a esta escuela, fue aceptado de la lista de espera, se cambio de domicilio específicamente para poder ir a esa escuela, o es la escuela que corresponde a su vecindario? (Fue asignado automáticamente por la zona donde vive?)
   - SI, fue una decisión deliberada.
   - NO, no tuve que tomar ninguna acción, es la escuela de mi zona.

A1b) If NO:

a) Cual es la razón principal por la que no se inscribió en otra escuela basado en las siguientes opciones:
   - Mi escuela actual ha hecho cambios positivos; estamos dispuestos a darle otra oportunidad.
   - Estamos bien esperando cupo en la escuela que elegimos por el tiempo que sea necesario.

- No fuimos aceptados en ninguna de las escuelas a las que aplicamos.
- Exploramos otras opciones, pero no encontramos nada mejor que la escuela actual.
- Exploramos otras opciones, y decidimos hacer cambios positivos en la escuela actual.
- Otro

Proporcionar Servicio

"Tiene mas hijos/aparte de [Application Students] para los que quisiera explorar más opciones de escuelas – ahora o en el futuro?" (add additional students connected to parent record)

"Usted nos puede llamar o visitar nuestra página de internet – FamiliesEmpowered.org – si necesita ayuda para encontrar alguna escuela. Una vez que esté listo para aplicar, vaya por favor a Apply Houston.org, donde tendrá la oportunidad de aplicar a más de 60 escuelas con tan solo una aplicación. Tiene preguntas con las que le pueda ayudar? (answer any specific questions they may have about applications/schools)

Hacer Encuesta

Muy bien. Gracias! Mientras está en el teléfono, tengo algunas preguntas que ayudarán a una de nuestras escuelas asociadas a entender cómo pueden servirle mejor las necesidades de los padres en la comunidad. Esta escuela está considerando abrir una nueva escuela y quiere entender mejor las necesidades y preferencias de la comunidad. Sabemos que todavía hay miles de padres en Houston buscando escuelas, y queremos asegurarnos que cualquier escuela que esté abriendo sea adecuada. (allow parents to opt out of additional questions)

B1) Viendo hacia la próxima temporada de aplicaciones, siente que tiene buenas opciones para su hijo/a – en una escala del 1-5, con 1 siendo "siento que no tengo buenas opciones" y 5 siendo "siento que hay muchas buenas opciones"? (Scale 1-5, with all scale questions be sure you're verifying by repeating their answer e.g. if they say "1" say, "so you feel you have no good options?") Podría explicar su respuesta? (Record in B1a)

B2) Cuando piensa en escuelas para su hijo/a, que clase de cosas son las más importantes para Usted?" **Escoja si/no para cada una**

- Un Buen Programa Academico
- Programas o cursos en particular (cual o cuales está buscando)? (Record in B2_Program)
- Excelentes maestros y administradores
- Un ambiente agradable

- Pólizas disciplinarias efectivas que aseguren la seguridad de mi hijo/a
- Cuidado antes y después de escuela (Que tipo esta buscando)? (Record in B2_After and Before care)
- Otro (Como que? Record in B2_Other)

De las razones anteriores, cual es la más importante? (Record in B2_Primary)

B3) Está dispuesto a manejar más lejos para que su hijo/a atienda una escuela mejor?

- SI
- No
- Dispuesto, pero no puedo, la escuela tendría que proveer transporte.

B4) Qué información usa para determinar si una escuela es buena para su hijo/a? (multiple responses allowed)

- Resultados de las Exámenes
- Recomendaciones de otros padres
- Los programas que la escuela ofrece
- Estadistica de Poblacion que atiende las escuelas.
- Información de disciplina y asistencia
- Conversaciones con Families Empowered
- No estoy seguro/a
- Otro (Como que?)

B5) ¿Una "educación clásica" significa algo para Usted? Que le viene a su mente cuando alguien dice Educación Clásica? Si algo (open ended)?

B6) La educación clásica es un plan de estudios donde los estudiantes leen libros enteros, memorizan poesía, estudian grandes ideas filosóficas, aprenden principios básicos de matemáticas y ciencias, estudian historia antigua y estadounidense, y desarrollan un amor por la belleza y la verdad. ¿Cuál es su reacción a esto? ¿Cree que este es un ambiente que puede ser bueno para su hijo? ¿Por qué o por qué no? (Record in B6-Why)

B7) En una escala del 1-5 con 1 siendo “mucho” y 5 siendo “para nada”, qué valor le daría a la oportunidad de su hijo/a de aprender un idioma clásico como el Latín a partir del sexto grado? Por que o por que no? (Reccord in B7_Why)

B8) Qué pasaría si le digo que ha sido probado que estudiar latín ayuda a los estudiantes con vocabulario, ortografía, y en las pruebas estandarizadas? ¿Cambiaría eso su respuesta?

Si es así, entonces: En una escala de 1 - 5, siendo 1 "altamente" y 5 siendo "nada" ¿cuánto valor tendria que su hijo/a tenga la oportunidad de aprender un idioma clasico como el latin?

B9) Está de acuerdo o desacuerdo con las siguientes declaraciones:

- Estoy preocupado/a por el progreso de mi hijo/a en habilidades básicas como leer en su escuela actual
- Estoy abierta a escuelas que enseñan a leer con Instrucción de fonética y gramática., un método probado para aprender lenguaje y lectura.

B10) En una escala de 1-5 con 1 siendo “mucho” y 5 siendo “para nada” que tan importante es para Usted que la virtud moral, el respeto por uno mismo y los demás sean parte de el curriculum de la escuela?

B11) En una escala de 1-5 con 1 siendo “mucho” y 5 siendo “para nada” que tan importante es para Usted que la escuela enseñe los clásicos como Aesop’s Fables, Jungle Book, Moby Dick, y The Works de William Shakespeare y Charles Dickens, junto con magníficas ideas filosóficas?

B12) Qué materias o actividades está Usted más interesado que su hijo sea expuesto en la escuela? (forced rank 1-7, 1 = most important, 7 = least important, can we randomize the order so each time it is asked, it is asked in a different order to prevent bias?)

- Lectura y Escritura
- Historia
- Literatura y Idioma Clasico/Extrnajero
- Ciencias, Tecnologia, y Matemáticas
- Bellas Artes y Música
- Deportes
- Personalidad y Virtud Moral

Si un padre pregunta, Personalidad y Virtud Moral = Ser una buena persona, no solo un buen estudiante.

B13) Para que nosotros y nuestras escuelas puedan entender mejor a nuestras familias, nos gustaría saber información demográfica básica acerca de las familias en nuestro sistema de base. Sus respuestas se mantendrán estrictamente confidencial y son solo para propósito investigative. Nunca compartiremos sus respuestas. Nos puede compartir a qué grupo demográfico pertenece su hijo/a?

- Hispano o Latino
- Blanco

- Negro o Afro-Americano
- Asiatico
- Otro o Mixto
- Prefiere no contester

B14) Nos puede decir su annual household income del ultimo ano?

- Menos de $25,000/al ano
- $25,000 - $50,000
- $50,000 - $75,000
- $75,000 - $100,000
- Mas de $100,000
- Prefiere no contester

B15) SI una escuela charter gratis, que provee educación clásica y tradicional, fuese a abrir cerca de su casa en los próximos años, estaría Usted interesado en escuchar directamente de ellos acerca de oportunidades para aplicar?

- Si
- No

B16) Si es así, que preguntas le gustaría fueran respondidas acerca de la escuela?

Heritage Classical Academy

- Flyers for Dec 3, 2019 Community Meeting –

Saturday

Acres Homes Community Center
Harvest Time Church of God & Christ- spoke to Margie
Oak Forest Public Library
Acres Homes Public Library- Shepard branch
Pro Nails Salon on Antoine
J&V Nails Salon on Antoine
Chic FilA @ 610 Loop North
The Grind House coffee house
Slow Pokes Coffee house

Sunday
Candlelight Church of Christ on Watonga - spoke to Neil, chairman of the Board
Living Word Fellowship Church on T.C. Jester - spoke to Laurenzo
Mt. Olive Baptist Church on T. C. Jester - spoke to Donna Dixon and Kay King
Gethsemane Lutheran Church, spoke to Pastor McNamara
New Day Church on Watonga, spoke to Emily who heads the day care program and is active in church and Pastor James
Shady Acre Independent Baptist Church, spoke to Yolanda

Sunday afternoon
Church of Christ on N. Shepherd, spoke to John who preached today
Jesu Christo El El Senor on N. Shepherd, spoke to Gustavo
LA Fitness
LT Nails Salon, spoke to Jenny
Emergency Urgent care center on N. Shepherd
Miller's Hamburgers

Marketing Report for December 3rd & January 11th Community Information Meeting

Heritage Classical Academy hosted its first community information meeting on Tuesday, December 3, 2019. There were **46 total attendees.**

Heritage Classical Academy hosted its second community information meeting on Saturday, January 11, 2020. There were **57 total attendees** that included an estimated: 70% Caucasian, 15% Hispanic, 10% African-American, 5% Other. Close to 20 different zip codes were represented at the meeting: 53% lived within 10 miles of the meeting space, 37% within 15 miles, and 10% within 20 miles.

Public awareness efforts leading up to the meeting included the following:

I. Marketing Collateral

a. Created and mailed meeting notice postcards to 948 homes in targeted zip codes for January meeting
b. Created and printed informational brochure outlining school mission/vision/outcomes
c. Launched school website and email address
d. Invite sent via email to board distribution list
e. Hung 3,000 door hangars on homes in 77018, 77088, 77091 for the December 3rd meeting

II. Advertising

a. Ran public meeting notice in Houston Chronicle print and online

III. Digital Media

a. Launched digital media campaign to spread awareness, including announcements on:
    i. Facebook
    ii. Instagram
    iii. Nextdoor
    iv. Online Community Calendars

IV. Partnered with the following entities to post flyers in their locations:

Public Community locations

a. YMCA
b. Acres Homes Multipurpose Center

c. Oak Forest Public Library
d. Shepard-Acres Homes Neighborhood Library

Daycares

e. Next Steps Daycare
f. New Day Daycare

Businesses

g. Slowpokes Coffee Shop
h. Liberty Hoepfl Garage
i. La Lupita Restaurant
j. Washateria
k. 24+ Emergency Room
l. Family Bingo Center
m. La Guerrero Meat Market
n. LA Fitness
o. LT Nails Salon
p. Emergency Urgent care center on N. Shepherd
q. Miller's Hamburgers
r. The Grind House coffee house
s. Pro Nails Salon on Antoine
t. J&V Nails Salon on Antoine
u. Chic FilA @ 610 Loop North

Churches

a. St. Monica Catholic Church
b. Greater Zion Missionary Baptist Church
c. Mt. Calm Missionary Baptist Church
d. New Life Tabernacle Church
e. Mt. Olive Baptist Church
f. Candlelight Church of Christ
g. St. Stephen's United Methodist Church
h. Iglesia Emmanuel
i. Oak Forest Baptist Church
j. Grace Church
k. Impact Church of Christ
l. Harvest Time Church of God & Christ
m. Church of Christ on N. Shepherd
n. Jesu Christo El El Senor on N. Shepherd

The following efforts were made during the December 3rd and January 11, 2020 community meeting:

I. Meeting Collateral

a. Informational brochures, meeting agendas, and school t-shirts were distributed to all attendees
b. Posters were created and posted around the room to include the schools mission statement, vision statement, territory map, and contact information.

II. Meeting Set Up

a. Snacks and cookies were served in December. A light breakfast and beverages were served to attendees in January.

b. A children's area with games, coloring books and balloons was set up and a caregiver provided.
c. A Spanish translator was on site and available for any necessary translation
d. Board members presented a power point and ended with Q & A from the audience

Marketing Report for January 11th Community Information Meeting

Heritage Classical Academy hosted its second community information meeting on Saturday, January 11, 2020. There were **57 total attendees**, to include: 70% Caucasian, 15% Hispanic, 10% African-American, 5% Other. Close to 20 different zip codes were represented at the meeting: 53% lived within 10 miles of the meeting space, 37% within 15 miles, and 10% within 20 miles.

Public awareness efforts leading up to the meeting included the following:

I. Marketing Collateral

a. Created and mailed meeting notice postcards to 948 homes in targeted zip codes
b. Created and printed informational brochure outlining school mission/vision/outcomes
c. Launched school website and email address
d. Invite sent via email to board distribution list

II. Advertising

a. Ran public meeting notice in Houston Chronicle print and online

III. Digital Media

a. Launched digital media campaign to spread awareness, including announcements on:
    i. Facebook
    ii. Instagram
    iii. Nextdoor
    iv. Online Community Calendars

IV. Partnered with the following entities to post flyers in their locations:

a. YMCA
b. Acres Homes Multipurpose Center
c. Oak Forest Public Library
d. Shepard-Acres Homes Neighborhood Library
e. Next Steps Daycare
f. Slowpokes
g. St. Monica Catholic Church
h. Greater Zion Missionary Baptist Church
i. Mt. Calm Missionary Baptist Church
j. New Life Tabernacle Church
k. Mt. Olive Baptist Church
l. Candlelight Church of Christ
m. St. Stephen's United Methodist Church

n. Iglesia Emmanuel
o. Oak Forest Baptist Church
p. Grace Church
q. Impact Church of Christ
r. Liberty Hoepfl Garage
s. La Lupita Restaurant
t. Washateria
u. 24+ Emergency Room
v. Family Bingo Center
w. La Guerrero Meat Market

The following efforts were made during the January 11, 2020 community meeting:

I. Meeting Collateral

a. Informational brochures, meeting agendas, and school t-shirts were distributed to all attendees
b. Posters were created and posted around the room to include the schools mission statement, vision statement, territory map, and contact information.

II. Meeting Set Up

a. A light breakfast and beverages were served to attendees
b. A children's area with games, coloring books and balloons was set up and a caregiver provided.
c. A Spanish translator was on site and available for any necessary translation
d. Board members presented a power point and ended with q&a from the audience

St. Monica Catholic Church
Father Lauro Bejo
8421 W Montgomery Rd, Houston, TX 77088
281-447-5837
www.stmonicahouston.com

Greater Zion Missionary Baptist Church
Pastor Dayle Perry/ Deacon Ester
1620 Dolly Wright St, Houston, TX 77088
281-447-2711 / 832-715-8676
gzmbc.org

Mt. Calm Missionary Baptist Church
2711 De Soto St, Houston, TX 77091
713-681-8092

New Life Tabernacle Church
Deacon Winster/ Pastor Carl Davis
3021 De Soto St, Houston, TX 77091
713-263-9700
newlifetabchurch.org

Mt. Olive Baptist Church
Pastor Kelton Henderson
3239 Areba St, Houston, TX 77091
832-460-5206
www.mountlife.org

Candlelight Church of Christ
4215 Watonga Blvd, Houston, TX 77092
713-681-9365
candlelightchurchofchrist.org

St. Stephen's United Methodist Church
Rev. Nathan Lonsdale Bledsoe, Senior Pastor
2003 W 43rd St, Houston, TX 77018
713-686-8241
stshtx.org

Iglesia Emmanuel
Pastors Jose Luis & Orbelicia
1845 W 43rd St, Houston, TX 77018
713-683-0744 / 281-599-0023
emanuelayp.org

Oak Forest Baptist Church
Dr. Richard Walters, Lead Pastor
1700 W 43rd St., Houston, TX 77018
713-682-4942
oakforestbaptistnhca.org

Grace Church Garden Oaks
Deacon John
3754 N. Shepherd Dr., Houston, TX 77018
281-441-1111
Grace.one

Impact Church of Christ
Paul Woodward, Elder
1704 Weber St., Houston, TX 77007
713-864-5667
impacthoustonchurch.org

Tele-Town Hall, January 11, 2021, 6:00 to 6:30 p.m.
SUMMARY

Organizer:	Chris Beavers, Beavers Media
Panelists:	Stuart Saunders, Board President; Kathryn van der Pol, Board Vice President
Structure:	10-minute presentation repeated three times over the 30 minutes Opportunity for listeners to call in and ask questions.
Reach:	A total of 7,919 outbound calls were placed. 2,887 (36.5%) of the outbound calls were answered by a person. The number that attended from the outbound calls was 1,905 (65.9%).

Total number of attendees:	**1,905**
# of Households stayed on 1 minute or longer:	**1,122 (53%)**
# of Households stayed on 5 minutes or longer:	**229 (12%)**
# of Households stayed on 10 minutes or longer	**97 (.05%)**

Given that COVID is at extremely high levels in Houston, HCA elected to try a new format for its final outreach meeting prior to GEN 26 application submission – a Tele-Town Hall meeting. On January 11, 2021 HCA conducted a tele-town hall meeting from 6:00 – 6:30 p.m. Because listeners were coming and going at all times, HCA had a 10-minute presentation that repeated three times over the course of the meeting.

To promote our meeting, HCA telephoned all residents in our selected zip codes between the ages of 18 – 50 – 7,919 households -- inviting them to participate in the Tele-Town hall.

Participation levels: According to the Tele-Town hall operator, any listener that remains on a town hall call for 1 minute or longer is considered significant. Heritage Classical Academy had 1,122 households that listened for 1 minute or longer. We had 229 households that listened for 5 minutes or longer, meaning that 229 listeners heard at least half of our entire presentation. There were 97 households that stayed on the call for 10 minutes or more, meaning that 97 individuals heard our entire message.

Types of Questions Asked: Participants asked questions about whether there was a tuition charge; where the school might be located; what grades would it start with and then have ultimately; what were the curriculum offerings and programs; what is the class size.

The HCA website had 32 unique visitors in the 24 hours following the Tele-Town hall. We also received 4 sign-ups on the website - 1 for enrollment and 3 for 'stay in touch on news/info.'

Heritage Classical Academy (HCA)
Community Outreach Meeting Agenda
White Oak Center, December 3rd, 6:00 p.m.

Heritage Classical Academy provides a focused classical education to a diverse community of K-8 scholars by developing their knowledge to a state of wisdom (*sapientia*) and character to a state of virtue (*virtus)* and by preparing them to become well-educated self-governing citizens and leaders for the next generation of America.

1. Introduction
   - Brief introductions of Board Members
   - Depending on size of crowd, brief introductions of interested families
   - Essential elements of a charter school
   - Two Board members speak to why they are proposing HCA in northwest Houston

2. Power Point Presentation that covers the following elements:
   A. Core Academic Program
      1) Summary of Heritage Academy
      2) Program to ensure success in reading, writing, and speaking
      3) Mathematics curriculum and instruction
      4) Study of history and geography
      5) Science program
   B. Character education
   C. Language, fine arts, and physical education offerings
   D. Before, after school and co-curricular activities
   E. Plans for safety and security
   F. Parents as partners
   G. Evidence of success
   H. Next Sseps

3. Community Input/Questions
   A. What questions do you have about the academic program we are planning to offer?
   B. Are there other thing you would like for your child to learn that we have not covered?
   C. Are there other values that you think the school should be reinforcing than the ones in our CREW model?

D. What are we missing? What else is important to you as you select the best school for your child?
E. Do you like the idea of your child wearing a school uniform?
F. How important is it to you to have transportation to and from the school?
G. What do you like about the current school your child is attending?
H. What is the most important factor to you in choosing a school for your child?
I. How can we become more a part of your community? Whom should we reach out to? What events should we be attending?

AMY PECK
Houston City Council Member, District A

December 14, 2020

Commissioner Mike Morath
Texas Education Agency
The Texas Education Agency
Generation Twenty-Four
1701 N. Congress Avenue
Austin, TX 78701

Dear Commissioner Mike Morath:

I would like to express my support for the authorization of the Heritage Classical Academy by the Texas Education Agency. Heritage Classical Academy is seeking to provide an outstanding education with an equal emphasis on character education for our underserved student populations in Northwest Houston. I believe that the board's demonstrated leadership and commitment along with the embodiment of continuous improvement and quality tools will lead to a great public choice options for families.

As the City Council Member for District A, I can only speak for my district and not the surrounding areas, but I believe it would be a good fit in District A and think my constituents would benefit from Heritage Classical Academy. I look forward to collaborating with Heritage Classical Academy's board and team as they launch this quality, classical education charter school in Houston.

Thank you for your consideration.

Sincerely,

Amy Peck

Amy Peck
Houston City Council Member, District A

Telephone (832) 393-3010 • City Hall Annex • 900 Bagby, 1st Floor • Houston, Texas 77002
districta@houstontx.gov

Impact Houston Church of Christ

1704 Weber St.
Houston, TX 77007

713-864-5667
www.impacthouston.org

January 11, 2021

Commissioner Mike Morath
Texas Education Agency
The Texas Education Agency
Generation Twenty-Four
1701 N. Congress Avenue
Austin, TX 78701

Dear Commissioner Mike Morath:

Houston Impact Church of Christ is eager to support the authorization of Heritage Classical Academy by the Texas Education Agency. Heritage Classical Academy seeks to provide an outstanding academic education including character development for our underserved student populations in Northwest Houston. We believe that the board's demonstrated leadership and commitment to their mission and to our Houston community will lead to a great public school choice option for families.

Impact Houston Church of Christ has been working to help those in poverty for the past 35 years. We provide encouraging life mentors to many of our children in our congregation. Over the years, our church has been strongly dedicated to education in other important ways. We founded two non-profits in the Houston area that operate independently of our church and are dedicated to education.

One is the Youth Development Center which provides literacy tutoring to public school students. The other is Small Steps, which is a highly successful pre-K program that provides high quality childcare to parents in an underserved area of Houston.

We believe that HCA will provide a great opportunity for the children in this community to advance and excel to become well-educated and caring responsible adults.

We look forward to collaborating with Heritage Classical Academy board to launch this quality, classical education charter school in Houston.

Sincerely,

Paul Woodward
Houston Impact Church of Christ
Elder

NNMD
NEAR NORTHWEST
MANAGEMENT DISTRICT

December 14, 2020

Commissioner Mike Morath
Texas Education Agency
1701 N. Congress Ave.
Austin, TX. 78701

Re: Heritage Classical Academy – Charter Application

Dear Commissioner Morath,

As President of the Near Northwest Management District, we welcome the addition of Heritage Classical Academy into Northwest Houston. As a Special Purpose District, we focus our efforts on Safety, Economic Redevelopment for existing businesses and new businesses throughout our community! Education plays a significant role in improving the quality of our businesses and success of our community. We strongly support Heritage Classical Academy, a proposed Kindergarten through 8th grade charter school focused on classical education and civic virtue. Education is not a one-size-fits-all proposition. Every Houston family should be empowered with great choices: project-based learning, Montessori teaching, classical education, just to name a few. I am excited that Heritage Classical Academy seeks to offer a rigorous and proven phonics approach in early grades and to build a solid foundation for reading and future academic success. Nothing can change the trajectory of a child more than a strong ability to read.

I know a classical charter school in northwest Houston would be a welcome addition to our community and a great education option for families. I am eager to see more Houston families gain access to another high-quality school choice option. Thank you for your consideration of Heritage Classical Academy.

Sincerely,

Wayne L. Norden
President
Near Northwest Management District

7603 Antoine Dr., Houston, Texas 77088
713-895-8021 www.nnmd.org

December 16,2020

Mt Canaan Missionary Baptist Church
7400 N Wayside Dr
Houston, Texas 77028

Re: Heritage Classical Academy — Charter Application

To Whom it may concern:

I am writing to express my strong support for Heritage Classical Academy, a proposed kindergarten through 8th grade charter school focused on classical education and civic virtue. Education is not a one-size-fits-all proposition. Every Houston family should be empowered with great choices: project-based learning, Montessori teaching, classical education, just to name a few. I am excited that Heritage Classical Academy seeks to employ a rigorous and proven phonics approach in early grades to build a solid foundation for reading and future academic success. Nothing can change the trajectory of a child more than a strong ability to read. I also am encouraged Heritage seeks to train young people in moral character and civic virtue — things that seem missing in our society today.

I know a classical charter school in northwest Houston would be a welcome addition to our community and a great education option for families. I am eager to see more Houston families gain access to another high-quality school choice option. Thank you for your consideration of Heritage Classical Academy.

Sincerely,



Rev. Paul M. Dirden
Associate Pastor
Mt. Canaan M.B.C.
7400 N. Wayside dr.
Houston, Texas 77028

GREATER HEIGHTS
AREA CHAMBER OF COMMERCE
Building your business and our community!

Chairman
Amy Ritter

Vice Chairman
Gene Reynolds

Treasurer
Tony Allman
Liliana Canga

Secretary
MaryBeth Wegner

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Liliana Canga
Jason Cantrelle
Brian Gilbert
Rick Hurst
Jessica Leone
Jim Murray
Lindsey Pollock
Gene Reynolds
Jack Van Pelt
Taylor Woodard

Founding Directors
Norman Adams
Jack Fields

Advisory Directors
Norman Adams
Scott Lester
Alan Rosen

Interim President
Dee Farino

Diamond Partners
Houston Highway Credit Union

Members Trust of the Southwest Federal Credit Union

Memorial Hermann Greater Heights

PrimeWay Federal Credit Union

December 15, 2020

Commissioner Mike Morath
Texas Education Agency
1701 N Congress Ave
Austin TX 78701

RE: Heritage Classical Academy, Charter Application

Dear Commissioner Morath,

Please find this letter expressing our support for Heritage Classical Academy in Houston, Texas. Education is so important in a child's life and the greatest thing that the local, state and government agencies can provide.

Nothing can change the life of a child more than education. A Classical Charter school in Northwest Houston would be a significant addition to our community and a welcome option for families.

I urge you to support the Heritage Classical Academy and help us establish new educational opportunities in our community

Sincerely

Dee Farino
President
Greater Heights Area Chamber of Commerce
president@heightschamber.org
713.861.6735

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:

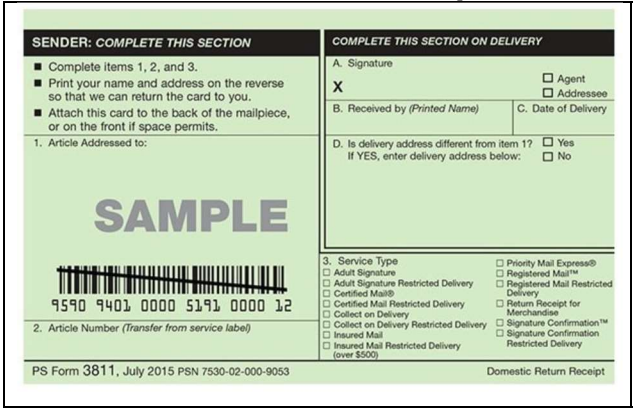
- **Each Superintendent and President of the Board of Trustees** of each traditional school district from which the proposed charter school intends to draw students;
- **Each member of the Texas Legislature** who represents the geographic area(s) to be served by the proposed charter school; and
- **Each 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, state senate, state house of representatives, and state board of education members. Limit six receipts per page.

Statement of Impact Forms are available in the *Additional Attachments PDF Forms* document on the New Operator 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



Certified Mail Receipt



Heritage Classical Academy: Attachment 5: Certified Mail Receipts



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

For delivery information, visit our website at 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

Postmark Here

RICH HILL POST OFFICE FEB 10 2021 HOUSTON, TX 77057-9998

7019 1640 0000 6263 6076

The Honorable Ron Reynolds
2440 Texas Parkway, Suite 102
Missouri City, TX 77489

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®.

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

Postmark Here

RICH HILL POST OFFICE FEB 10 2021 HOUSTON, TX 77057-9998

7019 1640 0000 6263 6069

The Honorable Ed Thompson
P O Box 2129
Pearland, TX 77588

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®.

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

Postmark Here

RICH HILL POST OFFICE FEB 10 2021 HOUSTON, TX 77057-9998

7019 1640 0000 6263 6052

The Honorable Alma Allen
10101 Fondren Suite 500
Houston, TX. 77096

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®.

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

Postmark Here

RICH HILL POST OFFICE FEB 10 2021 HOUSTON, TX 77057-9998

7019 1640 0000 6263 6045

The Honorable Gene Wu
6500 Rookin, Bldg C, Office 2
Houston, TX. 77074

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®.

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

Postmark Here

RICH HILL POST OFFICE FEB 10 2021 HOUSTON, TX 77057-9998

7019 1640 0000 6263 6038

Honorable Senfronia Thompson
10527 Homestead Road
Houston, TX. 77016

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®.

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

Postmark Here

RICH HILL POST OFFICE FEB 10 2021 HOUSTON, TX 77057-9998

7019 1640 0000 6263 6021

The Honorable Harold Dutton
8799 N. Loop East, Suite 305
Houston, TX. 77029

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

Heritage Classical Academy: Attachment 5: Certified Mail Receipts



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

For delivery information, visit our website at 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 P
$

Sent T
Street
City, S

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

RICH HILL POST OFFICE
FEB 10 2021
Postmark Here
HOUSTON TX 77057-9998

7019 1640 0000 6263 6014

The Honorable Ana Hernandez
1233 Mercury Drive
Jacinto City, TX. 77029

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

For delivery information, visit our website at 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
$

Sent T
Street
City, S

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

RICH HILL POST OFFICE
FEB 10 2021
Postmark Here
HOUSTON TX 77057-9998

7019 1640 0000 6263 6007

The Honorable MaryAnn Perez
101 S Richey Street Suite F
Pasadena, TX. 77506

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- ☐ Adult Signature Restricted Delivery $

Postage
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Total P
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Sent T
Street
City, S

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The Honorable Christina Morales
6815 Rustic Street
Houston, TX. 77087

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7019 1640 0000 6263 5987

The Honorable Shawn Thierry
2616 South Loop West #635
Houston, TX. 77054

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- ☐ Return Receipt (electronic) $
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- ☐ Adult Signature Required $
- ☐ Adult Signature Restricted Delivery $

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Street
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7019 1640 0000 6263 5970

The Honorable Garnet Coleman
5445 Almeda, Suite 501
Houston, TX. 77004

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- ☐ Adult Signature Restricted Delivery $

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HOUSTON TX 77057-9998

7019 1640 0000 6263 5963

Honorable Penny Morales Shaw
P O Box 2910
Austin, TX. 78768

Heritage Classical Academy: Attachment 5: Certified Mail Receipts



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- Return Receipt (electronic) $
- Certified Mail Restricted Delivery $
- Adult Signature Required $
- Adult Signature Restricted Delivery $

Postage
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Total P
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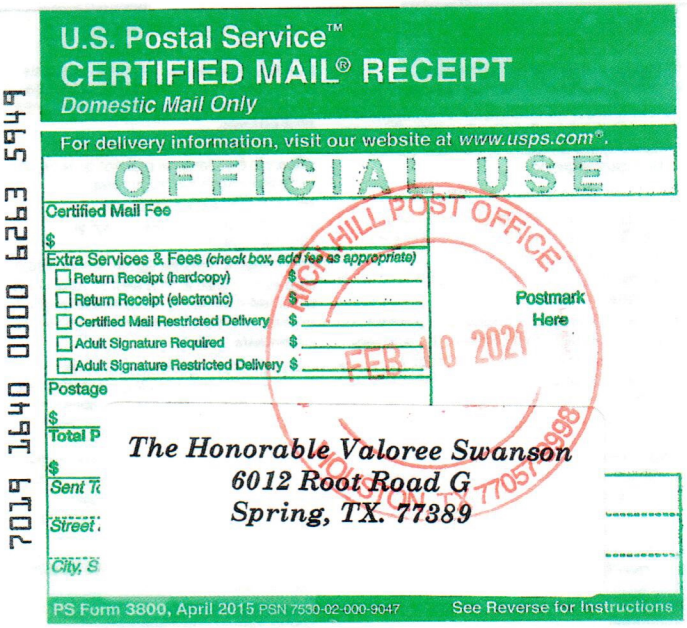
7019 1640 0000 6263 5956

RICH HILL POST OFFICE FEB 10 2021 HOUSTON TX 77057-9998

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The Honorable Hubert Vo
7474 South Kirkwood #106
Houston, TX. 77072

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- Return Receipt (hardcopy) $
- Return Receipt (electronic) $
- Certified Mail Restricted Delivery $
- Adult Signature Required $
- Adult Signature Restricted Delivery $

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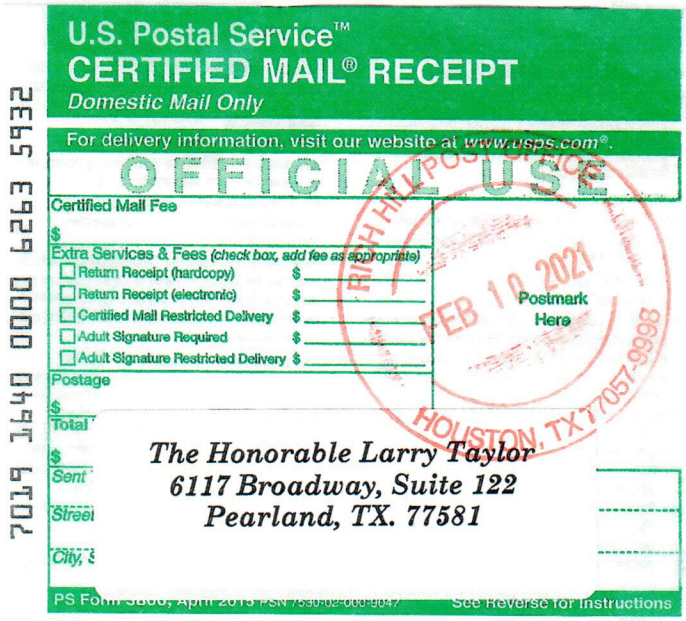
7019 1640 0000 6263 5949

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The Honorable Valoree Swanson
6012 Root Road G
Spring, TX. 77389

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- Return Receipt (electronic) $
- Certified Mail Restricted Delivery $
- Adult Signature Required $
- Adult Signature Restricted Delivery $

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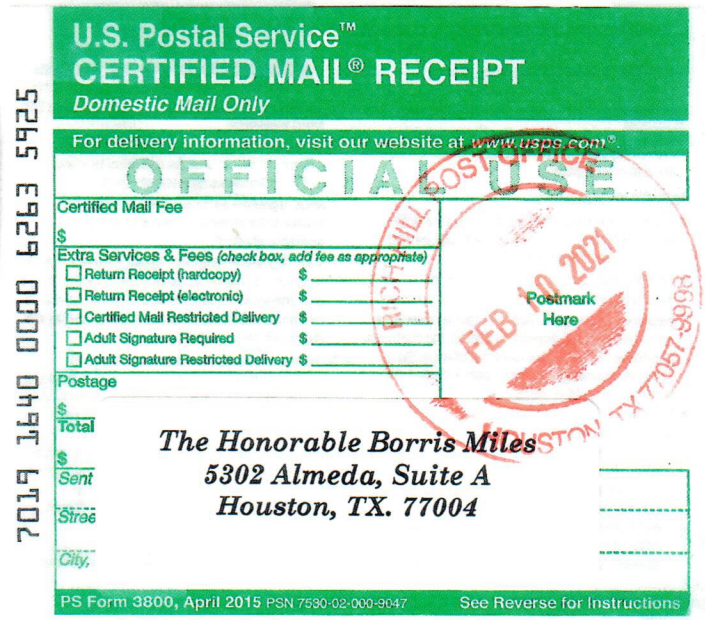
7019 1640 0000 6263 5932

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Postmark Here

The Honorable Larry Taylor
6117 Broadway, Suite 122
Pearland, TX. 77581

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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
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Total
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Sent
Street
City,

7019 1640 0000 6263 5925

RICH HILL POST OFFICE FEB 10 2021 HOUSTON TX 77057-9998

Postmark Here

The Honorable Borris Miles
5302 Almeda, Suite A
Houston, TX. 77004

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- Return Receipt (hardcopy) $
- Return Receipt (electronic) $
- Certified Mail Restricted Delivery $
- Adult Signature Required $
- Adult Signature Restricted Delivery $

Postage
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Total Pos
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Sent To
Street an
City, Stat

7019 1640 0000 6263 5901

RICH HILL POST OFFICE FEB 10 2021 HOUSTON TX 77057-9998

Postmark Here

Honorable Brandon Creighton
350 Pine Street, Suite 1450
Beaumont, TX. 77701

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Extra Services & Fees (check box, add fee as appropriate)
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- Return Receipt (electronic) $
- Certified Mail Restricted Delivery $
- Adult Signature Required $
- Adult Signature Restricted Delivery $

Postage
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Total
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Sent
Street
City,

7019 1640 0000 6263 5895

RICH HILL POST OFFICE FEB 10 2021 HOUSTON TX 77057-9998

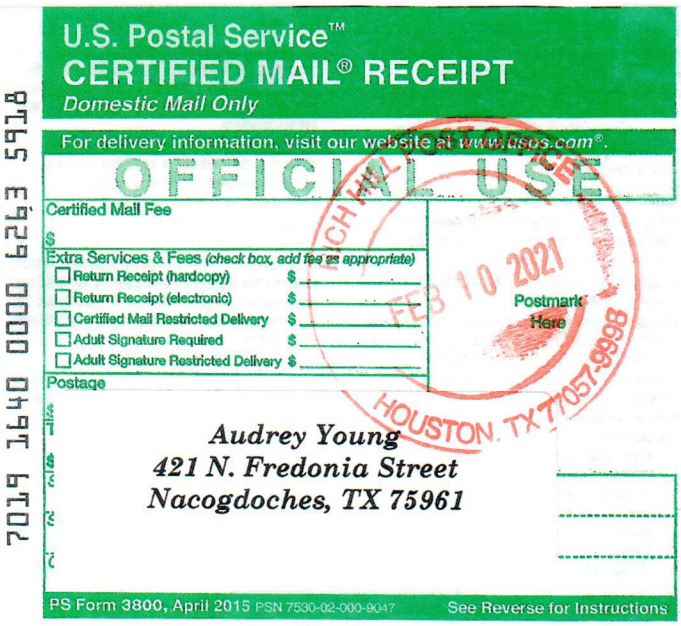
Postmark Here

The Honorable Lois Kolkhorst
2000 S Market St #101
Brenham, TX. 77833

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p. 196c

Heritage Classical Academy: Attachment 5: Certified Mail Receipts



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- ☐ Certified Mail Restricted Delivery $
- ☐ Adult Signature Required $
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Postage
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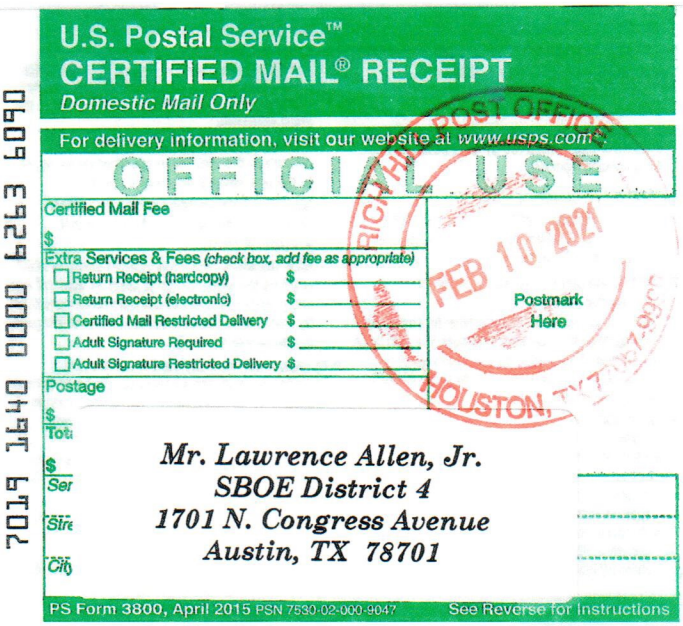
Sent
Street
City, State

Audrey Young
421 N. Fredonia Street
Nacogdoches, TX 75961

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- ☐ Certified Mail Restricted Delivery $
- ☐ Adult Signature Required $
- ☐ Adult Signature Restricted Delivery $

Postage
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Total
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Sent
Street
City, State

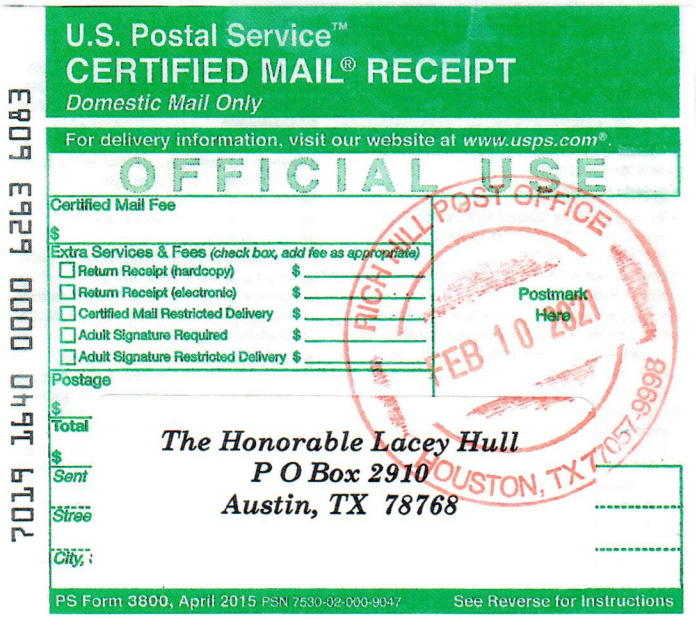
Mr. Lawrence Allen, Jr.
SBOE District 4
1701 N. Congress Avenue
Austin, TX 78701

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7019 1640 0000 6263 6090

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Resent ↑ was Not received in first mailing; returned unclaimed



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- ☐ Certified Mail Restricted Delivery $
- ☐ Adult Signature Required $
- ☐ Adult Signature Restricted Delivery $

Postage
$

Total
$

Sent
Street
City, State

The Honorable Lacey Hull
P O Box 2910
Austin, TX 78768

RICHMOND POST OFFICE FEB 10 2021 Postmark Here HOUSTON, TX 77057-9998

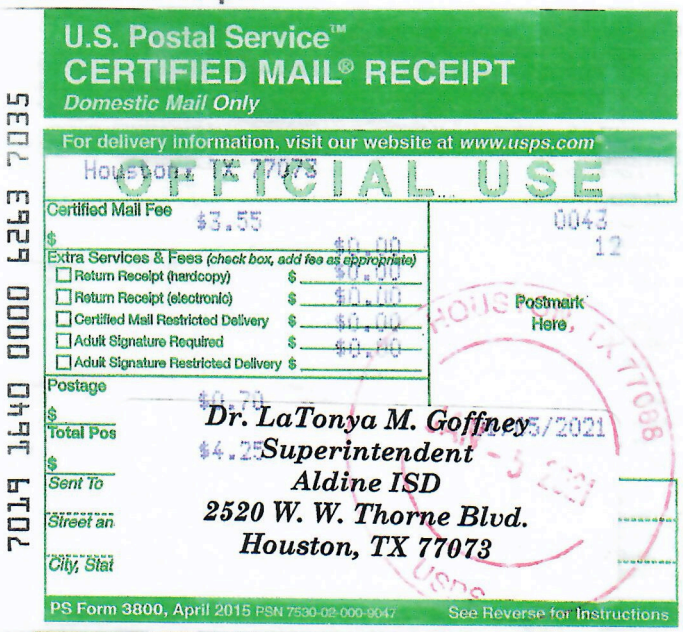
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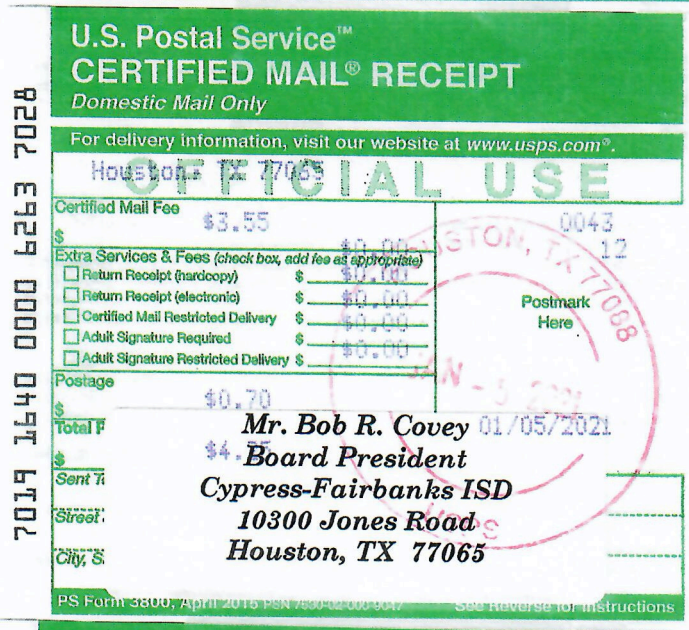
PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

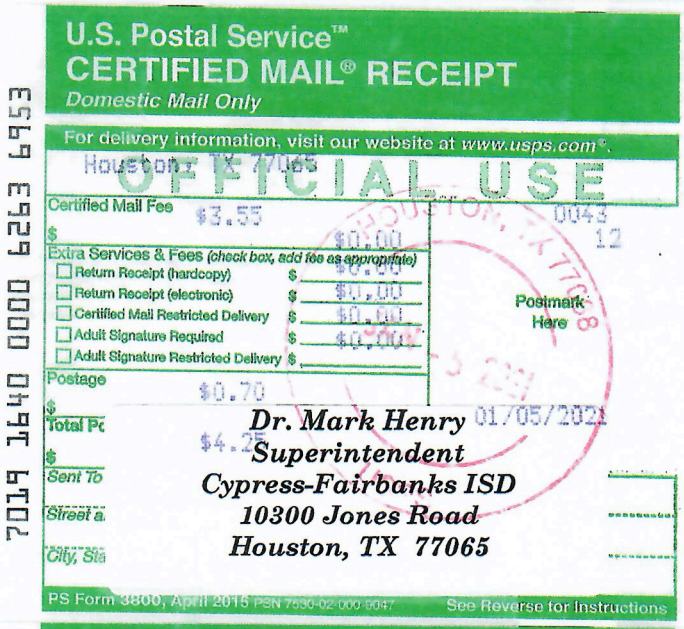
← Resent; returned unclaimed from first mailing.

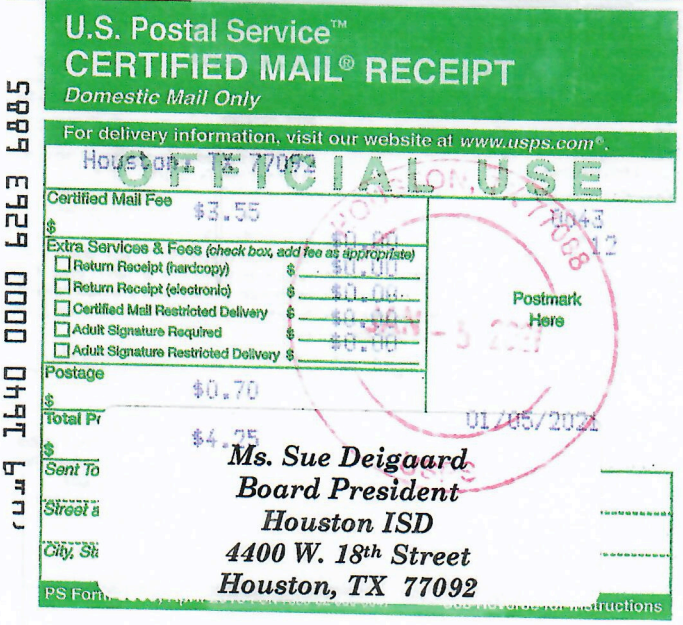
Attachment 5: Certified Mail Receipts

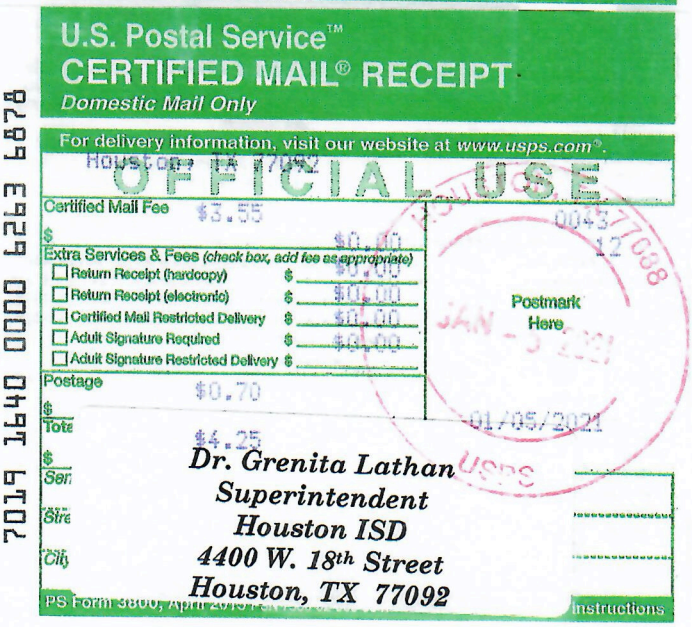






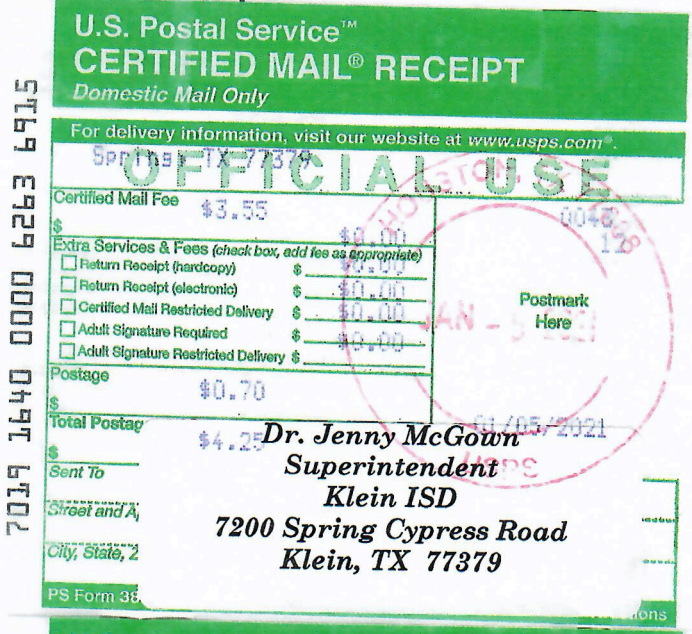




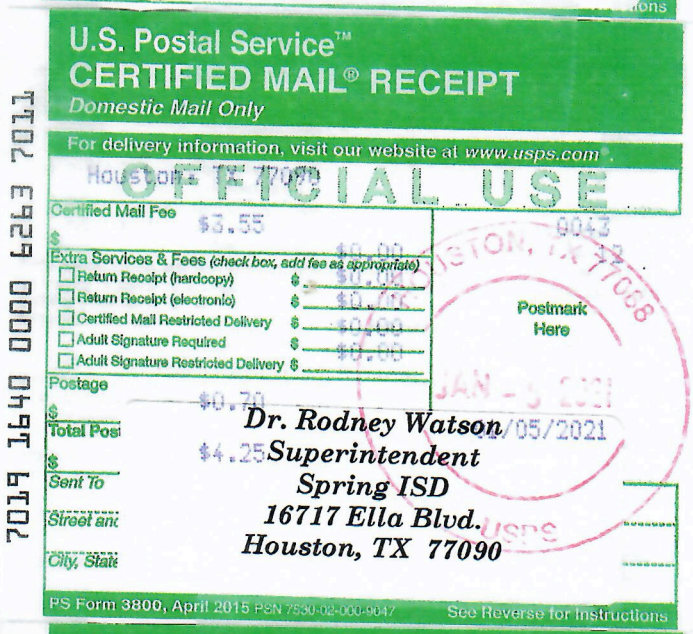


Attachment 5: Certified Mail Receipts

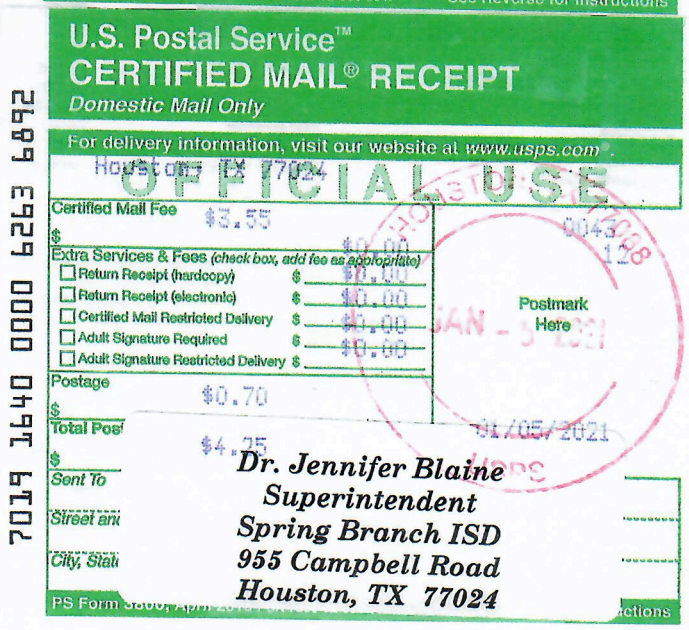




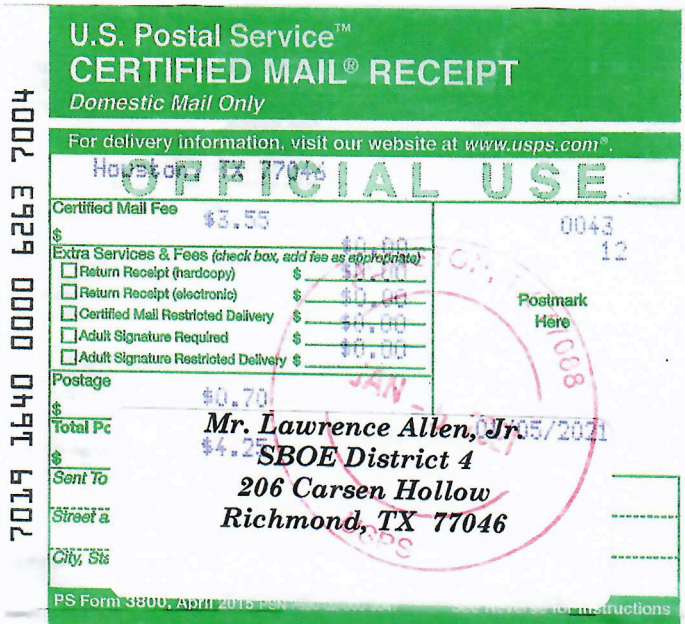








Attachment 5: Certified Mail Receipts



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- Adult Signature Required $0.00
- Adult Signature Restricted Delivery $

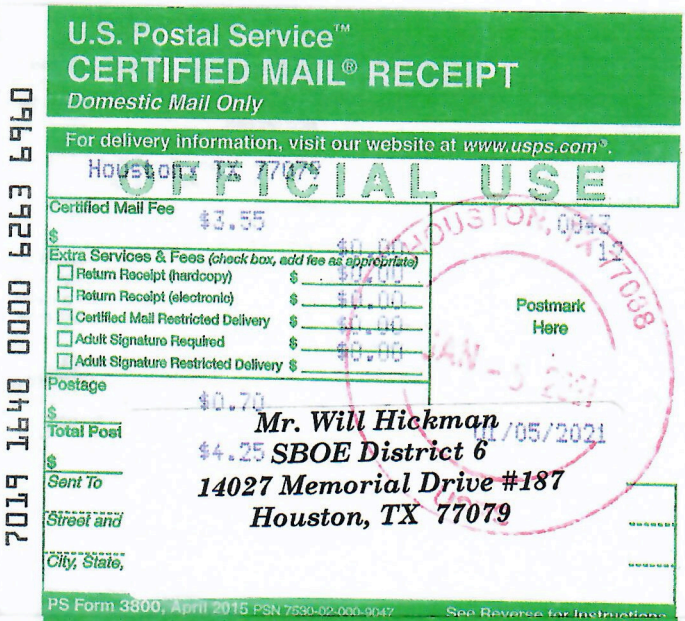
Postage $0.70
Total Postage $4.25
Sent To
Street and
City, State,

Postmark Here
JAN - 5 2021
01/05/2021

Mr. Lawrence Allen, Jr.
SBOE District 4
206 Carsen Hollow
Richmond, TX 77046

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- Return Receipt (electronic) $0.00
- Certified Mail Restricted Delivery $0.00
- Adult Signature Required $0.00
- Adult Signature Restricted Delivery $

Postage $0.70
Total Postage $4.25
Sent To
Street and
City, State,

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JAN - 5 2021
01/05/2021

Mr. Will Hickman
SBOE District 6
14027 Memorial Drive #187
Houston, TX 77079

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- Return Receipt (electronic) $0.00
- Certified Mail Restricted Delivery $0.00
- Adult Signature Required $0.00
- Adult Signature Restricted Delivery $

Postage $0.70
Total Postage $4.25
Sent To
Street and
City, State,

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01/05/2021

The Honorable Carol Alvarado
4450 Harrisburg
Suite 400
Houston, TX 77011

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- Return Receipt (electronic) $0.00
- Certified Mail Restricted Delivery $0.00
- Adult Signature Required $0.00
- Adult Signature Restricted Delivery $

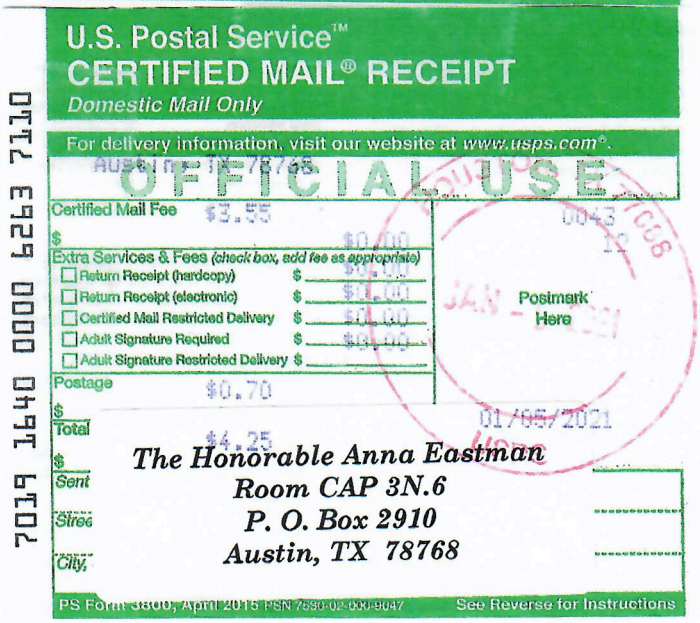
Postage $0.70
Total Postage $4.25
Sent To
Street and
City, State,

Postmark Here
JAN - 5 2021
01/05/2021

The Honorable Paul Bettencourt
11451 Katy Freeway
Suite 209
Houston, TX 77079

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- Return Receipt (electronic) $0.00
- Certified Mail Restricted Delivery $0.00
- Adult Signature Required $0.00
- Adult Signature Restricted Delivery $

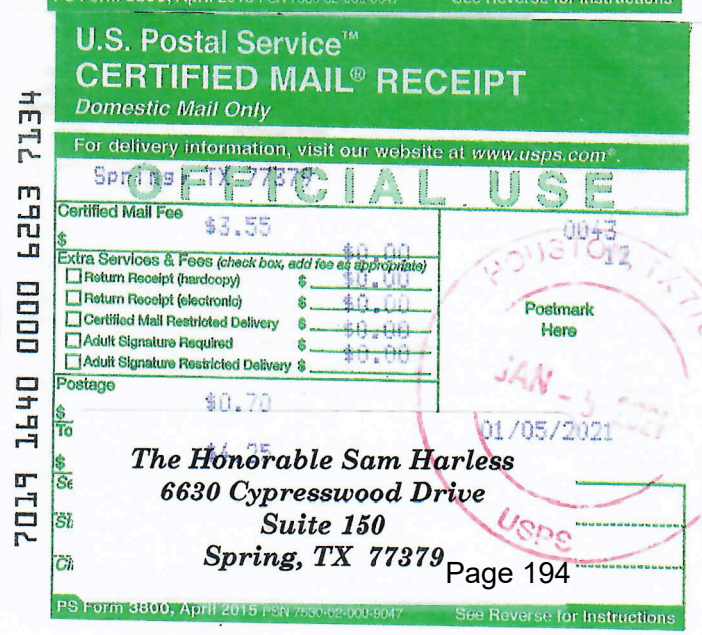
Postage $0.70
Total Postage $4.25
Sent To
Street and
City, State,

Postmark Here
JAN - 5 2021
01/05/2021

The Honorable Anna Eastman
Room CAP 3N.6
P. O. Box 2910
Austin, TX 78768

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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 $

Postage $0.70
Total Postage $4.25
Sent To
Street and
City, State,

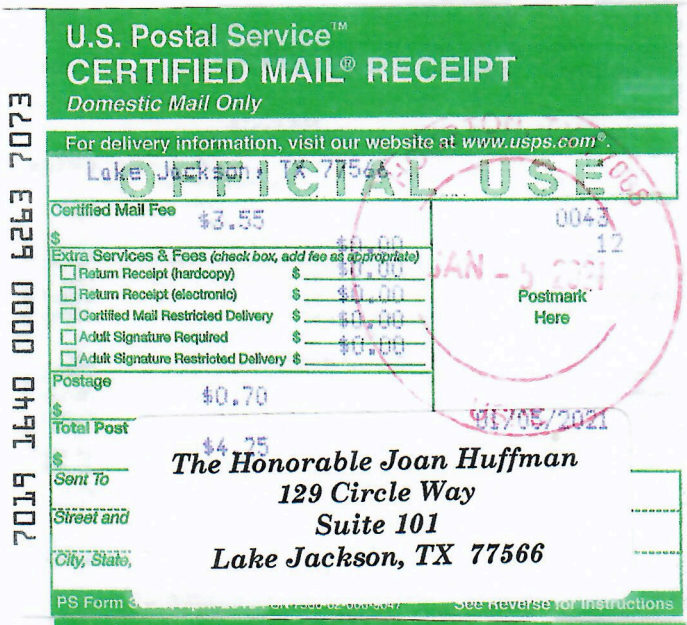
Postmark Here
JAN - 5 2021
01/05/2021

The Honorable Sam Harless
6630 Cypresswood Drive
Suite 150
Spring, TX 77379

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

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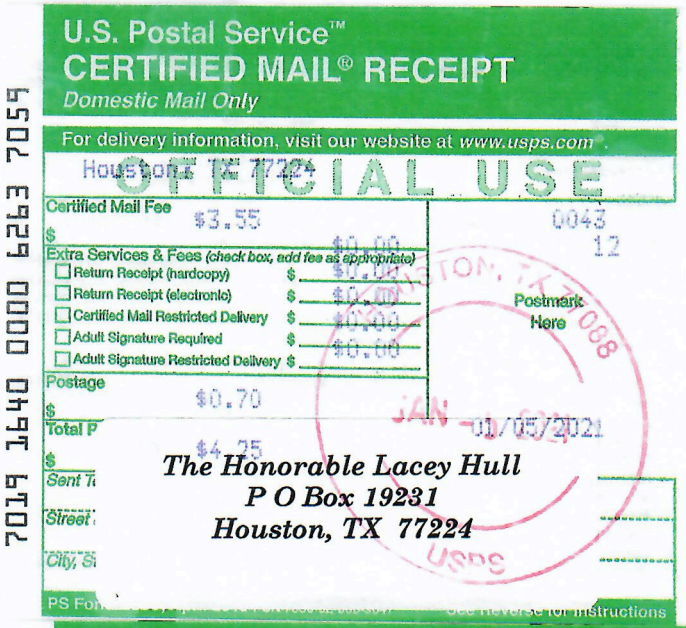
Certified Mail Fee $3.55
Extra Services & Fees (check box, add fee as appropriate)
Return Receipt (hardcopy) $0.00
Return Receipt (electronic) $0.00
Certified Mail Restricted Delivery $0.00
Adult Signature Required $0.00
Adult Signature Restricted Delivery $
Postage $0.70
Total Post $4.25
Sent To
Street and
City, State,

The Honorable Joan Huffman
129 Circle Way
Suite 101
Lake Jackson, TX 77566

Postmark Here
0043 12
JAN - 5 2021
01/05/2021

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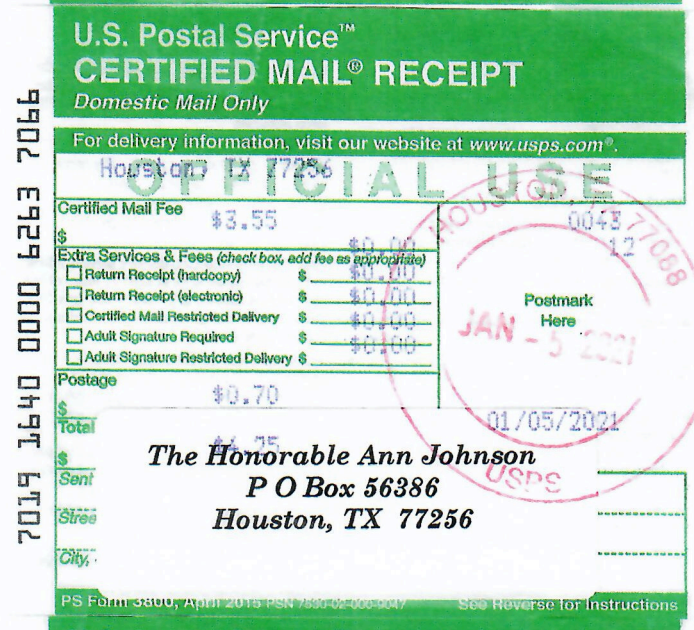
Certified Mail Fee $3.55
Extra Services & Fees (check box, add fee as appropriate)
Return Receipt (hardcopy) $0.00
Return Receipt (electronic) $0.00
Certified Mail Restricted Delivery $0.00
Adult Signature Required $0.00
Adult Signature Restricted Delivery $
Postage $0.70
Total P $4.25
Sent T
Street
City, S

The Honorable Lacey Hull
P O Box 19231
Houston, TX 77224

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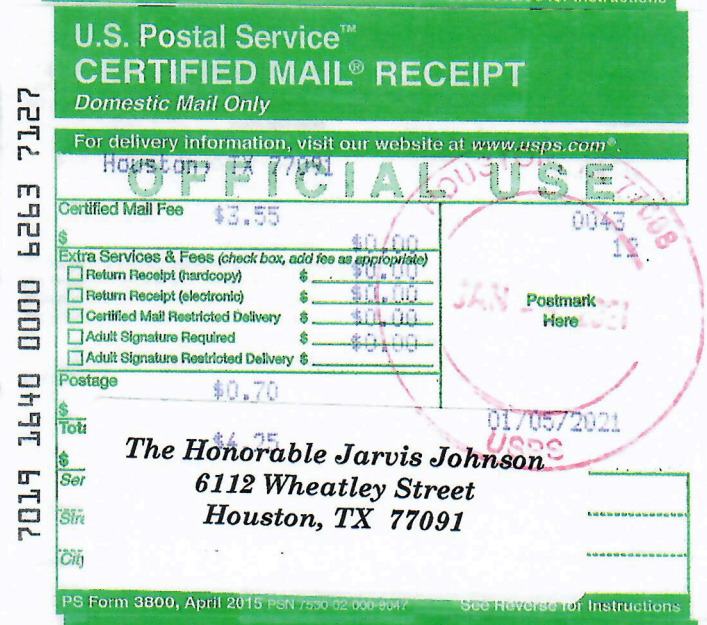
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The Honorable Ann Johnson
P O Box 56386
Houston, TX 77256

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

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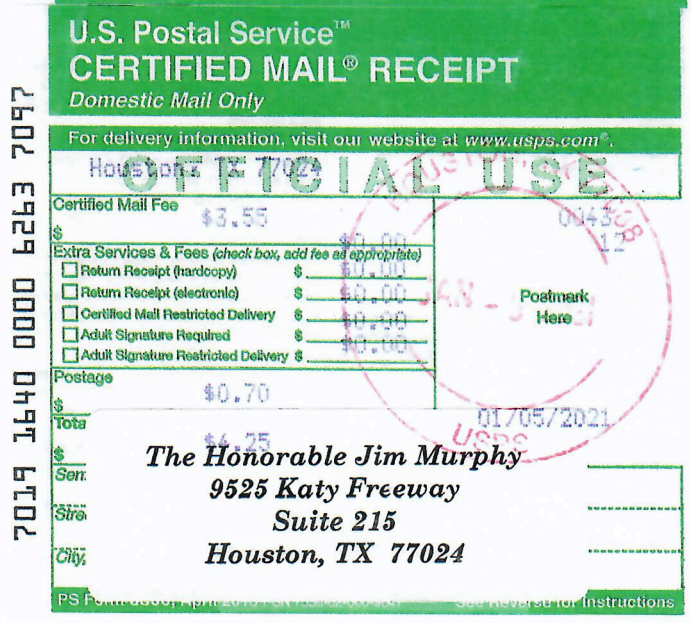
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The Honorable Jarvis Johnson
6112 Wheatley Street
Houston, TX 77091

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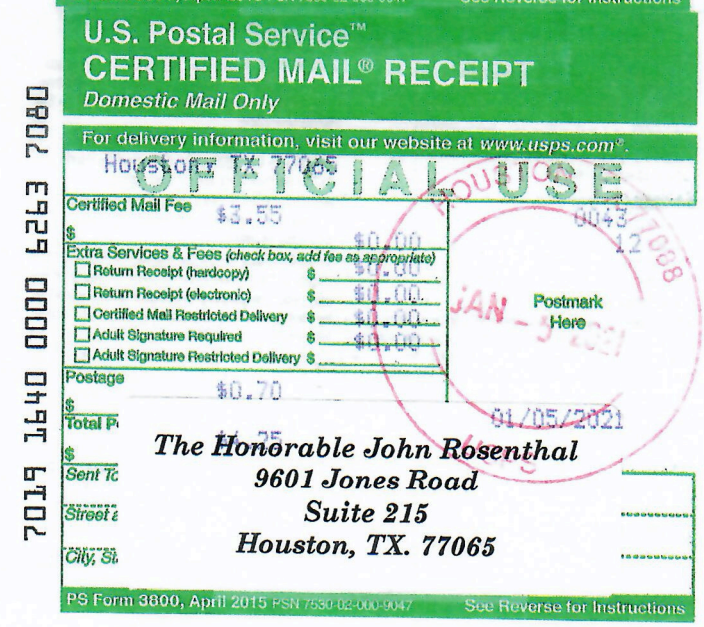
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The Honorable Jim Murphy
9525 Katy Freeway
Suite 215
Houston, TX 77024

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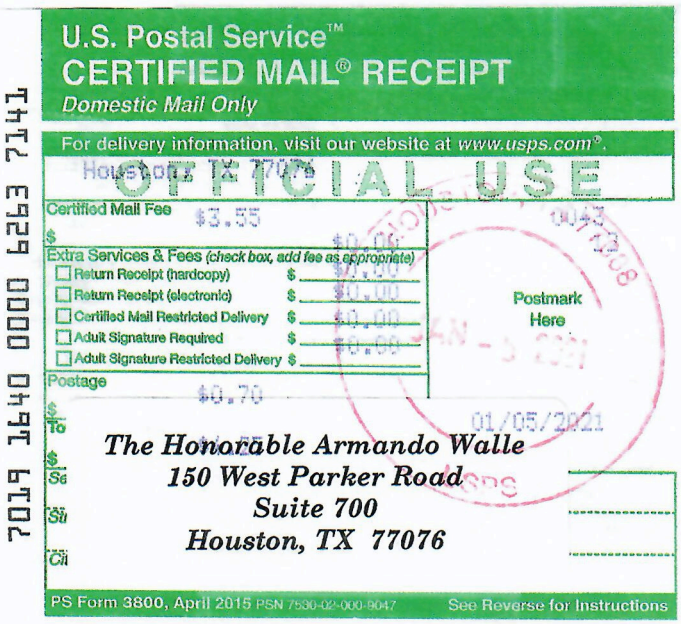
The Honorable John Rosenthal
9601 Jones Road
Suite 215
Houston, TX. 77065

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JAN - 5 2021
01/05/2021

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

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Attachment 5: Certified Mail Receipts



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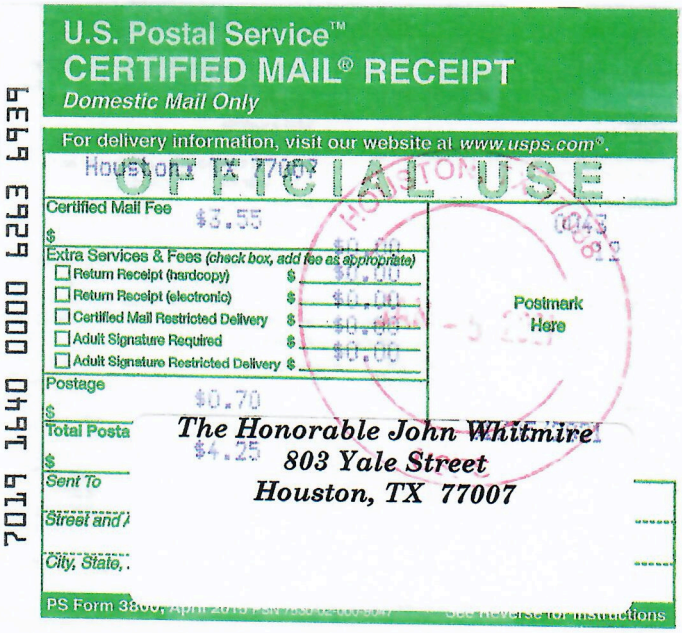
Postage $0.70

Postmark Here

01/05/2021

The Honorable Armando Walle
150 West Parker Road
Suite 700
Houston, TX 77076

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



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- Return Receipt (hardcopy) $
- Return Receipt (electronic) $
- Certified Mail Restricted Delivery $
- Adult Signature Required $
- Adult Signature Restricted Delivery $

Postage $0.70

Total Postage $4.25

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The Honorable John Whitmire
803 Yale Street
Houston, TX 77007

GENERATION TWENTY-SIX
OPEN-ENROLLMENT CHARTER APPLICATION
Statement of Impact

Purpose of this form: The sponsoring entity identified on the cover letter is submitting an application to the commissioner of education for approval to operate an open-enrollment charter school. The name and location, if known, of the proposed charter school are provided below. As required in Texas Education Code §12.1101, this form must be sent to the President of the Board of Trustees of each traditional district and charter from which the proposed school intends to draw students, to each member of the Texas state legislature, and the State Board of Education member that represents the geographic area to be served by the proposed school. A school district **may** submit this form to provide the commissioner with information relating to any financial difficulty that a loss in enrollment may have on the district or open-enrollment charter school, and any other information that a district wishes to share with the commissioner. For more information about the proposed charter, please contact the sponsoring entity.

Instructions: Should you choose, to respond, return the completed form no later than Monday, February 15, 2021 to:
charterapplication@tea.texas.gov

Note: See Texas Education Code §12.106 for information about state funding.

Name of Proposed Charter School: Heritage Classical Academy

Physical Address or General Location of Proposed Charter School: We are seeking a location in the zip codes 77018, 77088, 77091, or 77092 within Houston ISD.

Check the appropriate response below:

☐ The proposed open-enrollment charter school **is not** expected to adversely impact the district to a significant degree.

☐ The proposed open-enrollment charter school **is** expected to have a major impact on the district in the following manner:

(Describe the impact in the space below and/or attach any supporting documentation.)

District Name

County-District Identification Number

District Address

Signature of Superintendent

Signature of Board President

Print Superintendent's Name

Print Board President's Name

Date

Phone Number

HERITAGE
CLASSICAL ACADEMY

January 4, 2021

The Honorable Armando Walle
House of Representatives #140
150 West Parker Road
Suite 700
Houston, TX. 77076

Dear Representative Walle,

This letter is to inform you that **Heritage Classical Academy** intends to submit an application to the Texas Education Agency in response to the Generation Twenty-Six 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 primary geographic boundary will include the following districts: **Houston ISD, Spring Branch ISD and Aldine ISD.** In addition, the proposed charter school will have a transfer policy whereby it may admit students residing outside of the designated geographic boundary once all eligible applicants residing within the geographic boundary have submitted a timely application and been enrolled. The transfer boundary will include the following districts: **Cypress-Fairbanks ISD, Spring ISD and Klein 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:

charterapplication@tea.texas.gov

Forms must be received no later than **Monday, February 15, 2021,** 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) 463-9575 or

visit **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 19, 2021. If you would like a complete application prior to that date, please contact **Heritage Classical Academy** at **713-914-9778.**

Sincerely,

Stuart D. Saunders
Chairman of the Board
Heritage Classical Academy

Enclosures: Statement of Impact Form
Application Coversheet

cc: Legislative Representatives in Proposed Geographic Boundaries
State Board of Education Members in Proposed Geographic Boundaries

Attachment 6: Published Notice(s) of Public Meeting

(This section contains the published meeting notices that were contained in Attachment 6 in the HCA GEN 25 charter school application.)

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 26 open-enrollment charter school.

Applicants may hold a public virtual meeting in fulfillment of this attachment requirement. Any virtual meetings must be published in accordance with the notice requirements outlined below. The public notice must contain directions to access and participate in the meeting (link, website, etc.)

Applicants are encouraged to practice social-distancing policies and procedures for all in-person meetings.

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 20, 2019** are not eligible for consideration.

Anyone may attend and participate in the public meeting.

ATTENTION: All submitted notices must be dated prior to **January 20, 2021**.

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;
- Names of all board members from the sponsoring entity; and
- If virtual, directions to access and participate in the meeting.

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 or exclusively digital circulation (*Greensheet, Dallas Observer, Austin Chronicle,* etc.) will not fulfill this attachment requirement.

ADDITIONAL REQUIREMENT: Applicants must notify within 5 business days, 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 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;
- Names of all board members from the sponsoring entity; and
- If virtual, directions to access and participate in the meeting.

Runoff for vacant Texas House seat set for January

By Adam Zuvanich
azuvanich@theleadernews.com

Anna Eastman and Luis La Rotta, the top two candidates in a crowded race for the area's vacant seat in the Texas House of Representatives, have nearly two months to gear up for a runoff election.

Gov. Greg Abbott recently announced that Jan. 28 has been set as the runoff date for three special elections for open Texas House seats, including the District 148 seat vacated by Democrat Jessica Farrar in September. Fifteen candidates campaigned to replace Farrar, with Eastman and La Rotta receiving the most votes in the Nov. 5 election.

Eastman, a Heights Democrat, led all candidates by receiving 20.3 percent of the 20,659 votes cast. La Rotta, a Republican, received 15.8 percent of the vote.

Early voting for the runoff begins Jan. 21.

Legion post taking donations

From Staff Reports

American Legion Post 560 in Garden Oaks is collecting toys for the Houston Blue Santa program, an annual initiative by the Houston Police Department to provide toys to children in need during the holiday season.

Legion members and supporters, along with community members, are encouraged to drop off new, unwrapped toys for children who are infants through age 14 at the post's Blue Santa Depot Box at 3720 Alba Rd. The box will be available for dropoffs from noon-8 p.m. every day through Friday, Dec. 13.

Another break-in at St. Rose

From Staff Reports

Five months after collection money was stolen from a safe at St. Rose of Lima Catholic Church, it is dealing with the aftermath of another break-in.

In an email to parishioners, Father Rafael Becerra said a break-in attempt was made at about 9 p.m. Nov 20 at the church, located at 3600 Brinkman St. He said administrators arrived afterward to find broken glass in the window of the chapel's exterior door.

"Thankfully no entry was made and nothing was stolen," Becerra wrote in his Nov. 21 email. "... We were blessed that no members of our St. Rose family were affected in last night's incident."

The church was burglarized in June, when according to the Houston Police Department, one or two males gained entry through a window and stole an undisclosed amount of cash from a safe that contained collection money.

"Plans are already in discussion for additional security measures that can be implemented in and around our campus," Becerra wrote in his latest email to parishioners.

In the meantime, Becerra asked church members and the community at large to be vigilant when visiting the church.



Holiday home tour Dec. 6-7

From Staff Reports

Five festive homes in the Heights will be showcased next weekend during the 30th Annual Houston Heights Association Holiday Home Tour.

According to a Facebook post by the Houston Heights Association, this year's tour is scheduled for 6-9 p.m. Friday, Dec. 6 and 3-9 p.m. Saturday, Dec. 7 and will feature a restored Victorian home, a quirky original cottage and three renovated craftsman bungalows. They are the Deisch home at 525 W. 18th St., the Kirksey home at 1133 Arlington St., Sara's Bed and Breakfast Inn at 941 Heights Blvd., the Starr home at 1811 Harvard St. and the Wright home at 440 Heights Blvd.

Tickets are $25 and available online at http://stores.houstonheightsstore.org/products.php. They can be picked up on either day of the tour at the Heights Fire Station, 107 W. 12th St. Shuttles to and from the homes will be available at the fire station.





DO YOU DESIRE AN EXCELLENT EDUCATION FOR YOUR CHILD?

Heritage Classical Academy, a proposed tuition-free public charter school, plans to open in your neighborhood in the Fall of 2021.

JOIN US FOR INFORMATION MEETINGS TO LEARN MORE!

TUESDAY, DECEMBER 3 • 6 7:30 p.m.
SATURDAY, JANUARY 11 • 9:30 11a.m.

WHITE OAK CONFERENCE CENTER
7603 Antoine Dr., Houston, TX 77088
Complimentary refreshments and childcare will be provided.

WHY CHOOSE HERITAGE CLASSICAL ACADEMY?

- IT IS FREE. No tuition for this world-class education.
- Provides a strong foundation in reading.
- First year is kindergarten and first grade, will grow to K-8.
- Before and after school care available.
- Music and art taught in lower grades.
- Speech therapy and other special needs support.

PLEASE RSVP
hcawhiteoak.eventbrite.com
or call us at: 713.914.9778

Like Us on Facebook:
Heritage Classical Academy Houston

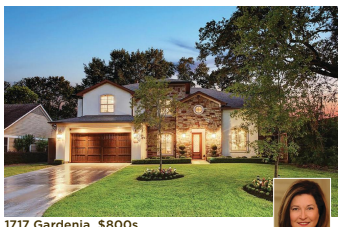
HERITAGE CLASSICAL ACADEMY admits students of any race, color, national and ethnic origin to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admission policies, athletics and other school-administered programs.

GREENWOOD KING PROPERTIES
a place to find your home


816 Arlington, $1+ Mil
Amanda Anhorn, 713.256.5123


721 Sue Barnett, $500s
Jason Knebel, 713.232.9712


4510 Walker, $400s
Jenny Puls, 832.304.3139


1717 Gardenia, $800s
Amanda Anhorn, 713.256.5123

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Houston, Texas.

.com/legals

2019-867 – AN ORDINANCE granting to BLACKWOOD PORTABLE RESTROOMS, LLC, a Texas limited liability company, the right, privilege, and franchise to collect, haul, and transport solid waste and industrial waste from commercial properties located within the City of Houston, Texas, pursuant to Chapter 39, Code of Ordinances, Houston, Texas; providing for related terms and conditions; and making certain findings related thereto. - FIRST READING

2019-868 – AN ORDINANCE granting to BLUE WATER GREASE SERVICES INC., a Texas corporation, the right, privilege, and franchise to collect, haul, and transport solid waste and industrial waste from commercial properties located within the City of Houston, Texas, pursuant to Chapter 39, Code of Ordinances, Houston, Texas; providing for related terms and conditions; and making certain findings related thereto - FIRST READING

2019-869 – AN ORDINANCE granting to ENVIRONMENTAL EARTH-WISE, INC ENVIRONMENTAL REMEDIATION & CONSTRUCTION, a Texas limited liability company, the right, privilege, and franchise to collect, haul, and transport solid waste and industrial waste from commercial properties located within the City of Houston, Texas, pursuant to Chapter 39, Code of Ordinances, Houston, Texas; providing for related terms and conditions; and making certain findings related thereto - FIRST READING

2019-870 – AN ORDINANCE granting to LEL ENVIRONMENTAL LTD., a Texas limited partnership, the right, privilege, and franchise to collect, haul, and transport solid waste and industrial waste from commercial properties located within the City of Houston, Texas, pursuant to Chapter 39, Code of Ordinances, Houston, Texas; providing for related terms and conditions; and making certain findings related thereto - FIRST READING

2019-871 – AN ORDINANCE granting to MILLENNIAL TRUCKING, LLC, a Texas limited liability company, the right, privilege, and franchise to collect, haul, and transport solid waste and industrial waste from commercial properties located within the City of Houston, Texas, pursuant to Chapter 39, Code of Ordinances, Houston, Texas; providing for related terms and conditions; and making certain findings related thereto - FIRST READING

The entire ordinance may be found and inspected in the Office of the Secretary, 900 Bagby, Room P-101, City Hall Annex, Houston, Texas.

Anna Russell

City Secretary

Publish: 11/25, 12/02

LEGAL NOTICES & ANNIVERSARIES

TWO THINGS YOU BETTER NOT FORGET ABOUT

Seriously, stay legal and get noticed by emailing our team at legals@chron.com or calling 713.224.6868

HOUSTON CHRONICLE
HoustonChronicle.com

Heritage Classical Academy, a proposed tuition-free public charter school with plans to open in Houston in the fall of 2021, will hold public information meetings on Tuesday, December 3, 2019 from 6-7:30pm and Saturday, January 11, 2020 from 9:30-11am. The meetings will be held at White Oak Conference Center, 7603 Antoine Drive, Houston, TX 77088. The sponsoring entity is Heritage Ed., a Texas non-profit corporation. The board of directors for Heritage Ed. are as follows: Chelsea Collins, E.F. Mano DeAyala, Richard Hendee, Stuart D. Saunders, Debra Schindler and Kathryn van der Pol. For more information, call: 713.914.9778.

LEGAL NOTICE
Harris County Department of Education
is seeking E-Rate services for E-Rate Funding Year 2020 (July 1, 2020 - June 30, 2021)
All interested vendors please visit:
https://portal.usac.org/suite/
Form 470 Application Number: 200009744
Please see RFP at https://erate.esc12.net/R12

PUBLIC NOTICE
Effective December 23, 2019, Dr. Stephanie Jacks will no longer be affiliated with Texas Children's Hospital and Baylor College of Medicine. Requests for medical records may be submitted by calling 936-267-5885.

IF YOU THINK LEGAL NOTICES ARE PAINFUL, WAIT UNTIL YOU PLACE ONE IN THE WRONG PAPER.

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HOUSTON CHRONICLE
HoustonChronicle.com

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Trump signs law to help slash robocalls

To place legal notices
email legals@chron.com or call 713.224.6868.

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NOTICE OF LOCATION OF ADMINISTRATIVE OFFICE

Notice is hereby given that the street address of the administrative office of Harris County Emergency Services District No. 9 is 9630 Telge Road, Houston, Texas 77095.

NOTICE OF LOCATION OF ADMINISTRATIVE OFFICE

Notice is hereby given that the street address of the administrative office of Harris-Fort Bend Emergency Services District No. 100 is 16003 Bellaire Blvd., Houston, Texas 77083.

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Notice To Creditors Ad
$74.00*
Call the Legals Team
713-224-6868
Ext. 6435 or 4204
*$74.00 includes first 36 lines and 1 Affidavit of Publication
*$1.92 per line over 36 lines

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HOUSTON ★ CHRONICLE
HoustonChronicle.com

LEGAL NOTICES | LEGAL NOTICES

APPLICATION HAS BEEN MADE WITH THE TEXAS ALCOHOLIC BEVERAGE COMMISSION FOR A BEER RETAIL DEALER'S OFF-PREMISE LICENSE, A WINE ONLY PACKAGE STORE PERMIT AND A PACKAGE STORE TASTING PERMIT BY QUALITY LICENSING CORP. D/B/A QUALITY LICENSING CORP. (STORE #5094) LOCATED AT 9700 HILLCROFT ST, HOUSTON, HARRIS COUNTY, TEXAS 77096. OFFICERS OF SAID COMPANY ARE JOHN SCUDDER, PRESIDENT/CEO; MATTHEW W. ALLEN, VP; WAYNE HAMILTON, VP; ANDREA M. LAZENBY, ASSISTANT SECRETARY; DANIEL JOHN RICE, ASSISTANT SECRETARY.

Notice to Patients
Transfer of Medical Records
22 Texas Administrative Code 165.5
Effective January 31, 2020, Dr. Victor Fainstein will be retiring from Houston Methodist Academic Medicine Associates. For questions regarding transfer of medical records, please contact Rhonda Readeaux at (713) 799-9997.

Please be advised
Lynn Copeland, MD, FACP, FACG
Will be retireing from his gastroenterology medical practice effective 1/17/2019
Contact Digestive Specialists, PA at
936-321-0033
To transfer care to another GI physician within the practice or obtain a copy of medical records

Heritage Classical Academy, a proposed tuition-free public charter school with plans to open in Houston in the fall of 2021, will hold a public information meeting on Saturday, January 11, 2020 from 9:30-11am. The meeting will be held at White Oak Conference Center, 7603 Antoine Drive, Houston, TX 77088. The sponsoring entity is Heritage Ed., a Texas non-profit corporation. The board of directors for Heritage Ed. are as follows: Chelsea Collins, E.F. Mano DeAyala, Richard Hendse, Stuart D. Saunders, Debra Schindler and Kathryn van der Pol. For more information, call: 713.914.9776.

LEGAL NOTICES & ANNIVERSARIES

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Order Confirmation

Ad Order Number	Customer	Payor Customer	PO Number
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Sales Rep.	**Customer Account**	**Payor Account**	**Ordered By**
HC0630	[redacted]	[redacted]	Misty Cornelius
Order Taker	**Customer Address**	**Payor Address**	**Customer Fax**
cwolford	602 SAWYER ST. SUITE 720 HOUSTON TX 77007 USA	602 SAWYER ST. SUITE 720 HOUSTON TX 77007 USA	
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	Customer Phone	**Payor Phone**	
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Ad Order Notes

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Product	Placement	Position	First Run Date	Last Run Date
Houston Chronicle	Legal	Legal Notices	Monday, November 25, 2019	Monday, November 25, 2019
Online	Legal	Legal Notices	Monday, November 25, 2019	Monday, November 25, 2019

HC MEDIA GROUP
HEARST corporation

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MAY 19, 2022

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Victoria Bond A/R Clerk
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VERONICA M TYRONE 7163357 NOTARY PUBLIC STATE OF TEXAS EXPIRES FEB. 10, 2020

Veronica M Tyrone
Notary Public in and for the State of Texas

Attachment 7: Sample Course Scope and Sequence

(The new scope and sequence has been adapted from Attachment 7 pages 179-186 in the HCA GEN 25 charter application.)

Provide a sample scope and sequence for one course in a state-assessed core content area that will be taught within the first three years of operation (as required).

Heritage Classical Academy Grade 1 ELAR
Scope and Sequence

1st 3 weeks: Foundational literacy skills (Review of Kindergarten Skills)

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 The Frog Prince *Dear Abuela* *Where Are You From?*	Fairytale Fiction Fiction	2Ai, iii, v Listening Phoneme Isolate Onset-Rime Blend Syllable Segment Rhyme	2Bi, iii Decoding closed syllables 2Ci Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words…	2B Build Fluency: Sound/ Spellings	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Main characters, distinguishing characteristics of literature 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Di, viii Subject-verb, capital. 12A Literary texts	13A Generate questions
WEEK 2 Hansel and Gretel Sing a Song of People *Abuelita's Secret*	Fairytale Poetry Fiction	2Ai, iii, v Listening Phoneme Isolate Onset-Rime Blend Syllable Segment Rhyme	2Bi, iii Decoding closed syllables 2Ci Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words…	2B Build Fluency: Sound/ Spellings	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Main characters, distinguishing characteristics of literature 10D: How author uses words to visualize	2F Handwriting 11A-E Writing Process 11Di, viii Subject-verb, capital. 12A Literary texts	13A Generate questions
WEEK 3 Thumbelina Little Finger of the Watermelon Patch *The Legend of Coquí*	Fairytale Different Lands, Similar Stories Legend	2Ai, v, vii Listening Phoneme Blend Phoneme Segment Rhyme	2Bi, iii Decoding closed syllables 2Ci Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words…	2B Build Fluency: Sound/ Spellings	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Main characters, distinguishing characteristics of literature 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Di, viii Subject-verb, capital. 12A Literary texts	13A Generate questions

*See the last page for an explanation of how the Oral Language expectations will be embedded across classrooms.

Grade 1 Unit 1

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 Tom Thumb The Pasture *Call Me Tree*	 Fairytale Poetry Fiction	2Ai, iii, v, vii Rhyme Phoneme Isolate Phoneme Blend Phoneme Segment	2Bi, iii Decoding closed syllables 2Ci Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words…	4 Intonation	6D: Create mental images 7C: Use text evidence 8B, D: Main characters, setting 9B: Rhyme, rhythm, repetition, alliteration 10D: How author uses words to visualize	2F Handwriting 11A-E Writing Process 11Di, viii Subject-verb, capital. 12A Literary texts	13A Generate questions
WEEK 2 The Wolf in Sheep's Clothing I Know All the Sounds the Animals Make *My Big Family*	 Fable Poetry Fiction	2Aii, iii, v, vii Alliteration Phoneme Categorize Phoneme Blend Phoneme Segment	2Bi, iii Decoding closed syllables 2Ci, Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words…	4 Phrasing	6D: Create mental images 7C: Use text evidence 8B, D: Main characters, setting 9B: Rhyme, rhythm, repetition, alliteration 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Di, viii Subject-verb, capital. 12A Literary texts	13A Generate questions
WEEK 3 The Egyptian Cinderella The Korean Cinderella Yeh-Shen: A Cinderella Story from China The Indian Cinderella	 Fairytale Different Lands, Similar Stories	2Aiii, v, iv, vi, vii Contrast Sounds Phoneme Substitute Phoneme Blend Phoneme Segment	2Bii Decoding words with blends 2Cii Spelling words with blends 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words…	4 Intonation	6E: Make connections 7C, D: Use text evidence, retell texts 8B, D: Main characters, setting 10E: First- and third-person texts	2F Handwriting 11A-E Writing Process 11Di, viii Subject-verb, capital. 12A Literary texts	13A Generate questions
WEEK 4 Jack and the Beanstalk The Goose and the Golden Eggs *From the Bellybutton of the Moon and Other Summer Poems*	 Fairytale Fable Poetry	2Ai, iv, v, vi, vii Rhyme Phoneme Delete Phoneme Blend Phoneme Segment	2Bii Decoding words with blends 2Cii Spelling words with blends 2Bvi, Civ Read/spell high-freq words	1A-E Oral language 3D Identify and use words…	4 Intonation	6E: Make connections 7C, D: Use text evidence, retell texts 9A: Distinguishing characteristics of literature 9B: Rhyme, rhythm, repetition, alliteration 10B: Use of text structure	2F Handwriting 11A-E Writing Process 11Diii Nouns 12A Literary texts	13A Generate questions
WEEK 5 Pied Piper Solomon Grundy *Jujube and Willow*	 Fairytale Nursery Rhyme Fairytale	2Aiii, iv, v, vi, vii Phoneme Categorize Phoneme Delete Phoneme Blend Phoneme Segment	2Bi, iii Decoding closed syllables 2Ci Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words…	4 Phrasing	6E: Make connections 7C, D: Use text evidence, retell texts 9A: Distinguishing characteristics of literature 10B: Use of text structure	2F Handwriting 11A-E Writing Process 11Diii Nouns 12A Literary texts	13A Generate questions
WEEK 6: UNIT 1 REVIEW (AS NEEDED)								

Grade 1 Unit 2

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *Pinocchio* *All the Way to Havana*	Fiction Fiction	2Aiii, v, vii Phoneme Isolate Phoneme Blend Phoneme Segment	2Bi, iii Decoding closed syllables 2Ci Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Phrasing 5 Self-sustained reading	2D: Identify info in different parts of book 6G: Evaluate details to determine importance 7B, D: Write brief comments, retell texts 8C: Plot elements 10B: Use of text structure	2F Handwriting 11A-E Writing Process 11Diii Nouns 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 2 *Pinocchio* The Purple Cow *Sing, Don't Cry*	Fiction Poetry Fiction	2Ai, iii, v, vii Rhyme Phoneme Identity Phoneme Blend Phoneme Segment	2Bii Decoding words with blends 2Cii Spelling words with blends 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Expression 5 Self-sustained reading	2D: Identify info in different parts of book 6G: Evaluate details to determine importance 7B, D: Write brief comments, retell texts 8C: Plot elements 10B: Use of text structure	2F Handwriting 11A-E Writing Process 11Div Adjectives 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 3 *Pinocchio* *Spotted Tail* *Abuela's Weave*	Fiction Biography Fiction	2Aiii, iv, v, vi, vii Phoneme Categorize Phoneme Blend Phoneme Segment Phoneme Substitute	2Bi, iii Decoding closed syllables 2Ci Spelling closed syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine importance 7B, D: Write brief comments, retell texts 8C: Plot elements 10C: Use of print and graphic features	2F Handwriting 11A-E Writing Process 11Div Adjectives 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 4 *Pinocchio* *Spotted Tail* Thanksgiving Day	Fiction Biography Poetry	2Aiii, iv, v, vi, vii Phoneme Isolate Phoneme Categorize Phoneme Delete Phoneme Blend Phoneme Segment	2Bii Decoding words with digraphs 2Cii Spelling words with digraphs 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Phrasing 5 Self-sustained reading	6G: Evaluate details to determine importance 7B, D: Write brief comments, retell texts 9B: Rhyme, rhythm, repetition, alliteration 10C: Use of print and graphic features	2F Handwriting 11A-E Writing Process 11Div Adjectives 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 5 The Dog in the Manger Princess and the Pea *Talking with Mother Earth*	Fable Fairytale Poetry	2Aiv, v, vi, vii Phoneme Segment Phoneme Added Phoneme Blend	2Bii Decoding words with digraphs/trigraphs 2Cii Spelling words with digraphs/ trigraphs 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine importance 7B, D: Write brief comments, retell texts 9A: Distinguishing characteristics of literature 9B: Rhyme, rhythm, repetition, alliteration 10E: First- and third-person texts	2F Handwriting 11A-E Writing Process 11Div Adjectives 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 6: UNIT 2 REVIEW (AS NEEDED)								

Grade 1 Unit 3

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 Rapunzel Table Manners *It's Not Very Complicated*	 Fairytale Poetry Fiction	2Aiii, iv, v, vi, vii Phoneme Identity Phoneme Added Phoneme Substitute Phoneme Blend Phoneme Segment	2Bi, iii Decoding VCe syllables 2Ci, iii Spelling VCe syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 9A: Distinguishing characteristics of literature 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Div Adjectives 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 2 Peter Rabbit *Tía Isla Wants a Car* *Separate is Never Equal*	 Fiction Fiction Autobiography	2Aii, iv, v, vi, vii Alliteration Phoneme Delete Phoneme Blend Phoneme Segment	2Bi, iii Decoding VCe syllables 2Ci, iii Spelling VCe syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Expression 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 9A: Distinguishing characteristics of literature 10E: First- and third-person texts	2F Handwriting 11A-E Writing Process 11Dii Verbs 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 3 *Carmela Full of Wishes* *I Love Saturdays and Domingos*	 Fiction Fiction	2Ai, v, vii Rhyme Phoneme Blend Phoneme Segment	2Bi, iii Decoding VCe syllables 2Ci, iii Spelling VCe syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 9B: Rhyme, rhythm, repetition, alliteration 10B: Use of text structure	2F Handwriting 11A-E Writing Process 11Dii Verbs 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 4 Puss-in-Boots *Dreamers* *Quinito's Neighborhood*	 Fairytale Autobiography Fiction	2Aiii, v, vii Phoneme Isolate Phoneme Blend Phoneme Segment	2Bii Decoding words with blends 2Cii Spelling words with blends 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 8C: Plot elements 10D: How author uses words to visualize	2F Handwriting 11A-E Writing Process 11Dii Verbs 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 5 *From North to South* *Abuelo and the Three Bears*	 Fiction Fairytale	2Aiv, v, vi, vii Phoneme Segment Phoneme Blend Phoneme Delete	2Bi, iii Decoding vowel teams 2Ci, iii Spelling vowel teams 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 8C: Plot elements 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Dii Verbs 12A, C Literary texts, correspondence	13A-E Inquiry and research
WEEK 6: UNIT 3 REVIEW (AS NEEDED)								

Grade 1 Unit 4

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 Rumpelstiltskin The Boy Who Cried Wolf *Juana and Lucas*	Fairytale Fable Fiction	2Ai, iii, v, vii Rhyme Phoneme Categorize Phoneme Blend Phoneme Segment	2Bi, iii Decoding vowel teams 2Ci, iii Spelling vowel teams 2Bvi, Civ Read/spell high-frequency words 2E Alphabetize	1A-E Oral language 3A Use a dictionary: Multiple-meaning words	4 Intonation 5 Self-sustained reading	6H: Synthesize information 7F: Respond using new vocabulary 8A: Topics and theme using text evidence 10C: Use of print and graphic features	2F Handwriting 11A-E Writing Process 11Dvi Prepositions 12B Informational texts	13A-E Inquiry and research
WEEK 2 Sleeping Beauty *The Children's Book of Virtues* *In My Family*	Fairytale Fiction Fiction	2Ai, iii, v, vii Phoneme Identity Phoneme Blend Phoneme Segment Rhyme	2Bi, iii Decoding vowel teams 2Ci, iii Spelling vowel teams 2Bvi, Civ Read/spell high-frequency words 2E Alphabetize	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Expression 5 Self-sustained reading	6H: Synthesize information 7F: Respond using new vocabulary 8A: Topics and theme using text evidence 10D: How author uses words to visualize	2F Handwriting 11A-E Writing Process 11Dvi Prepositions 12B Informational texts	13A-E Inquiry and research
WEEK 3 The Little Hero of Holland Hope *What Can a Citizen Do?*	Fable Poetry Informational	2Aiii, iv, v, vi Phoneme Categorize Phoneme Blend Phoneme Substitute Contrast Sounds	2Bi, iii Decoding vowel teams 2Ci, iii Spelling vowel teams 2Bvi, Civ Read/spell high-frequency words 2E Alphabetize	1A-E Oral language 3A Use a dictionary: Context clues	4 Phrasing 5 Self-sustained reading	6H: Synthesize information 7E: Interact with sources 8A: Topics and theme using text evidence 10D: How author uses words to visualize	2F Handwriting 11A-E Writing Process 11Dvi Prepositions 12B Informational texts	13A-E Inquiry and research
WEEK 4 My Shadow *The Children's Book of Virtues* *One City, One School, Many Foods*	Poetry Fiction Fiction	2Aiii, iv, vi, vii Phoneme Categorize Phoneme Identity Phoneme Segment Phoneme Substitute	2Bi, iii Decoding open/closed syllables 2Ci, iii Spelling open/closed syllables 2Bvi, Civ Read/spell high-frequency words 2E Alphabetize	1A-E Oral language 3C Word parts: Inflectional endings -s, *-ing,* and *-ed*	4 Expression 5 Self-sustained reading	6H: Synthesize information 7C: Use text evidence 9B: Rhyme, rhythm, repetition, alliteration 10C: Use of print and graphic features	2F Handwriting 11A-E Writing Process 11Dv Adverbs 12B Informational texts	13A-E Inquiry and research
WEEK 5 *House at Pooh Corner* *The Children's Book of Virtues* *A Chair for My Mother*	Fiction Fiction Fiction	2Aiii, iv, v, vi Phoneme Categorize Phoneme Delete Phoneme Added Phoneme Blend	2Bi, iii Decoding open/closed syllables 2Ci, iii Spelling open/closed syllables 2Bvi, Civ Read/spell high-frequency words 2E Alphabetize	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Intonation 5 Self-sustained reading	2D: Identify info in different parts of book 6H: Synthesize information 7F: Respond using new vocabulary 8C: Plot elements 10B: Use of text structure	2F Handwriting 11A-E Writing Process 11Dv Adverbs 12B Informational texts	13A-E Inquiry and research
WEEK 6: UNIT 4 REVIEW (AS NEEDED)								

Grade 1 Unit 5

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Composition	Inquiry & Research
WEEK 1 *House at Pooh Corner* Rope Rhyme *Julián is a Mermaid*	Fiction Poetry Fiction	2Aiii, v, vii Contrast Sounds Phoneme Categorize Phoneme Blend Phoneme Segment	2Bi, iii Decoding r-controlled syllables 2Ci, iii Spelling r-controlled syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3A Use a dictionary: Unfamiliar words	4 Expression 5 Self-sustained reading	2D: Identify info in different parts of book 6F: Make inferences 7C: Use text evidence 9B: Rhyme, rhythm, repetition, alliteration 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Dv Adverbs 12B Informational texts	13A-E Inquiry and research
WEEK 2 *House at Pooh Corner* *The Children's Book of Virtues* *A Birthday Basket for Tía*	Fiction Fiction Fiction	2Ai, iv, v, vi Rhyme Phoneme Blend Phoneme Substitute Phoneme Delete	2Bi, iii Decoding r-controlled syllables 2Ci, iii Spelling r-controlled syllables 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3C Word parts: Inflectional endings -s, *-ed,* and *-ing*	4 Intonation 5 Self-sustained reading	2D: Identify info in different parts of book 6F: Make inferences 7C: Use text evidence 8C: Plot elements 10D: How author uses words to visualize	2F Handwriting 11A-E Writing Process 11Dv Adverbs 12B Informational texts	13A-E Inquiry and research
WEEK 3 *House at Pooh Corner* *The Children's Book of Virtues*	Fiction Fiction	2Aiii, iv, v, vi, vii Phoneme Categorize Phoneme Substitute Phoneme Added Phoneme Blend Phoneme Segment	2Bi, iii Decoding diphthongs 2Ci, iii Spelling r-diphthongs 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3A Use a dictionary	4 Phrasing 5 Self-sustained reading	6F: Make inferences 7B: Write brief comments 8C: Plot elements 10E First- and third-person texts	2F Handwriting 11A-E Writing Process 11Dvii,viii Pronouns 12B Informational texts	13A-E Inquiry and research
WEEK 4 Issun Boshi The Knee-High Man *Hija*	Fairytale Fairytale Fiction	2Aiii, iv, v, vi Phoneme Substitute Phoneme Isolate Phoneme Blend Phoneme Substitute	2Bi, iii Decoding diphthongs 2Ci, iii Spelling r-diphthongs 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3C Word parts: Inflectional endings -s, *-ed,* and *-ing*	4 Intonation 5 Self-sustained reading	6F: Make inferences 7C: Use text evidence 9A: Distinguishing characteristics of literature 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Dvii,viii Pronouns 12B Informational texts	13A-E Inquiry and research
WEEK 5 Why the Owl Has Big Eyes The Owl and the Pussycat *Pablo Pineda*	Legend Poetry Fiction	2Aiii, v, vii Phoneme Segment Phoneme Blend Phoneme Categorize	2Bi, iii Decoding vowel teams 2Ci, iii Spelling vowel teams 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Phrasing	6F: Make inferences 7F: Respond using new vocabulary 9B: Rhyme, rhythm, repetition, alliteration 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Dvii,viii Pronouns 12B Informational texts	13A-E Inquiry and research
WEEK 6: UNIT 5 REVIEW (AS NEEDED)								

Grade 1 Unit 6

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 Lon Po Po/ Little Red Riding Hood Washington *Too Many Tamales*	Fairytale Poetry Fiction	2Ai, iii, vi, vii Phoneme Identity Phoneme Segment Phoneme Substitute Rhyme Syllable Delete	2Bi, iii Decoding vowel teams 2Ci, iii Spelling vowel teams 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3A Use a dictionary/ other sources	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7F: Respond using new vocabulary 9B: Rhyme, rhythm, repetition, alliteration 10B: Use of text structure	2F Handwriting 11A-E Writing Process 11Dix Punctuation 12B Informational texts	13A-E Inquiry and research
WEEK 2 The Little Half-Chick The Fox and the Grapes *La luz de Lucía*	Fairytale Fable Fiction	2Aiii, iv, v, vi, vii Phoneme Categorize Phoneme Reversal Phoneme Blend Phoneme Segment Phoneme Substitute	2Bi, iv Decoding compounds and contractions 2Ci Spelling compounds and contractions 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7C: Text evidence 9A: Distinguishing characteristics of literature 10C: Use of print and graphic features	2F Handwriting 11A-E Writing Process 11Dix Punctuation 12B Informational texts	13A-E Inquiry and research
WEEK 3 All Stories Are Anansi's *Grandma's Gift* *The Name Jar*	Folktale Autobiography Fiction	2Aiii, iv, vi, vii Phoneme Categorize Phoneme Segment Phoneme Substitute	2Bi, iv Decoding compounds and contractions 2Ci Spelling compounds and contractions 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3A Use a dictionary: Antonyms	4 Intonation 5 Self-sustained reading	2D: Identify info in different parts of book 6I: Monitor comprehension and make adjustments 7E: Interact with sources 8A: Topics and theme using text evidence 10E: First- and third-person texts	2F Handwriting 11A-E Writing Process 11Dix Punctuation 12B Informational texts	13A-E Inquiry and research
WEEK 4 The Crowded Noisy House The Maid and the Milk Pail *One Crazy Summer*	Folktale Fable Fiction	2Aiv, v, vi, vii Syllable Added Phoneme Segment Phoneme Blend Phoneme Substitute	2Bi, v Decoding words with inflectional endings 2Ci Spelling words with inflectional endings 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3C Word parts Inflectional endings -s, *-ed,* and *-ing*	4 Phrasing 5 Self-sustained reading	2D: Identify info in different parts of book 6I: Monitor comprehension and make adjustments 7A: Personal connections 8A: Topics and theme using text evidence 10A: Author's purpose	2F Handwriting 11A-E Writing Process 11Dix Punctuation 12B Informational texts	13A-E Inquiry and research
WEEK 5 Wynken, Blynken, and Nod *One Crazy Summer*	Poetry Fiction	2Aiv, v, vi, vii Phoneme Reversal Phoneme Blend Phoneme Delete Phoneme Added Syllable Delete Syllable Added	2Bi, v Decoding words with inflectional endings 2Ci Spelling words with inflectional endings 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3D Identify and use words… 3B Clarify word meanings	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7B: Write brief comments 9B: Rhyme, rhythm, repetition, alliteration 10D: How author uses words to visualize	2F Handwriting 11A-E Writing Process 11Dix Punctuation 12B Informational texts	13A-E Inquiry and research
WEEK 6: UNIT 6 REVIEW (AS NEEDED)								

ADDITIONAL NOTES

- The following expectations will be embedded within various reading, writing, and other activities as described below:
  - 1A Listen actively, ask relevant questions to clarify information, and answer questions using multiword responses.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Teacher-led small group lessons
  - 1B Follow, restate, and give oral directions that involve a short, related sequence of actions.
    - Cooperative literacy centers
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Transitioning into different activities or lessons
    - Following rules and procedures throughout the day (e.g., turning in work, moving from one location to the next)
  - 1C Share information and ideas about the topic under discussion, speaking clearly at an appropriate pace and using the conventions of language.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Teacher-led small group lessons
  - 1D Work collaboratively with others by following agreed-upon rules for discussion, including listening to others, speaking when recognized, and making appropriate contributions.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
  - 1E Develop social communication such as introducing himself/herself and others, relating experiences to a classmate, and expressing needs and feelings.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Conducting presentations in class

- Informational texts in science and history/geography will be aligned with the units outlined in this scope and sequence to have students meet the following expectations:
  - 9D Recognize characteristics and structures of informational text, including:
    - 9Di The central idea and supporting evidence with adult assistance;
    - 9Dii Features and simple graphics to locate or gain information; and
    - 9Diii Organizational patterns such as chronological order and description with adult assistance;
  - 9F Recognize characteristics of multimodal and digital texts.

- Note: HCA will address the following two TEKS during Year 0 to ensure complete alignment with the TEKS in Year 1:
  - 9C discuss elements of **drama** such as characters and setting;
  - 9E Recognize characteristics of **persuasive** text with adult assistance and state what the author is trying to persuade the reader to think or do; and

Heritage Classical Academy Grade 2 ELAR
Scope and Sequence

1st 3 weeks: Foundational literacy skills (Review of Grade 1 Skills)

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 Beauty and the Beast *Book Fiesta!*	Fairytale Fiction	2Ai, ii Rhyming Distinguishing long/ short vowels	2Bi Decode short vowels 2Biii, Ci Read/Spell closed syllables 2Bvii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of synonyms	2B Build Fluency: Sound/Spellings	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Main characters, distinguishing characteristics of literature 10A: Author's purpose	2E Handwriting 11A-E Writing Process 11Di Complete sentences 11Dx End punct. 12A Personal narratives	13A Generate questions
WEEK 2 The Emperor's New Clothes Bed in Summer	Folktale Poetry	2Ai, ii Rhyming Distinguishing long/ short vowels	2Bi Decode short vowels and blends 2Biii, Ci Read/Spell closed syllables 2Bvii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of synonyms	2B Build Fluency: Sound/Spellings	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Main characters, distinguishing characteristics of literature 10D: Use of descriptive, literal, figurative language	2E Handwriting 11A-E Writing Process 11Di Complete sentences 11Dx End punct. 12A Personal narratives	13A Generate questions
WEEK 3 *Talk* *Marianthe's Story: Painted Words, Spoken Memories*	Fiction Fiction	2Ai, ii Rhyming Distinguishing long/ short vowels	2Bi Decoding short vowels, blends, trigraphs 2Biii, Ci Read/Spell closed syllables 2Bvii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of synonyms	2B Build Fluency: Sound/Spellings	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Main characters, distinguishing characteristics of literature 10A: Author's purpose	2E Handwriting 11A-E Writing Process 11Di Complete sentences 11Dx End punct. 12A Personal narratives	13A Generate questions

*See the last page for an explanation of how the Oral Language expectations will be embedded across classrooms.

Grade 2 Unit 1

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 The Fisherman and his Wife The Blind Men and the Elephant	Folktale Poetry	2Ai, ii, iii Rhyming Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode long vowels 2Biii, Ci Read/spell VCe syllables and vowel teams 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3D Identify, use, and explain meaning of antonyms	4 Phrasing 5 Self-sustained reading	6D: Create mental images 7C: Use text evidence 8B, D: Main characters, setting 9B: Visual patterns and structures in poetry 10D: Use of descriptive, literal, figurative language	2E Handwriting 11A-E Writing Process 11Di Complete sentences 11Dx End punct. 12A Personal narratives	13A Generate questions
WEEK 2 The Magic Paintbrush Hurt No Living Thing *Doña Flor*	Fiction Poetry Tall tale	2Ai, ii, iii Rhyming Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode long vowels 2Biii, Ci Read/spell VCe syllables and vowel teams 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3D Identify, use, and explain meaning of antonyms	4 Phrasing 5 Self-sustained reading	6D: Create mental images 7C: Use text evidence 8B, D: Main characters, setting 9B: Visual patterns and structures in poetry 10A: Author's purpose	2E Handwriting 11A-E Writing Process 11Di Complete sentences 11Dx End punct. 12A Personal narratives	13B Develop and follow a research plan
WEEK 3 How Iktomi Lost His Eyes The Tongue-Cut Sparrow *My Name is Celia*	Fiction Fable Biography	2Ai, ii, iii Rhyming Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode long vowels 2Biii, Ci Read/spell VCe syllables and vowel teams 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3D Identify, use, and explain meaning of antonyms	4 Attend to punctuation 5 Self-sustained reading	6E: Make connections 7C, D: Use text evidence, retell and paraphrase texts 8B, D: Main characters, setting 10E: First- and third-person texts	2E Handwriting 11A-E Writing Process 11Diii Nouns 11Dx End punct. 12A Personal narratives	13B Develop and follow a research plan
WEEK 4 How the Camel Got His Hump The Tiger, the Brahman, and the Jackal	Fable Fairytale	2Aii, iii Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode long vowels 2Biii, Ci Read/spell VCe syllables and vowel teams 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3B Use context to determine meaning	4 Intonation 5 Self-sustained reading	6E: Make connections 7C, D: Use text evidence, retell and paraphrase texts 9A: Distinguishing characteristics of literature 10B: Use of text structure	2E Handwriting 11A-E Writing Process 11Diii Nouns 11Dix Capitalize days of the week 12A Personal narratives	13B Develop and follow a research plan
WEEK 5 *El Pajaro Cu* *Tomás and the Library Lady* Bee! I'm Expecting You!	Fiction Fiction Poetry	2Aii, iii Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode long vowels 2Biii, Ci Read/spell VCe syllables and vowel teams 2Bvii Read high-frequency words 2Civ Spell multisyllabic words 2Bvi, Civ Read/spell high-frequency words	1A-E Oral language 3B Use context to determine meaning	4 Attend to punctuation 5 Self-sustained reading	6E: Make connections 7C, D: Use text evidence, retell and paraphrase texts 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10B: Use of text structure	2E Handwriting 11A-E Writing Process 11Diii Nouns 11Dix Capitalize days of the week 12A Personal narratives	13B Develop and follow a research plan
WEEK 6: UNIT 1 REVIEW (AS NEEDED)								

Grade 2 Unit 2

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *Charlotte's Web* Buffalo Dusk	Fiction Poetry	2Aii, iii Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bii Decode/spell silent letters 2Biii, Ci Read/spell VCe syllables and vowel teams 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3B Use context to determine meaning	4 Phrasing 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write brief comments, retell and paraphrase texts 8C: Plot elements 9B: Visual patterns and structures in poetry 10B: Use of text structure	2E Handwriting 11A-E Writing Process 11Dii Verbs 11Dix Capitalize days of the week 12A, C Poetry, thank you notes	13C-E Inquiry and research
WEEK 2 *Charlotte's Web* Caterpillars	Fiction Poetry	2Aii, iii Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bii Decode/spell silent letters 2Biii, Ci Read/spell VCe syllables and vowel teams 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write brief comments, retell and paraphrase texts 8C: Plot elements 9B: Visual patterns and structures in poetry 10B: Use of text structure	2E Handwriting 11A-E Writing Process 11Dii Verbs 11Dix, x Capitalize months; Commas in dates 12A, C Poetry, thank you notes	13C-E Inquiry and research
WEEK 3 *Charlotte's Web* *The Cazuela that the Farm Maiden Stirred*	Fiction Fiction	2Aii, iii Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode/spell variant vowels 2Biii, Ci Read/spell diphthongs 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write brief comments, retell and paraphrase texts 8C: Plot elements 10C: Use of print and graphic features	2E Handwriting 11A-E Writing Process 11Dii Verbs 11Dix, x Capitalize months; Commas in dates 12A, C Poetry, thank you notes	13C-E Inquiry and research
WEEK 4 *Mythology of Ancient Greece* *Drum Dream Girl* Harriet Tubman	Myths Biography Poetry	2Aii, iii Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode/spell variant vowels 2Biii, Ci Read/spell diphthongs 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Attend to punctuation 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write brief comments, retell and paraphrase texts 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10C: Use of print and graphic features	2E Handwriting 11A-E Writing Process 11Div Adjectives 11Dix, x Capitalize months; Commas in dates 12A, C Poetry, thank you notes	13C-E Inquiry and research
WEEK 5 *Mythology of Ancient Greece* Lincoln	Myths Poetry	2Aii, iii Distinguishing long/ short vowels Adding, changing, removing phonemes	2Bi Decode/spell variant vowels 2Biii, Ci Read/spell diphthongs 2Bvii Read high-frequency words 2Civ Spell multisyllabic words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write brief comments, retell and paraphrase texts 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10E: First- and third-person texts	2E Handwriting 11A-E Writing Process 11Div Adjectives 11Dix, x Capitalize months; Commas in dates 12A, C Poetry, thank you notes	13C-E Inquiry and research
WEEK 6: UNIT 2 REVIEW (AS NEEDED)								

Grade 2 Unit 3

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *Mythology of Ancient Greece* Smart *Dancing Hands*	Myths Poetry Biography	2Aii, iii, iv Distinguishing long/ short vowels Adding, changing, removing phonemes Manipulating phonemes	2Biii, Ci Read/spell r-controlled syllables 2Biv, Ciii Decode/ spell compound words 2Civ Spell multisyllabic words	1A-E Oral language 3D Identify, use explain meaning of idioms	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10A: Author's purpose	2E Handwriting 11A-E Writing Process 11Div Adjectives 11Dix Capitalize letter's salutation and conclusion 12A, C Literary texts, letters	13C-E Inquiry and research
WEEK 2 *Mythology of Ancient Greece* Who Has Seen the Wind?	Myths Poetry	2Aii, iii, iv Distinguishing long/ short vowels Adding, changing, removing phonemes Manipulating phonemes	2Biii, Ci Read/spell r-controlled syllables 2Biv, Ciii Decode/ spell compound words 2Civ Spell multisyllabic words	1A-E Oral language 3D Identify, use explain meaning of idioms	4 Expression 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10E: First- and third-person texts	2E Handwriting 11A-E Writing Process 11Dvii Pronouns 11Dix Capitalize letter's salutation and conclusion 12A, C Literary texts, letters	13C-E Inquiry and research
WEEK 3 *Mythology of Ancient Greece* *My Name is Gabito*	Myths Biography	2Aii, iii, iv Distinguishing long/ short vowels Adding, changing, removing phonemes Manipulating phonemes	2Biii, Ci Read/spell r-controlled syllables 2Biv, Ciii Decode/ spell contractions 2Civ Spell multisyllabic words	1A-E Oral language 3D Identify, use explain meaning of idioms	4 Attend to punctuation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 8A: Discuss topics and determine theme 10B: Use of text structure	2E Handwriting 11A-E Writing Process 11Dvii Pronouns 11Dx Apostrophes in contractions 12A, C Literary texts, letters	13C-E Inquiry and research
WEEK 4 *Mythology of Ancient Greece* A Christmas Carol The Night Before Christmas	Myths Fiction Poetry	2Aii, iii, iv Distinguishing long/ short vowels Adding, changing, removing phonemes Manipulating phonemes	2Biii, Ci Read/spell open syllables 2Biv, Ciii Decode/ spell contractions 2Civ Spell multisyllabic words	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 8C: Plot elements 9B: Visual patterns and structures in poetry 10D: Use of descriptive, literal, figurative language	2E Handwriting 11A-E Writing Process 11Dvii Pronouns 11Dx Apostrophes in contractions 11Dix Capitalize letter's salutation and conclusion 12A, C Literary texts, letters	13C-E Inquiry and research
WEEK 5 *Mythology of Ancient Greece* Rudolph is Tired of the City	Myths Poetry	2Aii, iii, iv Distinguishing long/ short vowels Adding, changing, removing phonemes Manipulating phonemes	2Biii, Ci Read/spell open syllables and final stable syllables 2Biv, Ciii Decode/ spell contractions 2Civ Spell multisyllabi words	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 8A: Discuss topics and determine theme 9B: Visual patterns and structures in poetry 10A: Author's purpose	2E Handwriting 11A-E Writing Process 11Dvi Prepositions 11Dx Apostrophes in contractions 12A, C Literary texts, letters	13C-E Inquiry and research
WEEK 6: UNIT 3 REVIEW (AS NEEDED)								

Grade 2 Unit 4

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *Mythology of Ancient Greece* *Bravo! Poems about Amazing Hispanics*	Myths Poetry	2Aiii, iv Adding, changing, removing phonemes Manipulating phonemes	2Biii, Ci Read/spell open syllables and final stable syllables 2Biv, Ciii Decode/spell contractions 2Civ Spell multisyllabic words 2D Alphabetize	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Attend to punctuation 5 Self-sustained reading	6H: Synthesize information 7F: Respond using new vocabulary 8A: Discuss topics and determine theme 9B: Visual patterns and structures in poetry 10C: Use of print and graphic features 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dvi Prepositions 11Dx Apostrophes in contractions 12B Procedural texts	13C-E Inquiry and research
WEEK 2 *Mythology of Ancient Greece* *Bravo! Poems about Amazing Hispanics*	Myths Poetry	2Aiii, iv Adding, changing, removing phonemes Manipulating phonemes	2Biii, Ci Read/spell open syllables and final stable syllables 2Biv, Ciii Decode/spell contractions 2Civ Spell multisyllabic words 2D Alphabetize	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Expression 5 Self-sustained reading	6H: Synthesize information 7F: Respond using new vocabulary 8A: Discuss topics and determine theme 9B: Visual patterns and structures in poetry 10D: Use of descriptive, literal, figurative language 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dvi Prepositions 11Dx Apostrophes in contractions 12B Procedural texts	13C-E Inquiry and research
WEEK 3 *Mythology of Ancient Greece* *Bravo! Poems about Amazing Hispanics*	Myths Poetry	2Aiii, iv Adding, changing, removing phonemes Manipulating phonemes	2Biv, Ciii Decode/spell contractions 2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2D Alphabetize	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6H: Synthesize information 7E: Interact with sources 8A: Discuss topics and determine theme 9B: Visual patterns and structures in poetry 10D: Use of descriptive, literal, figurative language 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dvi Prepositions 11Dx Apostrophes in contractions 12B Procedural texts	13C-E Inquiry and research
WEEK 4 *Peter Pan* Something Told the Wild Geese	Fiction Poetry	2Aiii, iv Adding, changing, removing phonemes Manipulating phonemes	2Biv, Ciii Decode/spell common abbreviations 2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2D Alphabetize and use dictionary/glossary	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Expression 5 Self-sustained reading	6H: Synthesize information 7C: Use text evidence 9B: Visual patterns and structures in poetry 10C: Use of print and graphic features	2E Handwriting 11A-E Writing Process 11Dv Adverbs 12B Procedural texts	13C-E Inquiry and research
WEEK 5 *Peter Pan* Windy Nights *A Library for Juana*	Fiction Poetry Biography	2Aiii, iv Adding, changing, removing phonemes Manipulating phonemes	2Biv, Ciii Decode/spell common abbreviations 2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Intonation 5 Self-sustained reading	6H: Synthesize information 7F: Respond using new vocabulary 8C: Plot elements 9B: Visual patterns and structures in poetry 10B: Use of text structure	2E Handwriting 11A-E Writing Process 11Dv Adverbs 12B Procedural texts	13C-E Inquiry and research
WEEK 6: UNIT 4 REVIEW (AS NEEDED)								

Grade 2 Unit 5

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Composition	Inquiry & Research
WEEK 1 *Peter Pan* Seashell *Amazing Grace*	Fiction Poetry Fiction	2Aiv Manipulatin phonemes	2Biii, Ci Decode/spell final stable syllables 2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3A Use resources to determine meaning and pronunciation	4 Expression 5 Self-sustained reading	6F: Make inferences 7C: Use text evidence 9B: Visual patterns and structures in poetry 10A: Author's purpose	2E Handwriting 11A-E Writing Process 11Dv Adverbs 12B Informational texts	13A-G Inquiry and research
WEEK 2 *Peter Pan* *Beautiful Moon* There was an Old Man with a Beard	Fiction Fiction Poetry	2Aiv Manipulatin phonemes	2Biii, Ci Decode/spell final stable syllables 2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3A Use resources to determine meaning and pronunciation	4 Intonation 5 Self-sustained reading	6F: Make inferences 7C: Use text evidence 8C: Plot elements 9B: Visual patterns and structures in poetry 10D: Use of descriptive, literal, figurative language	2E Handwriting 11A-E Writing Process 11Dviii Compound subjects 11Dx Commas in series 12B Informational texts	13A-G Inquiry and research
WEEK 3 *The Sign of the Beaver* *Brothers and Sisters: Family Poems*	Fiction Poetry	2Aiv Manipulatin phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with infl. endings 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3A Use resources to determine meaning and pronunciation	4 Phrasing 5 Self-sustained reading	6F: Make inferences 7B: Write brief comments 8A: Discuss topics and determine theme 9B: Visual patterns and structures in poetry 10E First- and third-person texts 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dviii Compound subjects 11Dx Commas in series 12B Informational texts	13A-G Inquiry and research
WEEK 4 *The Sign of the Beaver* *Brothers and Sisters: Family Poems*	Fiction Poetry	2Aiv Manipulatin phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with infl. endings 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3A Use resources to determine meaning and pronunciation	4 Attend to punctuation 5 Self-sustained reading	6F: Make inferences 7C: Use text evidence 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10A: Author's purpose 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dviii Compound predicates 11Dx Commas in series 12B Informational texts	13A-G Inquiry and research
WEEK 5 *The Sign of the Beaver* *Brothers and Sisters: Family Poems*	Fiction Poetry	2Aiv Manipulatin phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with infl. endings 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3A Use resources to determine meaning and pronunciation	4 Phrasing	6F: Make inferences 7F: Respond using new vocabulary 8A: Discuss topics and determine theme 9B: Visual patterns and structures in poetry 10A: Author's purpose 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dviii Compound predicates 11Dx Commas in series 12B Informational texts	13A-G Inquiry and research
WEEK 6: UNIT 5 REVIEW (AS NEEDED)								

Grade 2 Unit 6

Literature Selection	Genre	Phon. Awareness	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *The Sign of the Beaver* *Thanks a Million*	Fiction Fiction	2Aiv Manipulating phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with infl. endings 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7F: Respond using new vocabulary 8A: Discuss topics and determine theme 10B: Use of text structure	2E Handwriting 11A-E Writing Process 11Dviii Compound subjects and predicates 11Dxi Correct spelling 12B Reports	13A-G Inquiry and research
WEEK 2 Paul Bunyan *Magic Trash* *Those Shoes*	Tall tale Fiction Fiction	2Aiv Manipulating phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with prefixes 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7C: Text evidence 9A: Distinguishing characteristics of literature 10C: Use of print and graphic features	2E Handwriting 11A-E Writing Process 11Dviii Compound subjects and predicates 11Dxi Correct spelling 12B Reports	13A-G Inquiry and research
WEEK 3 Johnny Appleseed *Mango, Abuela, and Me* *Laughing Tomatoes and Other Spring Poems*	Tall tale Fiction Poetry	2Aiv Manipulating phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with prefixes 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Attend to punctuation 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7E: Interact with sources 8A: Discuss topics and determine theme 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dviii Compound subjects and predicates 11Dxi Correct spelling 12B Reports	13A-G Inquiry and research
WEEK 4 John Henry *Freedom Summer* *Laughing Tomatoes and Other Spring Poems*	Tall tale Fiction Poetry	2Aiv Manipulating phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with prefixes 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7A: Personal connections 8A: Discuss topics and determine theme 9A: Distinguishing characteristics of literature 9B: Visual patterns and structures in poetry 10F: Identify/explain use of repetition	2E Handwriting 11A-E Writing Process 11Dx End punctuation 11Dxi Correct spelling 12B Reports	13A-G Inquiry and research
WEEK 5 Pecos Bill *My Papi Has a Motorcycle*	Tall tale Fiction	2Aiv Manipulating phonemes	2Bv, Cv Decode/spell syllable division patterns 2Civ Spell multisyllabic words 2Bvi, Cvi Decode/spell words with prefixes 2D Alphabetize & use dictionary/glossary	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Expression 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7B: Write brief comments 8A: Discuss topics and determine theme 10D: Use of descriptive, literal, figurative language	2E Handwriting 11A-E Writing Process 11Dx End punctuation 11Dxi Correct spelling 12B Reports	13A-G Inquiry and research
WEEK 6: UNIT 6 REVIEW (AS NEEDED)								

ADDITIONAL NOTES

- The following expectations will be embedded within various reading, writing, and other activities as described below:
  - 1A Listen actively, ask relevant questions to clarify information, and answer questions using multiword responses.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Teacher-led small group lessons
  - 1B Follow, restate, and give oral directions that involve a short, related sequence of actions.
    - Cooperative literacy centers
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Transitioning into different activities or lessons
    - Following rules and procedures throughout the day (e.g., turning in work, moving from one location to the next)
  - 1C Share information and ideas that focus on the topic under discussion, speaking clearly at an appropriate pace and using the conventions of language.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Teacher-led small group lessons
  - 1D Work collaboratively with others by following agreed-upon rules for discussion, including listening to others, speaking when recognized, making appropriate contributions, and building on the ideas of others.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
  - 1E Develop social communication such as distinguishing between asking and telling.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Conducting presentations in class

- Informational texts in science and history/geography will be aligned with the units outlined in this scope and sequence to have students meet the following expectations:
  - 9D Recognize characteristics and structures of informational text, including:
    - 9Di The central idea and supporting evidence with adult assistance;
    - 9Dii Features and simple graphics to locate or gain information; and
    - 9Diii Organizational patterns such as chronological order and cause and effect stated explicitly.
  - 9F Recognize characteristics of multimodal and digital texts.

- Note: HCA will address the following two TEKS in Year 0 so that the ELAR curriculum is fully aligned with the TEKS in Year 1.
  - 9C discuss elements of **drama** such as characters, dialogue, and setting;
  - 9E Recognize characteristics of **persuasive** text including:
    - 9Ei Stating what the author is trying to persuade the reader to think or do; and
    - 9Eii Distinguishing facts from opinion.

Heritage Classical Academy Grade 3 ELAR
Scope and Sequence

1st 3 weeks: Foundational literacy skills (Review of Grade 2 Skills)

Literature Selection	Genre	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *Waiting for the Biblioburro* By Myself	Fiction Poetry	2Aii, Bi Read/Spell closed syllables 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of synonyms	4 Phrasing 5 Self-sustained reading	6A, C: Establish purpose, predictions 7A: Personal connections 9B: Rhyme scheme, sound devices, structural elements in poems 10A: Author's purpose and message	2D Handwriting 11A-E Writing Process 11Di Complete simple sentences 11Diii Nouns 11Dix Capitalization of people's titles 12B Informational texts	13A Generate questions
WEEK 2 Aladdin and the Wonderful Lamp *The Secret of Footprints*	Folktale Fiction	2Aii, Bi Read/Spell closed syllables 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of synonyms	4 Expression 5 Self-sustained reading	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Major/minor characters, distinguishing characteristics of literature 10D: Describe how use of descriptive, literal, figurative language achieves purpose	2D Handwriting 11A-E Writing Process 11Di Complete simple sentences 11Diii Nouns 11Dix Capitalization of people's titles 12B Informational texts	13A Generate questions
WEEK 3 Ali Baba and the Forty Thieves *Just Ask!*	Folktale Informational	2Aii, Bi Read/Spell closed syllables 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of synonyms	4 Attend to punctuation 5 Self-sustained reading	6A, C: Establish purpose, predictions 7A: Personal connections 8B, 9A: Major/minor characters, distinguishing characteristics of literature 10A: Author's purpose and message	2D Handwriting 11A-E Writing Process 11Di Complete simple sentences 11Diii Nouns 11Dix Capitalization of people's titles 12B Informational texts	13A Generate questions

*See the last page for an explanation of how the Oral Language expectations will be embedded across classrooms.

Grade 3 Unit 1

Literature Selection	Genre	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 The Hunting of the Great Bear *A Movie in My Pillows: Poems*	Folktale Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell VCe and vowel team syllables 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of antonyms	4 Phrasing 5 Self-sustained reading	6D: Create mental images 7C: Use text evidence 8B, D: Major/minor characters, setting 9B: Rhyme scheme, sound devices, structural elements in poems 10D: Describe how use of descriptive, literal, figurative language achieves purpose	2D Handwriting 11A-E Writing Process 11Di Complete simple sentences 11Diii Nouns 11Dix Capitalization of people's titles 12B Informational texts	13B Develop and follow a research plan
WEEK 2 Adventures of Isabel *A Movie in My Pillows: Poems*	Poetry Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell VCe and vowel team syllables 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of antonyms	4 Phrasing 5 Self-sustained reading	6D: Create mental images 6I: Monitor comprehension and make adjustments 7C: Use text evidence 7G: Discuss ideas in text important to meaning 9B: Rhyme scheme, sound devices, structural elements in poems 10A: Author's purpose 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Di Complete simple sentences 11Div Verbs 11Dix Capitalization of holidays 12B Informational texts	13B Develop and follow a research plan
WEEK 3 The Husband Who Was to Mind the House *A Movie in My Pillows: Poems*	Fairytale Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell VCe and vowel team syllables 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use, and explain meaning of antonyms	4 Attend to punctuation 5 Self-sustained reading	6E: Make connections 6I: Monitor comprehension and make adjustments 7C, D: Use text evidence, retell and paraphrase texts 8B, D: Major/minor characters, setting 10E: Use of literary devices, e.g., first- and third-person texts	2D Handwriting 11A-E Writing Process 11Div Verbs 11Dix Capitalization of holidays 12B Informational texts	13B Develop and follow a research plan
WEEK 4 The Little Match Girl *Alma and How She Got Her Name*	Fairytale Fiction	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell VCe and vowel team syllables 2Avii Read high-frequency words	1A-E Oral language 3B Use context to determine meaning	4 Intonation 5 Self-sustained reading	6E: Make connections 7C, D: Use text evidence, retell and paraphrase texts 7G: Discuss ideas in text important to meaning 9A: Distinguishing characteristics of literature 10B: Use of text structure 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Div Verbs 11Dv Adverbs 11Dix Capitalization of places 12A Personal narratives	13B Develop and follow a research plan
WEEK 5 *Islandborn* *Martii's Song for Freedom* The Bee	Fiction Poetry Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell VCe and vowel team syllables 2Avii Read high-frequency words	1A-E Oral language 3B Use context to determine meaning	4 Attend to punctuation 5 Self-sustained reading	6E: Make connections 7C, D: Use text evidence, retell and paraphrase texts 9A: Distinguishing characteristics of literature 9B: Rhyme scheme, sound devices, structural elements in poems 10B: Use of text structure	2D Handwriting 11A-E Writing Process 11Div Verbs 11Dv Adverbs 11Dix Capitalization of places 12A Personal narratives	13B Develop and follow a research plan
WEEK 6: UNIT 1 REVIEW (AS NEEDED)							

Grade 3 Unit 2

Literature Selection	Genre	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *Black Beauty* By Myself	Fiction Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell diphthongs 2Avii Read high-frequency words	1A-E Oral language 3B Use context to determine meaning	4 Phrasing 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write a response to a text, retell and paraphrase texts 8C: Plot elements 9B: Rhyme scheme, sound devices, structural elements in poems 10B: Use of text structure 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Dii Verbs 11Dv Adverbs 11Dix Capitalization of places 12A Personal narratives	13C-E Inquiry and research
WEEK 2 *Black Beauty* Catch a Little Rhyme *The Day of the Dead*	Fiction Poetry Fiction	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell diphthongs 2Aiii, Biii Read/Spell compound words 2Avii Read high-frequency words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write a response to a text, retell and paraphrase texts 7G: Discuss ideas in text important to meaning 8C: Plot elements 9B: Rhyme scheme, sound devices, structural elements in poems 10B: Use of text structure	2D Handwriting 11A-E Writing Process 11Dv Adverbs 11Dix Capitalization of places 12A Personal narratives	13C-E Inquiry and research
WEEK 3 *Black Beauty* *Yes! We Are Latinos*	Fiction Poetry/ Fiction	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell r-controlled syllables 2Aiii, Biii Read/Spell compound words 2Avii Read high-frequency words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write a response to a text, retell and paraphrase texts 8C: Plot elements 9B: Rhyme scheme, sound devices, structural elements in poems 10C: Use of print and graphic features 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Dv Adverbs 11Dix Capitalization of places 12A Personal narratives	13C-E Inquiry and research
WEEK 4 *The People Could Fly* *Yes! We Are Latinos*	Folktales Poetry/ Fiction	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell r-controlled syllables 2Aiii, Biii Read/Spell contractions 2Avii Read high-frequency words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Attend to punctuation 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write a response to a text, retell and paraphrase texts 9A: Distinguishing characteristics of literature 9B: Rhyme scheme, sound devices, structural elements in poems 10C: Use of print and graphic features	2D Handwriting 11A-E Writing Process 11Div Adjectives 11Dx Apostrophes in contractions 12C Argumentative texts	13C-E Inquiry and research
WEEK 5 *The People Could Fly* *Frida Kahlo: The Artist Who Painted Herself* Knoxville, Tennessee	Folktales Biography Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell r-controlled syllables 2Aiii, Biii Read/Spell contractions 2Avii Read high-frequency words	1A-E Oral language 3B Use context to determine meaning 3D Identify, use, explain meaning of homographs	4 Expression 5 Self-sustained reading	6G: Evaluate details to determine key ideas 7B, D: Write a response to a text, retell and paraphrase texts 7G: Discuss ideas in text important to meaning 9A: Distinguishing characteristics of literature 9B: Rhyme scheme, sound devices, structural elements in poems 10E: Use of literary devices, e.g., first- and third-person texts	2D Handwriting 11A-E Writing Process 11Div Adjectives 11Dx Apostrophes in contractions 12C Argumentative texts	13C-E Inquiry and research
WEEK 6: UNIT 2 REVIEW (AS NEEDED)							

Grade 3 Unit 3

Literature Selection	Genre	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *The People Could Fly* Three Words of Wisdom	Folktales Fiction	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell final stable syllables 2Aiii, Biii Read/Spell contractions 2Avii Read high-freq. words	1A-E Oral language 3D Identify, use explain meaning of idioms	4 Intonation 5 Self-sustained reading	6B: Generate questions 6F: Make inferences and use evidence 6I: Monitor comprehension and make adjustments 7E: Interact with sources 8A: Infer theme/distinguish it from topic 9A: Distinguishing characteristics of literature 10A: Author's purpose	2D Handwriting 11A-E Writing Process 11Div Adjectives 11Dx Apostrophes in contractions 12C Argumentative texts	13C-E Inquiry and research
WEEK 2 *The People Could Fly* Dream Variations	Folktales Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell final stable syllables 2Bii Spell homophones 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use explain meaning of homophones	4 Expression 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 9A: Distinguishing characteristics of literature 9B: Rhyme scheme, sound devices, structural elements in poems 10E: Use of literary devices, e.g., first- and third-person texts 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Div Adjectives 11Dvii Pronouns 11Dx Apostrophes in possessives 12C Argumentative texts	13C-E Inquiry and research
WEEK 3 *The Princess and the Goblin* First Thanksgiving for All	Fiction Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell final stable syllables 2Bii Spell homophones 2Avii Read high-frequency words	1A-E Oral language 3D Identify, use explain meaning of homophones	4 Attend to punctuation 5 Self-sustained reading	6B: Generate questions 6F: Make inferences and use evidence 7E: Interact with sources 8A: Infer theme/distinguish it from topic 9B: Rhyme scheme, sound devices, structural elements in poems 10B: Use of text structure 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Dvii Pronouns 11Dx Apostrophes in possessives 12C Argumentative texts	13C-E Inquiry and research
WEEK 4 *The Princess and the Goblin* *My Mexico*	Fiction Poetry	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell final stable syllables 2Bii Spell homophones 2Avii Read high-freq. words	1A-E Oral language 3C Identify meaning of and use words with affixes 3D Identify, use explain meaning of homophones	4 Intonation 5 Self-sustained reading	6B: Generate questions 7E: Interact with sources 8C: Plot elements 9B: Rhyme scheme, sound devices, structural elements in poems 10D: Describe how use of descriptive, literal, figurative language achieves purpose	2D Handwriting 11A-E Writing Process 11Dvii Pronouns 11Dx Apostrophes in possessives 12D Thank you notes	13C-E Inquiry and research
WEEK 5 *The Princess and the Goblin* *Under the Lemon Moon*	Fiction Fiction	2Ai, Biv Decode/Spell multiple sound-spelling patterns 2Aii, Bi Read/Spell final stable syllables 2Bii Spell homophones 2Avii Read high-frequency words	1A-E Oral language 3C Identify meaning of and use words with affixes 3D Identify, use explain meaning of homophones	4 Intonation 5 Self-sustained reading	6B: Generate questions 6F: Make inferences and use evidence 7B, D: Write a response to a text, retell and paraphrase texts 7E: Interact with sources 7G: Discuss ideas in text important to meaning 8A: Infer theme/distinguish it from topic 10A: Author's purpose 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Dvii Pronouns 11Dx Apostrophes in possessives 12D Thank you notes	13C-E Inquiry and research
WEEK 6: UNIT 3 REVIEW (AS NEEDED)							

Grade 3 Unit 4

Literature Selection	Genre	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *D'Aulaires Book of Norse Myths* *Portraits of Hispanic American Heroes*	Myths Biographies	2Aii, Bi Read/Spell open syllables 2Aiv, Bv Decode/Spell words using syllable division patterns 2Avii Read high-frequency words	1A-E Oral language 3C Identify meaning of and use words with affixes 3D Identify, use explain meaning of idioms	4 Attend to punctuation 5 Self-sustained reading	6H: Synthesize information 6I: Monitor comprehension and make adjustments 7B, D: Write a response to a text, retell and paraphrase texts 7F: Respond using new vocabulary 8A: Infer theme/distinguish it from topic 10C: Use of print and graphic features 10F: Author's use of language contributing to voice	2D Handwriting 11A-E Writing Process 11Di Compound sentences 11Dvii Pronouns 11Dx Commas in compound sentences 12D Letters	13C-E Inquiry and research
WEEK 2 *D'Aulaires Book of Norse Myths* *Portraits of Hispanic American Heroes*	Myths Biographies	2Aii, Bi Read/Spell open syllables 2Aiv, Bv Decode/Spell words using syllable division patterns 2Avii Read high-frequency words	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Expression 5 Self-sustained reading	6H: Synthesize information 7F: Respond using new vocabulary 7G: Discuss ideas in text important to meaning 8A: Infer theme/distinguish it from topic 10D: Describe how use of descriptive, literal, figurative language achieves purpose 10F: Identify/explain use of repetition	2D Handwriting 11A-E Writing Process 11Di Compound sentences 11Dvii Pronouns 11Dx Commas in compound sentences 12D Letters	13C-E Inquiry and research
WEEK 3 *D'Aulaires Book of Norse Myths* *Portraits of Hispanic American Heroes*	Myths Biographies	2Aiv, Bv Decode/Spell words using syllable division patterns 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Read high-frequency words	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6F: Make inferences and use evidence 6H: Synthesize information 7E: Interact with sources 8A: Infer theme/distinguish it from topic 10D: Use of descriptive, literal, figurative language 10F: Author's use of language contributing to voice	2D Handwriting 11A-E Writing Process 11Di Compound sentences 11Dvii Pronouns 11Dx Commas in compound sentences 12A Poetry	13C-E Inquiry and research
WEEK 4 *Jason and the Golden Fleece; Perseus and Medusa* *Aplauso!: Hispanic Children's Theater*	Myths Drama	2Aiv, Bv Decode/Spell words using syllable division patterns 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Read high-frequency words	1A-E Oral language 3C Identify meaning of and use words with affixes 3D Identify, use explain meaning of idioms	4 Expression 5 Self-sustained reading	6F: Make inferences and use evidence 6H: Synthesize information 6I: Monitor comprehension and make adjustments 7C: Use text evidence 7G: Discuss ideas in text important to meaning 9C: Discuss elements of drama such as characters, dialogue, setting and acts 10C: Use of print and graphic features	2D Handwriting 11A-E Writing Process 11Di Compound sentences 11Dvii Pronouns 11Dx Commas in compound sentences 12A Poetry	13C-E Inquiry and research
WEEK 5 *Cupid and Psyche; The Sword of Damocles* *Aplauso!: Hispanic Children's Theater*	Myths Drama	2Aiv, Bv Decode/Spell words using syllable division patterns 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Read high-frequency words	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Intonation 5 Self-sustained reading	6H: Synthesize information 7B, D: Write a response to a text, retell and paraphrase texts 7F: Respond using new vocabulary 8C: Plot elements 9C: Discuss elements of drama such as characters, dialogue, setting and acts 10B: Use of text structure	2D Handwriting 11A-E Writing Process 11Di Compound sentences 11Dvi Prepositions 11Dx Commas in compound sentences 12A Poetry	13C-E Inquiry and research
WEEK 6: UNIT 4 REVIEW (AS NEEDED)							

Grade 3 Unit 5

Literature Selection	Genre	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Composition	Inquiry & Research
WEEK 1 *Damon and Pythias; The Wanderings of Aeneas* *Aplauso!: Hispanic Children's Theater*	Myths Drama	2Aiv, Bv Decode/Spell words using syllable division patterns 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Alphabetize words to third letter	1A-E Oral language 3A Use resources to determine meaning, syllabication, pronunciation	4 Expression 5 Self-sustained reading	6F: Make inferences and use evidence 7B, D: Write a response to a text, retell and paraphrase texts 7C: Use text evidence 9C: Discuss elements of drama such as characters, dialogue, setting and acts 10A: Author's purpose	2D Handwriting 11A-E Writing Process 11Di Compound sentences 11Dvi Prepositions 11Dx Commas in compound sentences 12A Poetry	13A-H Inquiry and research
WEEK 2 *Androcles and the Lion; Horatius at the Bridge* *Aplauso!: Hispanic Children's Theater*	Myths Drama	2Aiv, Bv Decode/Spell words using syllable division patterns 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Alphabetize words to third letter	1A-E Oral language 3A Use resources to determine meaning, syllabication, pronunciation	4 Intonation 5 Self-sustained reading	6F: Make inferences and use evidence 7C: Use text evidence 8C: Plot elements 9C: Discuss elements of drama such as characters, dialogue, setting and acts 10D: Describe how use of descriptive, literal, figurative language achieves purpose	2D Handwriting 11A-E Writing Process 11Di Compound sentences 11Dvi Prepositions 11Dx Commas in compound sentences 12A Poetry	13A-H Inquiry and research
WEEK 3 William Tell The Crocodile *Home at Last*	Folktale Poetry Fiction	2Aiv, Bv Decode/Spell words using syllable division patterns 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Alphabetize words to third letter	1A-E Oral language 3A Use resources to determine meaning, syllabication, pronunciation	4 Phrasing 5 Self-sustained reading	6F: Make inferences and use evidence 7B: Write brief comments 8A: Infer theme/distinguish it from topic 9B: Rhyme scheme, sound devices, structural elements in poems 10E: Use of literary devices, e.g., first- and third-person texts 10F: Author's use of language contributing to voice	2D Handwriting 11A-E Writing Process 11Dvi Prepositions 11Dviii Compound subjects 12B Informational texts	13A-H Inquiry and research
WEEK 4 *The Jungle Book* Eletelephony *Family Pictures*	Fiction Poetry Biography	2Av, Bvi Decode/Spell words using knowledge of prefixes 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Alphabetize words to third letter	1A-E Oral language 3A Use resources to determine meaning, syllabication, pronunciation	4 Attend to punctuation 5 Self-sustained reading	6F: Make inferences and use evidence 7C: Use text evidence 9A: Distinguishing characteristics of literature 9B: Rhyme scheme, sound devices, structural elements in poems 10A: Author's purpose 10F: Author's use of language contributing to voice	2D Handwriting 11A-E Writing Process 11Dvi Prepositions 11Dviii Compound subjects 12B Informational texts	13A-H Inquiry and research
WEEK 5 *Mowgli's Brothers* Father William *Maya's Blanket*	Fiction Poetry Fiction	2Av, Bvi Decode/Spell words using knowledge of prefixes 2Avi, Bvii Decode/Spell words using knowledge of suffixes 2Avii Alphabetize words to third letter	1A-E Oral language 3A Use resources to determine meaning, syllabication, pronunciation	4 Phrasing	6F: Make inferences and use evidence 7F: Respond using new vocabulary 8A: Infer theme/distinguish it from topic 9B: Rhyme scheme, sound devices, structural elements in poems 10A: Author's purpose 10F: Author's use of language contributing to voice	2D Handwriting 11A-E Writing Process 11Dvi Prepositions 11Dviii Compound subjects 11Dx Commas in a series 12B Informational texts	13A-H Inquiry and research
WEEK 6: UNIT 5 REVIEW (AS NEEDED)							

Grade 3 Unit 6

Literature Selection	Genre	Phonics, Decoding, Spelling	Vocabulary & Oral Language*	Fluency	Comprehension Skills, Response Skills, Genres, Author's Craft	Handwriting & Composition	Inquiry & Research
WEEK 1 *Tiger, Tiger* For want of a nail, the shoe was lost… *My Diary from Here to There*	Fiction Poetry Biography	2Aiii, Biii Decode/Spell abbreviations 2Av, Bvi Decode/Spell words using knowledge of prefixes 2Avi, Bvii Decode/Spell words using knowledge of suffixes	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7F: Respond using new vocabulary 8A: Infer theme/distinguish it from topic 9B: Rhyme scheme, sound devices, structural elements in poems 10B: Use of text structure 10E: Use of literary devices, e.g., first- and third-person texts	2D Handwriting 11A-E Writing Process 11Dviii Compound predicates 11Dx Commas in a series 11Dx Apostrophes in possessives 11Dxi Correct spelling 12A Personal narratives	13A-H Inquiry and research
WEEK 2 *Farmer Boy* Rikki-tikki-tavi Jimmy Jet and His TV Set	Fiction Fiction Poetry	2Aiii, Biii Decode/Spell abbreviations 2Av, Bvi Decode/Spell words using knowledge of prefixes 2Avi, Bvii Decode/Spell words using knowledge of suffixes	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7C: Text evidence 9A: Distinguishing characteristics of literature 9B: Rhyme scheme, sound devices, structural elements in poems 10C: Use of print and graphic features 10E: Use of literary devices, e.g., first- and third-person texts 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Dviii Compound predicates 11Dx Commas in a series 11Dx Apostrophes in possessives 11Dxi Correct spelling 12A Personal narratives	13A-H Inquiry and research
WEEK 3 *Farmer Boy* Trees *Wachale! Poetry and Prose about Growing Up Latino*	Fiction Poetry Poetry/ Fiction/ Autobiography	2Aiii, Biii Decode/Spell abbreviations 2Av, Bvi Decode/Spell words using knowledge of prefixes 2Avi, Bvii Decode/Spell words using knowledge of suffixes	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Attend to punctuation 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7E: Interact with sources 8A: Infer theme/distinguish it from topic 9A: Distinguishing characteristics of literature 9B: Rhyme scheme, sound devices, structural elements in poems 10D: Describe how use of descriptive, literal, figurative language achieves purpose 10F: Author's use of language contributing to voice	2D Handwriting 11A-E Writing Process 11Dviii Compound predicates 11Dx Commas in a series 11Dx Apostrophes in possessives 11Dxi Correct spelling 12A Personal narratives	13A-H Inquiry and research
WEEK 4 *Farmer Boy* *Wachale! Poetry and Prose about Growing Up Latino*	Fiction Poetry/Fiction/ Autobiography	2Av, Bvi Decode/Spell words using knowledge of prefixes 2Avi, Bvii Decode/Spell words using knowledge of suffixes	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Phrasing 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7A: Personal connections 7G: Discuss ideas in text important to meaning 8A: Infer theme/distinguish it from topic 9B: Rhyme scheme, sound devices, structural elements in poems 10F: Author's use of language contributing to voice 10G Identify and explain hyperbole	2D Handwriting 11A-E Writing Process 11Dviii Compound predicates 11Dx Commas in a series 11Dxi Correct spelling 12C Argumentative texts	13A-H Inquiry and research
WEEK 5 *Farmer Boy* *Wachale! Poetry and Prose about Growing Up Latino*	Fiction Poetry/Fiction/ Autobiography	2Av, Bvi Decode/Spell words using knowledge of prefixes 2Avi, Bvii Decode/Spell words using knowledge of suffixes	1A-E Oral language 3C Identify meaning of and use words with affixes	4 Expression 5 Self-sustained reading	6I: Monitor comprehension and make adjustments 7B, D: Write a response to a text 8A: Infer theme/distinguish it from topic 9B: Rhyme scheme, sound devices, structural elements in poems 10D: Describe how use of descriptive, literal, figurative language achieves purpose	2D Handwriting 11A-E Writing Process 11Dviii Compound predicates 11Dx Commas in a series 11Dxi Correct spelling 12C Argumentative texts	13A-H Inquiry and research
WEEK 6: UNIT 6 REVIEW (AS NEEDED)							

ADDITIONAL NOTES

- The following expectations will be embedded within various reading, writing, and other activities as described below:
  - 1A Listen actively, ask relevant questions to clarify information, and make pertinent comments.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Teacher-led small group lessons
  - 1B Follow, restate, and give oral instructions that involve a series of related sequences of action.
    - Cooperative literacy centers
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Transitioning into different activities or lessons
    - Following rules and procedures throughout the day (e.g., turning in work, moving from one location to the next)
  - 1C Speak coherently about the topic under discussion, employing eye contact, speaking rate, volume enunciation, and the conventions of language to communicate ideas effectively.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Teacher-led small group lessons
  - 1D Work collaboratively with others by following agreed-upon rules, norms, and protocols.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
  - 1E Develop social communication such as conversing politely in all situations.
    - Cooperative literacy centers
    - Think-pair-share activities during read alouds, shared writing lessons, and content-area lessons
    - Other cooperative group activities (e.g., hands-on science experiments, group projects)
    - Conducting presentations in class

- Informational texts in science and history/geography will be aligned with the units outlined in this scope and sequence to have students meet the following expectations:
  - 9D Recognize characteristics and structures of informational text, including:
    - 9Di The central idea with supporting evidence;
    - 9Dii Features such as sections, tables, graphs, timelines, bullets, numbers, and bold and italicized font to support understanding; and
    - 9Diii Organizational patterns such as cause and effect and problem and solution.
  - 9F Recognize characteristics of multimodal and digital texts.

- Note: HCA will address the following TEKS in Year 0 for ELAR Grade 3 so that the curriculum is fully aligned with the ELAR TEKS.
  - 9E Recognize characteristics of **argumentative** text by:
    - 9Ei Identifying the claim;
    - 9Eii Distinguishing facts from opinion; and
    - 9Eiii Identifying the intended audience or reader.

Attachment 8: Proposed Discipline Policy

(Attachment 8 is adapted from Attachment 8 on pages 187-195 in the HCA GEN 25 charter application.)

Provide the school's proposed discipline policy.

HERITAGE
CLASSICAL ACADEMY

Discipline Policy

(adapted with permission from the Atlanta Classical Academy Handbook and the Anna Julia Cooper Public Charter School Charter Application pp 48-53, one of the schools in the BCSI network)

Philosophy

HCA will create a positive, virtues-based school culture that is essential in supporting students' academic and moral excellence. Our mission is to foster moral character and civic virtue that will inspire students to become good and self-governing citizens. This virtues-based culture requires substantial planning, constant support, and commitment from the entire school community. HCA believes that students learn best in a safe and structured environment, and therefore it is the intent of the HCA Discipline Policy to affirm positive behavior and eliminate classroom, school event, and field lesson distractions caused by misbehavior. The expectations for student behavior are presented to families during the initial home visits, the first Back-to-School night in September, Parent/Teacher Conferences and in the Student and Family Handbook. Translation services are available as needed for families.

Alignment with Research Based Practices

Students who are engaged in learning tend not to misbehave. All HCA teachers will receive training from BCSI in effective classroom management and instruction that leads to high student engagement. Because 75% of our students will come from low income communities and many of these will be at risk, HCA will learn about trauma informed communities and Adverse Childhood Experiences (ACE) (https://www.cdc.gov/violenceprevention/pdf/preventingACES-508.pdf). In addition, our staff will receive training in Restorative Justice practices (http://larryferlazzo.edublogs.org/2015/05/02/the-best-resources-for-learning-about-restorative-practices-help-me-find-more/) that they will use in Class Forums in Lower School and during Advisory Periods. Since HCA will use Second Steps SEL curriculum for SPED students and initially the Panorama SEL survey until HCA can create its own assessment measurement of its core virtues, the staff will also understand the 5 SEL core competencies outlined by CASEL (https://casel.org/core-competencies/O. The crosswalk on the following page shows the relationships between HCA virtues, SEL, Trauma informed community and Restorative Justice.

Virtue	Social Emotional	Trauma Informed	Restorative Justice
Moderation	Self-management and impulse control	Use of calming language in discussions	Build and maintain healthy relationships
Courage	Perseverance and self-confidence	Ensure the student feels safe	Use mistakes as learning opportunities
Responsibility	Responsible decision-making	Maintain high expectations	Admit to wrong actions and think about what you can do moving forward
Citizenship	Relationship skills and social engagement	Be trustworthy and transparent	Team building; cooperation; civil discourse
Justice	Problem-solving skills; respect of others	Consider cultural, historical, racial and gender issues	Empathy; fairness
Wisdom	Ethical responsibility	Be conscious of your actions and their impact on others	Reflective listening

Behavior Support Practices

Behavior management problems take critical time away from teaching and learning; therefore, HCA will implement curriculum activities that teach social, emotional, and behavioral competencies. Self-discipline is seen as socially and morally responsible behavior that is motivated primarily by intrinsic factors, not solely by the anticipation of external rewards or fear of punishment. To ensure that a restorative response is promoted across the school campus, we will provide multiple opportunities for students to apply skills of social and moral problem-solving. A well-disciplined student will understand what is socially and personally healthy and productive, training the mind, and can correct his or her own behavior when straying from that ideal. HCA will enact the following strategies:

- **Reflection and Connection:** Students will be provided with a supervised space to reflect on their behavior so that they are able to have meaningful connections with teachers, administrators, school counselors, and peers to resolve any conflicts.
- **Character Building:** At HCA, students will be engaged in activities focused on character development through schoolwide assemblies, in-class advisory periods, volunteer

opportunities in the community, and student dialogue resolutions. Moral character will be developed by demonstrated student actions that merits recognition for good behavior.

- **Student-Parent-Teacher Conferences:** Parents will always be informed about student behavior issues. Students will be guided and encouraged to self-correct any disruptive behavior; however, interventions that required a parent conference will take place if student behavior does not improve.
- **Restorative Practices:** The expectation for meetings and problem-solving will be based on school-talk and restorative practices, nonviolent communication, and virtue-based conversation.

HCA Behavior Policies aim to prevent behavior problems by implementing targeted and intensive strategies to:

- Develop social problem-solving and decision-making skills among students;
- Establish and maintain close communication with each student's parents or caregivers, and to garner community support;
- Remediate and respond to chronic and serious behavior problems;
- Provide academic instruction and activities that motivate learning;
- Create a physical environment that is conducive to teaching and learning; and
- Establish predictable procedures and routines and implement additional effective schoolwide policies.

Behavior Expectations

All policies regarding student conduct and discipline flow from this general principle: students must fully engage themselves in the education HCA offers them. Therefore, HCA expects students to:

- Be polite and attentive both in and outside of class.
- Attend school consistently, be punctual, and take responsibility for making up any work promptly when absent.
- Be prepared for class and follow directions.
- Follow all reasonable requests made by adults on the premises with a positive attitude, and show respect for self, others, and property.
- Cooperate with and demonstrate respect for the faculty and staff, including administrators, teachers, secretaries, custodians, and any other people working at the school.
- Communicate in an acceptable tone of voice using an acceptable choice of words.
- Follow lunchroom, playground, field lessons, lab, and individual classroom rules.
- Follow school rules when participating in school-related events.
- Adhere to the uniform policy.
- Not use threats or intimidation against any other person.
- Respect the health and safety of others, safety rules, and not bring tobacco, electronic cigarettes, alcohol, or any illegal substances to school or school-related events.
- Be dismissed by the teacher, not the bell or the clock.
- Not leave the school premises without signing out in the main office
- Not bring radios, pagers, gaming devices, etc. to school; cell phones not used during school.
- Not bring anything to school that could be used to harm another or that is illegal.
- Abide by the HCA Honor Code once it is established in middle school.

HCA was founded to develop students in both mind and character. The school's virtues are the guiding

principles used to cultivate and nurture character. Students are expected to conduct themselves honorably in word and deed, to strive to live by the HCA virtues, and to encourage others to do so as well.

Affirming Positive Behavior

First and foremost, HCA seeks to affirm positive student behavior. Faculty and staff will be equipped with Virtue Cards, each card representing a different core virtue including a picture of a person whose life reflected that virtue, such as Nelson Mandela and Thomas Edison with Courage, thereby reinforcing the academic program through the discipline system. Virtue Cards will be given to students when faculty or staff members observe virtuous behavior or acknowledge exceptional academic effort. When students are acknowledged, it is important to directly associate the specific act of excellence with receipt of the Virtue Card. Classroom teachers will record Virtue Cards received in their gradebooks and families will be notified each week in the weekly Friday packet of any accolades. Students will be recognized in school assemblies for their virtuous behavior. Many students will begin to seek out opportunities to exhibit virtue and academic pursuit for the Virtue Card itself. Over time, virtuous habits are formed, and the students cease the extrinsic motivation, understanding that doing the right thing for the right reason provides enough motivation on its own.

Multi-Tiered System of Supports (MTSS) for Improving Behavior

Consistent with our approach in our education plan and support for special populations, HCA will use a Multi-tiered system of consequences for its Discipline Policy (several ideas taken from Houston Classical Academy application page 47):

First Tier: a) Student receives a Needs Improvement Card with the specific area needing improvement; b) Teacher and student discuss the violation, teacher redirects student behavior in the classroom setting; c) Student completes a Plan for Improvement aligned with Restorative Justice Practices.

Second Tier: a) Student receives a Needs Improvement Card; b) student is removed from class and meets with the Lower School Principal for discussion; c) Student completes a Plan for Improvement; d) student apologizes to the class in Class Forum or Advisory time using Restorative Justice practices; e) Family is notified.

Third Tier: a) Student receives a Needs Improvement Card; b) student meets with the CEO/Superintendent; c) student receives in-school suspension; d) Family meeting is required; e) Student completes a Plan for Improvement; f) Student apologizes to the school community using Restorative Justice practices.

Fourth Tier: a) Student receives a Needs Improvement Card; b) student meets with the CEO/Superintendent, and CEO/Superintendent conducts a thorough documented investigation to ensure the report is accurate and the appropriate length of suspension; c) student receives out of school suspension; d) Family meeting is required; e) Student completes a Plan for Improvement; f) Student apologizes to the school community using Restorative Justice practices.

Fifth Tier: Student behavior, such as bringing a firearm to school and some bullying offenses under TEC Sec. 37.0072 such as bullying that encourages suicide or the release of intimate visual material, qualifies for immediate expulsion based on TEC Section 37.005 classroom and school removal.

Serious infractions of the school behavior code may or must lead to suspension or expulsion:

Action	***School Response First Offense***	***Second Offense***	***Third Offense***
Use of illegal drugs on campus or at school events	Must be suspended	Must be suspended	Must be expelled
Use of alcohol on campus or at school events/trips	Must be suspended	Must be suspended	May be expelled
Bringing weapons to school	Must be expelled		
Bullying (TEC Sec 12.104)	May be suspended or must be expelled depending on the infraction	Must be suspended or expelled depending on the infraction	May or must be expelled depending on the infraction
Plagiarism (middle school)	May be suspended	Must be suspended	Must be expelled

Suspension and Expulsion
The CEO/Superintendent has the authority to suspend students or expel students as appropriate.

Short-term and in-school suspensions
Suspensions last from one to ten days depending on the severity of the infraction. All suspensions will require a conference between the parent(s), CEO/Superintendent, and Principal. A student discipline plan for improvement will be created during this conference, with the student participating in developing the plan. The conference will occur before the student is re-admitted to class. *The CEO/Superintendent may require the parent to observe the student in class upon the student's return*.

Long-term suspensions and expulsion
For especially serious violations of school order and safety or for habitually disruptive behavior, HCA will pursue long-term suspensions (greater than 10 days) or expulsion.

Serious violations include, at minimum, the following:

- Bringing or using a dangerous weapon;
- Sale or distribution of a drug or controlled substance;
- The commission of an act which, if committed by an adult, would be robbery or assault other than third- degree assault.

Students with Special Needs and EL Students
Nothing in the HCA Code of Conduct or Discipline Policy will be permitted to infringe upon any rights provided pursuant to the Individuals with Disabilities Education Act, Section 504 of the Federal Rehabilitation Act of 1973, the Americans with Disabilities Act, or TEC 37.004 and 20

U.S.C Section 1415 (k)(4) and subsequent amendments. Any student who is receiving special education services or has been identified as a student with a disability under the Individuals with Disabilities Act (IDEA) and whose acts are determined by the CEO/Superintendent or board of directors to have violated any rules, regulations, or laws as alleged, shall be referred to an IEP committee. The IEP committee will be responsible for determining if the student's conduct is a manifestation of his/her disability and whether such conduct warrants a change in placement, amendments to the IEP, and/or disciplinary actions. If the IEP committee determines that the student's conduct is not a manifestation of the student's disability, it shall determine what, if any, disciplinary actions shall be taken regarding offenses that the student has been found to have committed. The IEP committee shall also have the authority to consider, recommend, and implement any changes in a student's IEP or educational placement. Nothing in these rules shall alter or adversely affect the rights of students with disabilities under applicable federal and state laws.

HCA will also work closely with families of EL students to make sure expectations are clear and consequences are understood.

Bullying Policy
HCA will have a zero-tolerance for bullying, harassment, intimidation, and/or bodily harm that adhere to the definitions established in the Texas Code Chapter 37. HCA's bullying policy is as follows:

The term "bullying" means an act that is:

1. Any willful attempt or threat to inflict injury on another person, when accompanied by an apparent present ability to do so;
2. Any intentional display of force such as would give the victim reason to fear or expect immediate bodily harm; or
3. Any intentional written, verbal, or physical act which a reasonable person would perceive as being intended to threaten, harass, or intimidate that:
    a) Causes another person substantial physical visible bodily harm as such term is defined;
    b) Has the effect of substantially interfering with a student's education;
    c) Is so severe, persistent, or pervasive that it creates an intimidating or threatening educational environment; or
    d) Has the effect of substantially disrupting the orderly operation of the school.

The term applies to acts which occur on school property, on school vehicles, at designated school bus stops, or at school related functions or activities or by use of data or software that is accessed through a computer, computer system, computer network, or other electronic technology of a local school system. The term also applies to acts of cyberbullying which occur through the use of electronic communication, whether or not such electronic act originated on school property or with school equipment, if the electronic communication (1) is directed specifically at students or school personnel, (2) is maliciously intended for the purpose of threatening the safety of those specified or substantially disrupting the orderly operation of the school, and (3) creates a reasonable fear of harm to the students' or school personnel's person or property or has a high likelihood of succeeding in that purpose. Electronic communication includes but is not limited to any transfer of signs, signals, writings, images, sounds, data or intelligence of any nature transmitted in whole or in part by a wire, radio, cell phone, electromagnetic, photo electronic or photo optical system.

Bullying Policy

As a school with a zero-tolerance policy for bullying, harassment, intimidation, and physical bodily harm, HCA will clearly communicate its policies and procedures to all students and families through orientation, the Parent/Student handbook, in periodic school-wide assemblies, posting of the policy and resources in English and Spanish throughout the school in places easily visible to students and families, and through the adoption of anti-bullying programs. All staff will be trained to spot these forms of intimidation and will be required to report suspected bullying immediately to the assistant principal immediately.

Bullying/Intimidation/Harassment Protocols Report

1. *Report:* Students, families, and staff are expected to immediately report any suspected bullying, as defined above, to a staff member who must document the report and provide such documentation immediately to the CEO/Superintendent.

2. *Investigate:* The CEO/Superintendent will investigate the allegation, involving other appropriate staff as appropriate (and making the Principal aware of the investigation). The investigation should begin no later than the following school day and shall include interviewing the alleged perpetrator(s) and victim(s), identified witnesses, teacher(s) and staff members, and reviewing video surveillance if available.

3. *Notify:* At an appropriate time during or after the investigation, parents/guardians of the accused and the victim must be notified. The CEO/Superintendent will be involved in the notification of the guardians of both the accused and the victim.

4. *Discipline:* Upon confirming that bullying has occurred, the accused student will be charged with bullying and given an age-appropriate consequence which shall include, at minimum and without limitation, disciplinary action or counseling as appropriate under the circumstances. Students in grades six through eight found to have committed the offense of bullying for the third time in a school year shall be referred for appropriate due process by disciplinary hearing officers, panels, or tribunals, and or placement in another, more appropriate setting.

5. *Follow-Up:* HCA administrators will work with the counselors and social workers to craft a follow-up plan and timeline for all involved parties to provide after-care and follow up after the disciplinary proceedings. Retaliation against any person who reports, is thought to have reported, files a complaint, or otherwise participates in an investigation or inquiry is prohibited and such retaliation shall be considered a serious violation of the policy and independent of whether a complaint is substantiated. The CEO/Superintendent will review bullying records at the end of each semester as part of a formal review of discipline and culture and may choose to implement school-wide programming and/or more stringent disciplinary measures to address ongoing or frequent bullying incidents and/or reports.

6. *Record-Keeping:* All bullying allegations, whether proven and disproven through investigation, will be maintained in written record by the Lower or Middle School Principals. Records will not be made a part of the student's cumulative file unless the discipline assigned warrants such action; however, counseling and administrative staff will have access to bullying records throughout a student's tenure at the school.

Cell phone Usage at HCA

Cell phones or smart watches will be turned off and stored in the students' lockers or other appropriate places. Any such device used during the school day will be confiscated and held by the CEO/Superintendent until the end of the day, at which time a parent/guardian may pick up the device. A second offense will result in the device being held at school for three days, after which a parent/guardian may pick up the device. A third offense will result in the device being held for a week; a parent may pick up the device after that point, and the device

may not be brought on campus again.

Cell phones may be used by middle school students after 3:30 pm. These students must use their phones in an appropriate and responsible manner. The faculty and staff do maintain the ability to confiscate a student's phone if he or she is using it in an inappropriate way.

School employees (usually administrators) may conduct searches of property or persons when they have reason to suspect that the health, safety, or welfare of students or staff may be endangered.

HCA is not responsible for loss, theft, or breakage of items brought to school. Fines will be levied on parents for vandalism or theft committed by their students. Fines will also be levied for lost or damaged school property. Students may also be required to be involved in the maintenance or repair of damaged property.

Uniform Policy

HCA students will be expected to be in uniform during school hours, on field lesson trips, except when a special non-uniform day is designated. Students who do not come to class in uniform will be sent to the office to change into appropriate attire from the office stock if available. The Lower School principal will notify the parents of the uniform violation. The student will receive an appropriate consequence such as silent lunch or loss of recess for minor infractions. Repeated infractions will be address by the Lower School Principal. The School will not allow financial need to limit access to HCA, and this includes access to uniforms. At minimum, the School will fund one complete uniform set for children whose families qualify for financial assistance.

Attachment 9: Evidence of Community Support

(Letters of support have been updated from Attachment 9 pages 196-205 in the HCA GEN 25 charter application and new ones have been added.)

Provide evidence of support from intended community partners such as letters of intent/commitment, memoranda of understanding, and/or contracts.

UTHealth
The University of Texas
Health Science Center at Houston

Children's Learning Institute

Susan H. Landry, Ph.D.
Albert & Margaret Alkek Distinguished
Chair in Early Childhood
Michael Matthew Knight Professor of Pediatrics

Stuart Saunders
Heritage Classical Academy
602 Sawyer Street
Houston, TX 77007

Dear Stuart:

We are pleased to provide a letter of support for Heritage Classical Academy and your efforts to start a school for a divers group of students to provide them with an outstanding liberal arts education with a strong emphasis on reading. Your focus on scientifically based reading instruction including the use of Riggs phonics instruction is noteworthy.

The Children's Learning Institute was part of the state's Reading First Initiative and subsequent state and federal reading initiatives, and as a result, we have trained thousands of teachers in the components of scientifically based reading instruction. We would be delighted to train your teachers as needed in phonics, phonemic awareness, vocabulary development, comprehension, and fluency. Also, we are happy to support your team in the use of the reading diagnostic assessments such as the Texas Primary Reading Inventory (TPRI) and DIBELS.

It is impressive that your board is taking on the challenge of developing a charter school and we applaud you for creating one where the school will have well trained teachers to ensure that every child will read on grade level by the end of third grade.

Sincerely



Susan H. Landry, Ph.D.
Albert and Margaret Alkek Distinguished Chair in
Early Childhood
Michael Matthew Knight Professor of Pediatrics

HARBOR
CHRISTIAN ACADEMY

January 11, 2021

Dear Commissioner Mike Morath:

This letter is to express our support for the authorization of the Heritage Classical Academy by the Texas Education Agency. Heritage Classical Academy is seeking to provide an outstanding classical education with an equal emphasis on character education for our underserved student populations in Northwest Houston. We believe that the board's demonstrated leadership and commitment along with the embodiment of continuous improvement and quality tools will lead to a great public choice option for families. We are aware that TEA approved this application in 2020, and we support your approval in 2021.

Harbor Christian Academy is also a classical school serving students in Houston's Denver Harbor and the Greater Fifth Ward. We look forward to collaborating with Heritage Classical Academy board and team to launch this quality, classical education charter school in Houston.

Sincerely,

Beverly Smith

Beverly Smith
Chair, Board of Directors
Harbor Christian Academy

HBU
HOUSTON BAPTIST
UNIVERSITY

Office of the Provost
Tel 281-649-3232

December 11, 2020

Stuart D. Sanders, Chairman
Heritage Ed.
602 Sawyer Street, Suite 720
Houston, Texas 77007

Re: Heritage Ed., a Texas non-profit corporation
Heritage Classical Academy

Dear Mr. Saunders,

Houston Baptist University is supportive of your plans to create a charter classical school with the goal of serving less fortunate students in Houston. In addition, we are pleased to initiate collaboration with Heritage Classical Academy specifically for the purposes of:

1. Developing internship and student-teaching opportunities for HBU students seeking degrees in education and/or teacher certification; and
2. Developing specific teacher training around the classical education model leading to a classical education certification.

We look forward to the coming months and years of working together to achieve our common education goals.

Blessings,

Stan Napper

Stanley A. Napper
Provost and Vice President for Academic Affairs

SAN/lc

January 5, 2021

Commissioner Mike Morath
Texas Education Agency
1701 N. Congress Avenue
Austin, TX 78701

Dear Commissioner Morath:

I am writing to strongly support the charter application for Heritage Classical Academy, a proposed K-8 classical school. Heritage will educate students in northwest Houston, a community that would benefit deeply from a new high-quality neighborhood school option.

As the Founder and CEO of Families Empowered, I am acutely aware of the need and demand for more quality school options. Families Empowered has a network of thousands of diverse families across Texas who are looking for schools that work FOR THEM. During the pandemic we served more families than ever before, in fact this was the first year that we reached over 1.8M people via social media alone. All of these are people who are looking for options, and the current supply of quality charter school choices is not keeping up with demand.

Heritage Classical Academy's board Chair, Stuart Saunders, is a third-generation native Houstonian and a highly regarded business leader in our community. Stuart and I have worked together for two years and I believe he and his team have the skills and capacity necessary to create a truly outstanding school. They have engaged the community by surveying parents, listening to what parents say they want, and by doing national research to respond to the community need. They've continue to reach out to parents throughout this pandemic and, more than ever, the community needs options like this proposed school as we rebuild from this difficult time.

I enthusiastically support the approval of Heritage Classical Academy as a high-quality school option, and I hope you will do the same. Please feel free to contact me should you need anything further. Thank you for your consideration.

Sincerely,



Colleen Dippel Founder and CEO

Families Empowered

Families Empowered

Colleen Dippel, Chief Executive Officer, Families Empowered

January 16, 2020

Stuart D. Saunders
Chairman, Heritage Ed
602 Sawyer St, Ste 720
Houston, TX 77007

Dear Mr. Saunders,

We are pleased to support your efforts to establish Heritage Classical Academy (HCA), a classical charter school proposed for the northwest Houston area. In demonstration of that support, we at the Barney Charter School Initiative (BCSI) of Hillsdale College offer this letter describing our organization, the history of our support to HCA, and the basic terms for the support we expect to provide HCA in the future.

BCSI is an outreach program of Hillsdale College devoted to the revitalization of public education through the launch and support of classical charter schools. Our initiative began in 2010 and our first affiliated schools opened in 2012. Since that time, we have assisted in opening more than twenty schools in eleven states by offering curriculum, training, and consultation to school founders, teachers, and leaders. Thanks to the generous donations of our friends and supporters, we are able to offer these services as a gift to our school affiliates.

Affiliation with BCSI begins through a rigorous, semi-annual application process. We selected Heritage Classical Academy in our summer 2019 application process from among seven applicants. While our application process looks at multiple criteria, we were particularly impressed by the composition, mission, and dedication of the HCA board. We think that you are strongly situated for success as you seek to create an excellent school with fidelity to our curriculum and vision.

Subsequent to our application process, we have supported HCA by providing various resources and consultation, including, but not limited to, the following:

- Marketing support, including the creation of HCA logo materials
- Weekly support calls discussing various aspects of school startup
- Models for curriculum, school schedules, school policies, and board governance processes
- Two days of intensive charter school board training at Hillsdale College
- Feedback on multiple drafts of HCA's Generation 25 Charter School Application

Pending HCA's continued progress towards a strong opening that is consistent with our expectations and program, BCSI will continue to support your efforts and will offer HCA the opportunity to become a formal BCSI Affiliate and receive our certification marks. The benefits of this status include, but are not limited to, the following:

- License to use the BCSI Curriculum and online library of resources
- Regular online and in-person training and consultation for teachers, administrators, and board members
- Regular evaluation of the school against established criteria for excellence in the areas of governance, leadership, curriculum, instruction, and school culture
- Marketing and public relations resources and consultations
- Opportunity to participate in affiliate-school programs and competitions

We look forward to working together as you complete the steps to start a school in the Houston area.

Best Regards,



Dr. Kathleen O'Toole
Assistant Provost for K-12 Education

FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

December 18, 2020

Stuart Saunders
Heritage Classical Academy
602 Sawyer Street, Suite 720
Houston, TX 77007

Dear Stuart:

Thank you for selecting the YMCA of Greater Houston as a potential partner to provide after school care for Heritage Classical Academy, a classical education charter school for a diverse group of students in the Northwest Houston area. Your curriculum focus on academics and character education aligns perfectly with the values and program components of the Y.

The YMCA After School program provides youth with a safe place to go during out of school time. At the Y we believe that ALL children and teens have potential. Out of school time programs help youth realize who they are and what they can achieve. Activities promote positive social interactions, indoor and outdoor play, and reinforce academic and social learning concepts. By building confident kids today the Y is helping to assure that they will become contributing and engaged adults tomorrow.

The YMCA offers an integrated education and family health program for our partners that includes; an engaging after school program for your students; member preferred pricing; and access to a virtual experience that provides health and wellness components as well as youth education programs. We are confident that this program will meet and exceed the needs of your school community.

Congratulations on taking the bold next step to file a charter school application in January 2021. Keep us posted on your progress. Again, we would be honored to serve as your partner to ensure that the Heritage Classical Academy has access to an enriching after school program for its students and health and wellness services to build healthier families within your school community.

Sincerely,

Stephen Ives
President & CEO
YMCA of Greater Houston

United Way of Greater Houston
YMCA Mission: To put Judeo-Christian principles into practice through programs that build healthy spirit, mind and body for all. Everyone is welcome.

APQC
Make Best Practices Your Practices℠

December 10, 2020

Stuart Saunders
Heritage Classical Academy
602 Sawyer Street, Suite 720
Houston, TX 77007

Dear Stuart:

We are pleased to offer a letter of support for Heritage Classical Academy and your efforts to start a school for a diverse group of students to provide them with an outstanding liberal arts education with an equal emphasis on character education. We are impressed that you are committed to creating an organization that is high-performing and embraces continuous improvement and quality tools.

APQC is the world's most foremost authority in benchmarking, best practices, and process improvement. We are conveniently located in Houston not far from the proposed area where your new school will be located. We would be honored to serve as your partner to provide your leaders and teachers with the tools they need to ensure that Heritage Classical Academy is efficient, effective, and continuously improving to provide the best education possible for student success in college, career, and life.

Congratulations on bringing your vision - a new, classical education charter school to serve students in the Houston area - to reality in August 2022.

Sincerely,

Lisa Higgins
President & CEO
APQC

123 N. Post Oak Ln. | 3rd Floor | Houston, TX | 77024 | apqc.org | 1.800.776.9676 | INTL: +1.713.681.4020

[redacted]

January 14, 2021

Commissioner Mike Morath
Texas Education Agency
The Texas Education Agency
Generation Twenty-Four
1701 N. Congress Avenue
Austin, TX 78701

Dear Commissioner Mike Morath,

I writing to express my support for the authorization of the Heritage Classical Academy by the Texas Education Agency. Heritage Classical Academy is seeking to provide outstanding liberal arts education with an equal emphasis on character education for underserved students in Northwest Houston, Harris County. I believe that the board's demonstrated leadership and commitment, along with the embodiment of continuous improvement and quality tools will provide a great public choice options for families.

I am an educator and have been intimately involved in area that Heritage Classical Academy will serve. [redacted] Many of the schools in this area are magnet or Vanguard and are capped with waiting lists. There are no public school programs, ISDs or charters, offering a classical curriculum in this area of Houston. So currently, private schools are the only option for parents interested in a classical curriculum, and due to the tuition cost, that is not attainable for the students Heritage Classical Academy is seeking to serve.

As the [redacted] know how critical it is for the children to have access to high-quality educational options. As the state is working to raise the rigor of both schools and teacher preparation, authorizing Heritage Classical Academy's application to begin serving this community would be an excellent step towards furthering those goals. I am delighted to lend my expertise, support, and recommendation to seeing this school launched. Increasing high-quality choices for our high-need and high-risk students is a tremendous asset to our community and will provide parents with an option currently only available to families able to afford private educations.

I look forward to collaborating with Heritage Classical Academy's board and school team to launch this quality, classical education charter school in Houston. Please do not hesitate to contact me if you have any questions or need any additional information.

Best regards,

[redacted]

[redacted]

CAROLYN MEANS, M.ED., CEP

INDEPENDENT EDUCATIONAL CONSULTANT

December 27, 2020

Commissioner Mike Morath
Texas Education Agency
The Texas Education Agency
Generation Twenty-Four
1701 N. Congress Avenue
Austin, TX 78701

Dear Commissioner Morath:

This letter is to express my support for the authorization of the Heritage Classical Academy by the Texas Education Agency. Heritage Classical Academy is seeking to provide an outstanding liberal arts education with an equal emphasis on character education for our underserved student populations in Northwest Houston. I believe that the board's demonstrated leadership and commitment along with the embodiment of continuous improvement and quality tools will lead to an exceptional public choice option for families. The educational plan for Heritage Classical Academy is sound in every detail. Having taught Latin and English grammar and writing to middle school students, I can attest to the effectiveness of these subjects being taught together as part of the HCA curriculum design.

In the past seventeen years, I have served over 1,000 families in the Greater Houston area through my independent educational consulting practice, School Solutions. These families have primarily turned to me for help to find the right school for their child because public education was failing to meet their child's needs. My practice has thrived in large part due to the lack of sufficient school choice for families. In my 40 years as an educator, I taught in public and private schools and grew two new high schools. I took some of the first KIPP 8th grade graduates into the private high school where I was principal. I have visited over 130 private, public and charter schools in the central Houston area and consulted with many of these schools. I have offered to do what I can to collaborate with the Heritage Classical Academy board and team to launch this quality, classical education charter school in Houston.

No city can be great if its public schools do not serve children with equity. By failing to instill values of community and character, too many of our public schools fail to inspire pride in academic achievement. The collaboration of two of Houston's finest organizations, The Children's Learning Institute and The Neuhaus Education Center, will assure parents that children will be well served if discovered to have learning differences. Heritage Classical Academy would establish the kind of environment that I experienced as a student at Lamar High School where each student was known in the community and where character counted. I ask for another school option for Houston families now.

Sincerely,

Carolyn Means, M.Ed.
Certified Educational Planner

www.schoolsolutions.us

IECA INDEPENDENT EDUCATIONAL CONSULTANTS ASSOCIATION PROFESSIONAL MEMBER

2929 Westheimer Rd., Apt. 410
Houston, Texas 77098

Attachment 10: Bylaws

(By-laws have been updated from Attachment 10, pages 206-219 in the HCA GEN 25 charter application.)

Provide the proposed bylaws for the charter school's governing board or the existing bylaws of the sponsoring entity.

SECOND AMENDED AND RESTATED BYLAWS

OF

HERITAGE ED.

a Texas Nonprofit Corporation

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ARTICLE I
Purposes and Limitations

Heritage Ed. (the "Corporation") is organized and will be operated exclusively for charitable and educational purposes within the meaning of Sections 501(c)(3), 170(c)(2)(B), 2055(a)(2) and 2522(a)(2) of the Internal Revenue Code of 1986, as amended or the corresponding section of any future United States Internal Revenue Law (the "Code"), including, for such purposes, the making of distributions to organizations that qualify as exempt organizations described in Section 501(c)(3) and 170(c)(2) of the Code. The Corporation's purposes include, but are not limited to, any purposes set forth specifically in its Certificate of Formation, as may from time to time be amended (the "Certificate").

To further the Corporation's purposes and mission, the Corporation will have and exercise all of the powers conferred by the provisions of the Texas Business Organizations Code, as may from time to time be amended (the "TBOC"), not outside the scope of the Certificate.

No part of the net earnings of the Corporation may inure to the benefit of, or be distributable to its Directors, trustees, officers, or other private persons, except that the Corporation will be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the Certificate.

No substantial part of the activities of the Corporation may be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation will 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.

ARTICLE II
Members

The Corporation shall have no members.

ARTICLE III
Board of Directors

Section 3.1 General Powers. The affairs of the Corporation will be governed and overseen by the Corporation's Board of Directors ("Board"). The Board accepts and will not delegate ultimate responsibility for the governance, accountability, oversight and operation of any charter school, including academic performance and financial and operational viability, or for the oversight of any management company, if any, providing management services for any such school.

Section 3.2 Number; Qualifications. The number of directors on the Board ("Directors") is initially three (3). The number of Directors may be changed from time to time by resolution of the Board, provided that the number of Directors will be set at not less than five (5). No decrease in the number of Directors will have the effect of decreasing the term of any incumbent Director. Directors need not be residents of the State of Texas. Directors must be an

individual who is twenty-five (25) years of age or older. No family members of a Director within the third degree of consanguinity or second degree of affinity ("Family Member") shall serve as a Director concurrently. No person who receives compensation or remuneration from the Corporation or who has a Family Member that receives compensation or remuneration from the Corporation shall serve as a Director. No person who has been convicted of a misdemeanor involving moral turpitude, a felony, any offense listed in Texas Education Code §37.007(a), or any offense listed in the Code of Criminal Procedure Article 62.01(5) shall serve as a Director. A majority of the Directors must be qualified voters.

Section 3.3 Election, Class, and Term. The Directors will be elected at the annual meeting of the Directors. In order to provide for staggered terms of office, the Directors will be equally divided, as evenly as possible, into three (3) classes with respect to the time for which they will severally hold office and stand for election. The terms of the Directors in the first class will expire with the annual election by the Board to be held in the year 2021, the terms of the Directors in the second class will expire at the annual election to be held in the year 2022, and the terms of the Directors in the third group will expire at the annual election to be held in the year 2023; provided that, in any event and irrespective of the expiration of their terms, the Directors of any class will remain in office until their successors have been elected and qualified. At each annual meeting of the Board thereafter, the Directors elected and qualified to succeed the Directors of any class will be elected for a term of three (3) years expiring with the annual meeting of the Board occurring the third year thereafter (provided that the Directors of any class will remain in office until their successors have been elected and qualified), so that the term of office of one class of Directors will expire each year. If the total number of Directors is changed, any increase or decrease in Directors will be apportioned among the classes so as to maintain all groups of Directors as nearly equal in number as possible, and any additional Director elected to any group of Directors will hold office for a term which will expire with the term of the Directors in such group.

Section 3.4 Annual and Regular Meetings. The Board will hold an annual meeting in June at a time and place determined by the Board, which meeting will be held for the purpose of electing Directors and the transaction of other such business as may come before the meeting. The Board may provide, by resolution, the time and place, within the State of Texas for the holding of regular meetings, other than the annual meeting, without notice other than such resolution. In addition to the annual meeting, the Board will hold a minimum of four regular quarterly meetings within the State of Texas. If the election of Directors is for any reason not held on the day designated herein for any annual meeting, or at an adjournment thereof, the Board will cause the election to be held at a special meeting as soon thereafter as conveniently possible.

Section 3.5 Special Meetings. Special meetings of the Board may be called by the Chair or by any two Directors. The person or persons calling a special meeting of the Board may fix any place within the State of Texas as the place for holding the special meeting of the Board called by them.

Section 3.6 Notice; Waiver of Notice. Written notice for annual, regular and special meetings of the Board shall be posted for at least seventy-two (72) hours at a place convenient to the public at the Corporation's administrative office and shall include the time, place, and subject of the meeting. Notice to the Directors of a special meeting of the Board will be given at least

three (3) days prior to the meeting and may be delivered personally, by mail or by e-mail to the address or e-mail address for each Director as it appears on the records of the Corporation. If mailed, such notice will be deemed to be delivered when deposited in the United States mail in a sealed envelope so addressed, with postage thereon prepaid. If sent by e-mail, such notice will be deemed to be delivered when transmitted, with reasonable evidence of successful transmission. A Director may waive any notice required by these Bylaws, before or after the date and time stated in the notice, by written waiver signed by such Director, which waiver will be included in the minutes or filing with the corporate records. A Director's attendance at a meeting waives objection to lack of notice or defective notice of the meeting, unless the Director at the beginning of the meeting objects to holding the meeting or transacting business at the meeting because the meeting is not lawfully called or convened.

Section 3.7 Quorum and Voting. A majority of the Directors serving on the Board will constitute a quorum for the transaction of business at any meetings of the Board; provided that if less than a majority of the Directors are present at said meeting, a majority of the Directors present may adjourn the meeting from time to time without further notice. Each Director present will be entitled to one (1) vote upon each matter submitted to a vote at any such meeting.

Section 3.8 Manner of Acting. The act of the majority of the Directors present at a meeting of the Directors at which a quorum is present will be the act of the Board, except with respect to any action of the Board requiring a higher level of approval under the TBOC or the Certificate.

Section 3.9 Meeting by Remote Communications Technology. A meeting of the Board (or any Committee thereof) may be held by using a conference telephone or similar communications equipment, or another suitable electronic communications system, including videoconferencing technology or the Internet, or any combination, if the telephone or other equipment or system permits each person participating in the meeting to communicate with all other persons participating in the meeting. A Director's participation through an electronic communications system in a Board or Committee meeting (whether such meeting is otherwise held in person or by an electronic communications system) constitutes that Director's presence at the meeting for purposes of determining a quorum and for purposes of voting.

Section 3.10 Removal; Vacancies. A Director elected by the Board may be removed with or without cause at any meeting of the Directors by a vote of two-thirds of the other Directors then in office, provided notice of intention to act upon such matter shall have been given in the notice calling such meeting. A vacancy on the Board shall be filled by the affirmative vote of the majority of the remaining directors, regardless of whether that majority is less than a quorum. Any Director elected to fill a vacancy on the Board will serve a term expiring as of the scheduled expiration date of the term of his or her predecessor. A vacancy on the Board occasioned by a resolution of the Board to increase the number of Directors may be filled at a special meeting of the Board called for such purpose. Any Director elected to fill a vacancy created by an increase in the number of Directors shall serve until the next annual election of Directors or until his or her successor is elected and qualified.

Section 3.11 No Compensation. Directors will not receive any compensation for their services, but by resolution of the Board may be reimbursed for their expenses of attendance at

meetings of the Board. In furtherance of the foregoing, no family members of a Director within the third degree of consanguinity or second degree of affinity shall receive compensation in any form from the Corporation.

Section 3.12 Texas Open Meeting Act. The Corporation will comply with the Texas Open Meetings Act (Texas Government Code, Chapter 551) and will appropriately respond to requests pursuant to the Texas Public Information Act (Texas Government Code, Chapter 552).

ARTICLE IV
Committees of the Board

Section 4.1 Committees Generally. The Board, by resolution adopted by a majority of the Directors in office, may designate and appoint one or more committees of the Board, each of which will consist of two or more Directors (and no non-Directors), which committees, to the extent provided in such resolution, will have and exercise the specific delegated authority of the Board in the management of the Corporation, except that the no committees will have the power or authority of the Board to: (i) adopt, amend or repeal these Bylaws; (ii) amend the Certificate; (iii) fill vacancies on the Board or in any committee which has the authority of the Board; (iv) amend or repeal any resolution of the Board which by its express terms is not so amendable or repealable; (v) approve any merger or dissolution of the Corporation; (vi) be the final authority to hear or decide employee grievances, citizen complaints, or parental concerns; (vii) be the final authority to adopt or amend the budget, or to authorize the expenditure or obligation of state funds or the use of public property; (viii) be the final authority to direct the disposition or safekeeping of public records, except that the Board may delegate this function to any person, subject to the Board's superior right of immediate access to, control over, and possession of such records; (ix) be the final authority to adopt policies governing charter school operations; (x) be the final authority to approve audit reports under TEC, §44.008(d); or (xi) be the initial or final authority to select, employ, direct, evaluate, renew, non-renew, terminate, or set compensation for the Head of School. Other non-Director committees not having and exercising the authority of the Board in the management of the Corporation may be designated and appointed by a resolution adopted by a majority of the Directors present at a meeting at which a quorum is present; provided that such committee must have at least one (1) Director as a member and may have non-Directors as members. The delegation of authority to any committee will not operate to relieve the Board or any member of the Board from any responsibility imposed by law.

Section 4.2 Notice; Waiver of Notice. Notices or Waivers of Notice for all regular or special meetings of any committee will be given in accordance with requirements for regular or special meetings, as applicable, of the entire Board.

Section 4.3 Recordkeeping. All committees will, unless otherwise directed by the Board, keep regular minutes of the transactions at their meetings and will cause them to be recorded in books kept for that purpose in the office of the Corporation and will report the same to the Board at its next meeting. The Secretary or an Assistant Secretary of the Corporation may act as Secretary of the committee if the committee or the Board so requests.

Section 4.4 Committee Action Without a Meeting. No action which is required to be or may be taken at a meeting of any committee may be taken without a meeting.

Section 4.5 Term of Office. Each committee member will continue to serve in such capacity for so long as he or she continues to meet the qualifications for membership on the committee (including, if applicable, membership on the Board), unless such committee member is sooner terminated, resigns, or is removed from such committee by the Board.

Section 4.6 Chair. One member of each committee will be appointed chair of the committee as designated by the Board.

Section 4.7 Removal; Vacancies. A member of a committee may be removed with or without cause by action of the Board (excluding such committee member for purposes of such action, if applicable). A vacancy on a committee occasioned by the death, incapacity, resignation, or removal of a committee member will be filled in accordance with the procedures for regular election or appointment of a committee member.

Section 4.8 Quorum. Unless otherwise provided in the resolution of the Board designating a committee, a majority of the whole committee will constitute a quorum and the act of a majority of the members present at a meeting at which a quorum is present will be the act of the committee.

Section 4.9 Participation by Non-Directors. Although a committee may permit a non-Director or other person who is not a member of the committee to participate in a committee meeting, no person who is not a member of the committee will have any right to vote on any action taken by the committee (except in the case of a non-Director committee).

Section 4.10 Rules. Each committee may adopt rules for its own governance not inconsistent with these Bylaws or with rules adopted by the Board.

ARTICLE V
Officers

Section 5.1 Elected Officers. The elected officers of the Corporation will be a Chair, a Secretary, and a Treasurer. The Corporation may also have a Vice-Chair and such other officers, both active and honorary, as the Board may from time to time deem advisable. Such officers will be elected by the Board at its annual meeting, and they will hold office until their successors are elected at the second succeeding annual meeting of the Board and are elected and qualified, unless they earlier die, resign, or are removed from office. Any person may simultaneously hold more than one office, except that the Chair and the Secretary cannot be the same person. No person who has been convicted of a misdemeanor involving moral turpitude, a felony, any offense listed in Texas Education Code §37.007(a), or any offense listed in the Code of Criminal Procedure Article 62.01(5) shall serve as an officer of the Corporation.

Section 5.2 Duties of Chair. The Chair will preside at all meetings of the Board, and shall have general charge and supervision of the Board. The Chair may execute all contracts, deeds and other instruments for and on behalf of the Corporation and will do and perform all other things for and on behalf of the Corporation as the Board will authorize and direct. The Chair will enjoy and discharge generally such other and further rights, powers, privileges, and duties as customarily relate and pertain to the office of Chair or President.

Section 5.3 Duties of Secretary. The Secretary will cause to be kept complete and correct minutes of all meetings of the Board. The Secretary will cause to be issued notices of all meetings in accordance with these Bylaws or as required by law.

When authorized and directed by the Board, the Secretary will execute with the Chair all contracts, deeds, and other instruments for and on behalf of the Corporation. The Secretary will be the legal custodian of all books, deeds, instruments, papers, and records of the Corporation, the inspection of which will be permitted at all reasonable times by any Director or executive officer of the Corporation.

The Secretary will attend to such correspondence as may be incidental to his office, and will perform all other duties and discharge all other responsibilities which customarily relate and pertain to the office of Secretary.

Section 5.4 Duties of Treasurer. The Treasurer will cause to be kept accurate and complete books and records of all receipts, disbursements, assets, liabilities, and financial transactions of the Corporation.

The Treasurer will cause to be deposited all monies, securities, and other valuable effects of the Corporation in such depositories as the Board will authorize and direct and, whenever requested to do so by the Chair or the Board, will prepare and submit written statements, reports, and accounts fully and accurately reflecting the assets, liabilities, and financial transactions and condition of the Corporation.

The Treasurer will perform such other and further duties as the Board may from time to time direct, and he will perform all other duties and discharge all other responsibilities that customarily relate and pertain to the office of Treasurer.

The Treasurer will be released and discharged of all liabilities and responsibility for any monies, securities, and other assets of value committed by the Board to the custody of any person over whom he will have no direction or control.

Section 5.5 Head of School. The Head of School shall be a paid employee of the Corporation and shall have general charge and supervision of the administration of the affairs and business of the Corporation. The Head of School may execute all contracts, deeds and other instruments for and on behalf of the Corporation and will do and perform all other things for and on behalf of the Corporation as the Board will authorize and direct, and to perform such other duties as may be prescribed by the Board.

Section 5.6 Resignation and Removal. Any officer of the Corporation may resign by delivering a written resignation to the Corporation at its principal office or to the Chair or the Secretary. Such resignation will be effective upon receipt unless it is specified to be effective at some other time or upon the happening of some other event. If a resignation is made effective at a future date and the Corporation accepts the future effective date, the Board may fill the pending vacancy before the effective date if the Board provides that the successor does not take office until the effective date. Any officer of the Corporation may be removed from office by the Board with or without cause, but such removal will be without prejudice to the contract rights, if any, of the person so removed. Election or appointment of an officer does not in itself create contract rights.

Section 5.7 Vacancies. Vacancies in any elected office occasioned by the death, resignation, or removal of any elected officer will be filled by the Board, and such person or persons elected to fill such vacancy or vacancies will serve for the unexpired term of his predecessor and until a successor is elected and qualified, or until such officer's earlier death, resignation or removal. Vacancies in any appointed office occasioned by the death, resignation, or removal of any appointed officer may be filled by the Chair, and such person or persons appointed to fill such vacancy or vacancies will serve for the unexpired term of his predecessor and until a successor is elected and qualified, or until such officer's earlier death, resignation, or removal.

Section 5.8 Compensation. The compensation, if any, of the officers will be fixed from time to time by the Board; provided, however, that such compensation will include only reasonable compensation for personal services actually rendered.

ARTICLE VI
General Provisions

Section 6.1 Contracts. The Board may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to specific instances. Notwithstanding the foregoing, unless otherwise limited by the Board, the Head of School will have the power and authority to execute on behalf of and bind the Corporation with respect to contracts in the ordinary course of the Corporation's business and activities.

Section 6.2 Loans. No loans may be contracted on behalf of the Corporation and no evidences of indebtedness may be issued in its name unless authorized by the Board. Such authority may be general or confined to specific instances. The Corporation is prohibited from making loans to its Directors or officers under any circumstances.

Section 6.3 Checks, Drafts, and Similar Instruments. All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Corporation will be signed by such officer or officers, agent or agents of the Corporation and in such manner as may from time to time be determined by the Board.

Section 6.4 Deposits. All funds of the Corporation will be deposited from time to time to the credit of the Corporation in such banks, trust companies, or other depositories as the Board may select.

Section 6.5 Custodians. The Board may from time to time designate a bank, trust company, or depository as custodian of the funds and properties of the Corporation, which custodian will maintain a record of all receipts, expenditures, income, and expenses of the Corporation and/or perform such ministerial duties as the Board by written direction may instruct. The custodian may receive fees for its services as may from time to time be agreed upon by the Board and the custodian.

Section 6.6 Agents and Attorneys. The Board may appoint such agents, attorneys, and attorneys-in-fact of the Corporation as it may deem proper, and may, by written power of attorney, authorize such agents, attorneys or attorneys-in-fact to represent it and for it and in its name, place,

and stead, and for its use and benefit to transact any and all business which said Corporation is authorized to transact or do by the Certificate, and in its name, place, and stead, and as its corporate act and deed, to sign, acknowledge, and execute any and all contracts and instruments, in writing necessary or convenient in the transaction of such business as fully to all intents and purposes as said Corporation might or could do if it acted by and through its regularly elected and qualified officers.

Section 6.7 Fiscal Year. The Board will have the power to fix and from time to time change the fiscal year of the Corporation. In the absence of contrary action by the Board, the fiscal year of the Corporation will begin on the first day of July in each year and end on the last day of June in each year.

Section 6.8 Interpretation. The terms "include," "including" and similar terms shall be construed as if followed by the phrase "without being limited to." The term "or" has, except where otherwise indicated, the inclusive meaning represented by the phrase "and/or." The words "hereof," "herein," "hereby," "hereunder," and similar terms in these Bylaws refer to these Bylaws as a whole and not to any particular provision or section of these Bylaws. The masculine gender, when used throughout these Bylaws, will be deemed to include the feminine.

Section 6.9 Electronic Communications and Signatures. Electronic communications, records and signatures may be used in connection with all matters contemplated by these Bylaws except to the extent prohibited by applicable law. Except as may be specifically set forth herein, the parties may use and rely upon electronic communications, records and signatures for all notices, waivers, consents, undertakings and other documents, communications, or information of any type sent or received in connection with the matters contemplated by these Bylaws. An electronically transmitted (but not oral) document will be deemed to satisfy any requirement under these Bylaws or applicable law that such document be "written," "in writing" or the like. An electronic signature or electronically transmitted signature by any person on any document (properly authenticated) will be deemed to satisfy any requirement under these Bylaws or applicable law that such document be "signed" or "or executed" by such person. An electronic transmittal or communication (but not oral) of a document will constitute delivery of such document. Neither the Corporation nor any Director may contest the authorization for, or validity or enforceability of, electronic records and electronic signatures, or the admissibility of copies thereof, under any applicable law relating to whether certain agreements, files, or electronic records are to be in writing or signed by the party to be bound thereby.

Section 6.10 Conflicts of Interest Policy. The Board will adopt a Conflicts of Interest Policy that shall comply with Texas Local Government Code, Chapter 171, in the manner provided by the conflict of interest provisions described in §§100.1131-100.1135 of the Texas Administrative Code to govern conflicts of interest situations that may arise from time to time among the Corporation, Directors, and Corporation employees, officers, and agents.

ARTICLE VII
Indemnification of Officers and Directors

The Corporation will indemnify and protect any director, officer, employee, or agent of the Corporation, or any person who serves at the request of the Corporation as a director, officer,

employee, member, manager, or agent of another corporation, partnership, limited liability company, joint venture, trust, employee benefit plan, or other enterprise, to the fullest extent permitted by the laws of the State of Texas.

ARTICLE VIII
Property Devoted to Corporate Purposes

All income and properties of the Corporation will be devoted exclusively to the purposes as provided in the Certificate and these Bylaws. The Board may adopt such policies, regulations and procedures governing the management and/or disbursement of funds for such purposes as in its opinion are reasonably calculated to carry out such purposes as set forth in the Certificate and these Bylaws.

ARTICLE IX
Amendments

These Bylaws may be altered, amended or repealed, and new Bylaws may be adopted, by the affirmative vote of a majority of all Directors then in office at a meeting of the Board called for that purpose.

CERTIFICATION

The undersigned, being the Secretary of Heritage Ed., a Texas nonprofit corporation, hereby certifies that the foregoing Second Amended and Restated Bylaws are the duly adopted Bylaws of the Corporation.

Effective Date: Dec 7, , 2020

Kathryn van der Pol

Name: Kathryn van der Pol
Title: Secretary

Attachment 11: Code of Ethics and Conflict of Interest Policy

(Attachment 11 has been updated from Attachment 11, pages 220-234 in the HCA GEN 25 charter application.)

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.

HERITAGE ED
CODE OF ETHICS AND PROFESSIONAL CONDUCT

I. SCOPE.

Heritage Ed ("Organization") has adopted this Code of Ethics and Professional Conduct ("Code"), which applies to all directors, officers, and employees of the Organization (collectively, the "Covered Persons").

II. PURPOSE.

The Organization has a clearly stated mission and purpose, approved by the Organization's Board of Directors ("Board of Directors"), in pursuit of the public good. All of the Organization's programs support that mission and all who work for or on behalf of the Organization understand and are loyal to that mission and purpose. The Organization is proud of the values with which it conducts business. It has and will continue to uphold the highest levels of ethics and personal integrity in all of its actions and relationships. The Organization promotes a working environment that values respect, fairness, and integrity. All officers, directors, and employees of the Organization are to act with honesty, integrity and openness in all their dealings as representatives of the Organization. In furtherance of these values, and to ensure that the Organization, and each of its Covered Persons, conducts all Organization transactions and dealings with integrity and honesty, each Covered Person will annually review and acknowledge (by signing) the Code, which acknowledgement will be kept on file in the Organization's records.

The Code cannot, nor is it intended to, cover all activities or resolve all ethical or legal questions engaged in or encountered by Covered Persons. The Code will be updated and revised from time to time as appropriate to provide guidance and current information to Covered Persons. If you are not sure whether your actions comply with the Code, or if you are aware of a suspected or known Code violation, you should consult with your supervisor, the Compliance Officer, or the Board of Directors, as described below.

III. ETHICAL CONDUCT.

Each Covered Person will always do the following in connection with the performance of his or her duties for the Organization:

1. Recognize that the chief function of the Organization at all times is to further its charitable mission, as set forth in its mission statement.

2. Respect the structure and responsibilities of the Board of Directors; provide them with facts and advice as a basis for their policy-making decisions, and uphold and implement policies adopted by the Board of Directors.

3. Conduct organizational and operational duties with positive leadership exemplified by open communication, creativity, dedication, and compassion.

4. Exercise whatever discretionary authority they have under the law to carry out the Organization's mission.

5. Serve with respect, concern, courtesy, and responsiveness in carrying out the Organization's mission.

6. Demonstrate the highest standards of personal integrity, truthfulness, honesty, and fortitude in all activities in order to inspire confidence and trust in [name of entity's] activities.

7. Avoid any interest or activity that is in conflict with the conduct of his or her official duties.

8. Respect and maintain the confidentiality of confidential information entrusted to the Organization and its Covered Persons. Confidential information includes all non-public information that might be harmful to the Organization or its customers if disclosed. The obligation to preserve confidential information continues even after employment ends.

9. Strive for personal and professional excellence and encourage the professional development of others.

10. Use his or her best efforts to perform the Covered Person's duties to the highest possible standards.

No Covered Person will do any of the following in connection with the performance of his or her duties for the Organization:

1. Deceive, defraud, or mislead the Organization's Board of Directors, officers, staff members, managers, supervisors, other associates, or those with whom the Organization has business or other relationships.

2. Misrepresent the Organization in any negotiations, dealings, contracts, or agreements.

3. Obtain a personal advantage or benefit due to relationships established by any Organization officer, senior staff member, or member of the Board of Directors by use of the Organization's name.

4. Accept individual gifts of any kind with value in excess of $25 in connection with the Covered Person's relationship with the Organization or its clients or supported businesses, other than in-kind gifts or contributions made to the Organization and/or its entire Board of Directors. Any individual gifts received are to be reported to the Organization's Chief Financial Officer, or to the Chair of the Board of Directors if received by a director, who will report gifts received during the calendar year to the Board of Directors.

5. Engage in unethical business practices of any type.

6. Use the Organization's property, financial resources, or services of the Organization's personnel for personal benefit.

7. Knowingly violate any applicable law or ordinance.

IV. REPORTING RESPONSIBILITY.

It is the responsibility of all Covered Persons to comply with this Code of Ethics and Professional Conduct and to report violations or suspected violations to the reporting person's supervisor, the Head of School, or the Board of Directors, in accordance with the **Organization**'s Ethics and Whistleblower Policy. All reports will be promptly investigated and appropriate corrective action will be taken if warranted by the investigation.

The remainder of this page is left intentionally blank.

I have read, understand, and agree to be bound by and comply with this Code of Ethics and Professional Conduct.

_____

By:_____

Date:_____

HERITAGE ED
CONFLICTS OF INTEREST AND DOCUMENTATION POLICY

Scope

This Conflicts of Interest and Documentation Policy ("Policy") applies to all directors and officers of Heritage Ed ("Corporation") and any other person who is in a position to exercise substantial influence over the decisions and affairs of the Corporation (collectively, "Covered Persons").

Purpose

The purpose of this Policy is to protect the Corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a Covered Person or might result in a possible excess benefit transaction ("Proposed Transaction"). This Policy provides procedures for identifying situations that represent potential conflicts of interest, determining whether a conflict of interest exists and if present, addressing such conflict of interest. Procedures are also provided for periodic reviews to ensure that the Corporation is being operated in a manner consistent with its tax-exempt status. This Policy supplements (but cannot replace) any applicable laws governing conflicts of interest applicable to nonprofit organizations.

Policy

The terms in this Policy with initial letters capitalized have the meaning set forth in the section entitled "Definitions" or the meaning as designated in places throughout this Policy.

Duty to Disclose

If an Interested Person has a Position or Financial Interest in any business or other entity with which the Corporation is considering entering into an arrangement or transaction, the Interested Person must disclose the existence of his or her Position or Financial Interest and all material facts related thereto to the Corporation's Board of Directors ("Board") or Executive Committee as soon as the Interested Person has knowledge of the potential arrangement or transaction, and whenever requested by the Board or the Executive Committee.

Determining Whether a Conflict of Interest Exists

After disclosure of a Position or a Financial Interest by an Interested Person, and after any discussion with the Interested Person, the Interested Person (including those Interested Persons who are members of the Board or the Executive Committee) will leave the Board or Executive Committee meeting while the determination of whether a conflict of interest exists in connection with the Proposed Transaction is discussed by the Board or the Executive Committee and voted upon. A Position or a Financial Interest will be considered a conflict of interest only if the Board or the Executive Committee makes such determination. An Interested Person is considered to have a conflict of interest with respect to his or her Compensation if the person receives Compensation from the Corporation and the person's Compensation is being discussed or reviewed by the Board or any committee thereof.

Procedures for Addressing the Conflict of Interest

- Before any discussion and vote on whether a conflict of interest exists, an Interested Person may make a presentation to the Board or the Executive Committee regarding the Interested Person's Position or Financial Interest. After such presentation, the Interested Person will leave the meeting during the discussion of, and the vote on, the Proposed Transaction.

- The Board or the Executive Committee will undertake appropriate due diligence and inform itself of all material information reasonably available to it and explore all reasonable alternatives to the Proposed Transaction that would not involve the conflict of interest.

- If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board or the Executive Committee will determine by a majority vote of the Disinterested Directors whether the Proposed Transaction is (i) in the Corporation's best interest, (ii) for the Corporation's own benefit, and (iii) fair and reasonable to the Corporation. In conformity with this determination, the Board or the Executive Committee will make its decision as to whether the Corporation may enter into the Proposed Transaction.

Quorum for Board or Executive Committee Action

For purposes of the Board or the Executive Committee actions to be taken under these procedures, including the determination whether a conflict of interest exists, a majority of the Disinterested Directors on the Board or the Executive Committee will constitute a quorum. However, in no case will a single Disinterested Director take any such action.

Violations of the Conflicts of Interest Policy

If the Board or the Executive Committee has reasonable cause to believe that a Covered Person has failed to disclose a Position or a Financial Interest, it will inform the Covered Person of the basis for such belief and afford the Covered Person an opportunity to explain the alleged failure to disclose.

If, after hearing the response of the Covered Person and making such further investigation as may be warranted under the circumstances, the Board or the Executive Committee determines that the Covered Person has in fact failed to disclose a Position or a Financial Interest, the Board or the Executive Committee will take appropriate disciplinary and corrective action.

Documentation in Minutes

The minutes of the Board or the Executive Committee will contain:

- With respect to the determination of whether a conflict of interest exists, the name of the Interested Person who disclosed or was otherwise found to have a Position or Financial Interest in connection with an actual or potential conflict of interest; the nature of the Position or Financial Interest; any action taken to determine whether a conflict of interest was present; and the Board or the Executive Committee's decision as to whether a conflict of interest in fact existed.

- With respect to whether or not the conflict of interest transaction is approved, the names of the persons present for the discussions and vote related to the Proposed Transaction; the

content of the discussion; whether alternatives were discussed that did not involve a conflict of interest; the basis for the determination that the Proposed Transaction was (i) in the Corporation's best interest, (ii) for the Corporation's own benefit, and (iii) fair and reasonable to the Corporation; and the record of the vote taken in connection with the proceedings.

Annual Statements

Each Covered Person will annually sign a statement that affirms such person:

- has received a copy of this Policy;
- has read and understands the Policy;
- has agreed to comply with the Policy; and
- understands the Corporation is exempt from federal income tax and to maintain its federal tax exemption the Corporation must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

In addition, each Covered Person will annually complete, sign and promptly return to the Board or the Executive Committee a Questionnaire and Disclosure Statement substantially in the form attached hereto. A Covered Person need not disclose Compensation paid to the Covered Person by Corporation pursuant to a resolution of the Board.

Periodic Reviews

To ensure that the Corporation operates in a manner consistent with its tax-exempt purposes and that it does not engage in activities that could jeopardize its status as an organization exempt from federal income tax, the Board or the Executive Committee will conduct periodic reviews. The periodic reviews will, at a minimum, include the following subjects:

- whether the Corporation Compensation arrangements are reasonable, based on competent survey information, and are the result of arm's-length bargaining; and
- whether transactions and arrangements with other entities and individuals conform to the Corporation's policies, are properly recorded, reflect reasonable payments for goods and services, further the Corporation's tax-exempt purposes and do not result in private inurement, impermissible private benefit, or in an excess benefit transaction.

Use of Outside Experts

When conducting the periodic reviews provided for above, the Board or the Executive Committee should rely on appropriate outside experts such as attorneys, appraisers, or compensation or other consultants.

Definitions

Business Transaction: business transactions include, but are not limited to, contracts of sale, lease, license, and performance of services whether initiated during the year or ongoing from a prior year. Business transactions also include joint ventures (new or ongoing) in which either the profits or capital interest of the Corporation and you (and/or a Related Person) each exceed 10%.

Business transactions also include a transaction between the Corporation and a management company if you are a direct or indirect 35% owner, or an officer, director, trustee, or key employee.

Compensation: wages, commissions, fringe benefits, royalties, honoraria, fees, and any and all other direct or indirect remuneration, as well as gifts or favors that are substantial in nature.

Debt Interest: ownership of debt or debt securities owed or issued by an entity or individual, whether secured or unsecured, including without limitation:

- loans, notes, bonds, and debentures, and any other evidence of indebtedness or liability for borrowed money; and
- any rights, warrants or options, or other securities that are exercisable, exchangeable or convertible for or into any of the foregoing.

Disinterested Director: a director of the Corporation who is not an Interested Person.

Equity Interest: ownership of equity securities issued by an entity, including without limitation:

- in the case of a corporation, capital stock;
- in the case of an association or business entity, any and all shares, interests, participations, rights or other equivalents (however designated) of capital stock;
- in the case of a partnership or limited liability company, partnership or membership interests (whether general or limited);
- any other interest or participation that confers the right to receive a share of the profits and losses of, or distributions of assets of, the issuing entity; and
- any rights, warrants or options, or other securities that are exercisable, exchangeable or convertible for or into any of the foregoing.

Financial Interest: a Covered Person has a Financial Interest with respect to a potential arrangement or transaction if the Covered Person, directly or indirectly, through business, investment or a member of his or her Immediate Family:

- has or anticipates acquiring a Debt Interest or Equity Interest with respect to any entity or individual that provides goods or services to, or has any other transaction or arrangement with the Corporation, or is negotiating such a transaction or arrangement, if such interest exceeds the lesser of (i) $100,000 in fair market value, or (ii) 5% of the outstanding debt/debt securities owed/issued by the entity or individual, or equity securities issued by the entity, as applicable; or
- receives or anticipates receiving Compensation from the Corporation or from any entity or individual that provides goods or services to, or has any other transaction or arrangement with, the Corporation or is negotiating such a transaction or arrangement, and such Compensation, transaction or arrangement is being considered by the Board or a committee thereof.

Immediate Family: a Covered Person's spouse, ancestors (including parents, grandparents and great-grandparents), brothers and sisters (whether whole or half blood) and the children (natural or adopted), and grandchildren of the Covered Person, and the spouse's brothers, sisters, children and grandchildren.

Interested Person: a Covered Person who holds a Position or a Financial Interest. If a Covered Person is an Interested Person with respect to any of the Corporation's affiliates, he or she is an Interested Person with respect to the Corporation and all of such affiliates.

Position: a Covered Person holds a Position if the Covered Person or a member of his or her Immediate Family is or anticipates becoming a director, trustee, officer, employee, or agent of, a consultant or advisor to, or the holder of any other position with, any entity or individual that provides goods or services to, or has any other transaction or arrangement with the Corporation or is negotiating such a transaction or arrangement.

Related Person: a Family Member or an entity that is 35% controlled by you and your Family Members. A Related Person also includes an entity (other than a tax-exempt entity under Section 501(c)) of which you were serving, at the time of the transaction, as an officer, director, trustee, key employee, partner/member with an ownership interest of more than 5% if the entity is taxable as an partnership, or a shareholder with an ownership interest of more than 5% if the entity is a professional corporation.

Related Organization: a Related Organization means an organization that is a parent entity, subsidiary, commonly controlled, supporting organization, or supported organization of the Corporation.

ANNUAL DISCLOSURE STATEMENT

PERSONAL AND CONFIDENTIAL

Instructions: In connection with completing this disclosure statement, please review the Conflicts of Interest and Documentation Policy ("Policy") of Heritage Ed ("Corporation"). Terms used in this form with initial letters capitalized and not otherwise defined will have the meaning given to them in the Policy. When providing answers, if there is insufficient space, please complete your answer on a separate sheet of paper and attach to this form. Please submit the completed form to _____.

COVERED PERSON:

Name: _____

Position with the Corporation (Check all that apply):

☐ Director ☐ Officer ☐ Key Employee ☐ Other: _____

Section I: POSITIONS AND FINANCIAL INTERESTS:

☐ Yes ☐ No Did you or any member of your Immediate Family during the past year engage in, or do you anticipate that you or any member of your family will engage in, a transaction or arrangement with the Corporation?

☐ Yes ☐ No Do you or member of your Immediate Family hold, or anticipate holding, a Position (*e.g.*, director, trustee, officer, employee, agent, consultant, advisor, etc.) with any entity that to the best of your knowledge and belief provides goods or services to, or has any other transaction or arrangement with, the Corporation or is negotiating such a transaction or arrangement? If yes, please answer Section VIII.

☐ Yes ☐ No Do you or any member of your Immediate Family directly or indirectly, have, or anticipate receiving or acquiring, a Financial Interest or receive any compensation (wages, commissions, fringe benefits, royalties, honoraria, fees, gifts, etc.) with respect to any entity that provides goods or services to, or during the past year or current year has had any other transaction or arrangement with, the Corporation or is negotiating such a transaction or arrangement?

IF YOU ANSWERED "YES" TO ANY OF THE ABOVE QUESTIONS, PLEASE COMPLETE SECTION VIII OF THIS FORM. PLEASE FILL OUT A SEPARATE SECTION VIII FOR EACH IMMEDIATE FAMILY MEMBER FOR WHICH YOU ARE REPORTING.

Section II: EMPLOYER INFORMATION (IMMEDIATE FAMILY):

☐ Yes ☐ No Does any Member of your Immediate Family hold a Position (*e.g.*, director, officer, employee, agent, consultant, advisor, etc.) with the Corporation? If yes, please state his or her name, Position and relationship to you:

(1) _____

(2) _____

(3) _____

Section III: OTHER INTERESTS:

Describe any other relationship, activity or situation which could be construed as placing you in a position where there is a conflict between your personal interests (or those of any Immediate Family) and the interests of the Corporation:

_____

_____

_____

Section IV: INDEPENDENCE OF BOARD MEMBER (TO BE ANSWERED BY DIRECTORS ONLY)

☐ Yes ☐ No Are you an independent board member? A member of the board is considered independent only if all three of these circumstances applied at all times during the preceding tax year of the Corporation:

1. The board member was not compensated as an officer or other employee of the Corporation or of a Related Organization, except for the religious exception discussed below.

2. The board member did not receive total compensation or other payments exceeding $10,000 for the year from the Corporation or from related organizations as an independent contractor, other than reimbursement of expenses or reasonable compensation for services provided in the capacity as a member of the governing body. For example, a person who receives reasonable expense reimbursements and reasonable compensation as a director of the organization does not cease to be independent merely because he or she also receives payments of $7,500 from the Corporation for other arrangements.

3. Neither the director, nor any Immediate Family of the director, was involved in a transaction with the Corporation, directly or indirectly through affiliation with another organization, that is a loan, a grant described in Section VI or a Business Transaction described in Section VIII for the Corporation's preceding tax year or a loan, grant or Business Transaction with a Related Organization for the preceding year.

A member of the governing body is not considered to lack independence merely because of any of the following circumstances:

1. The member is a major donor to the Corporation, regardless of the amount of the contribution.

2. The member has taken a bona fide vow of poverty and either (a) receives compensation as an agent of a religious order or of a religious and apostolic organization, but only under circumstances in which the individual does not receive taxable income or (b) belongs to a religious order that receives sponsorship or payments from the organization that do not constitute taxable income to the member.

3. The member receives financial benefits from the Corporation solely in the capacity of being a member of the charitable or other class served by the Corporation in the exercise of its exempt function, such as being a member

of a trade association, so long as the financial benefits comply with the Corporation's terms of membership.

Section V: RELATIONSHIPS WITH OTHER OFFICERS, DIRECTORS, OR KEY EMPLOYEES

☐ Yes ☐ No Is any other director, officer or key employee a member of your Immediate Family?

If yes, please identify the person(s) with whom you have a family relationship. _____

☐ Yes ☐ No Do you have a business relationship (see below) with any other director, officer or key employee?

Business relationships between two persons include the following:

1. One person is employed by the other in a sole proprietorship or by an organization with which the other is associated as a trustee, director, officer, key employee, or greater-than-35 percent owner.

2. One person is transacting business with the other (other than in the ordinary course of either party's business on the same terms as are generally offered to the public), directly or indirectly, in one or more contracts of sale, lease, license, loan, performance of services, or other transaction involving transfers of cash or property valued in excess of $10,000 in the aggregate during the tax year. Indirect transactions are transactions with an organization with which the one person is associated as a trustee, director, officer, key employee, or greater-than-35 percent owner.

3. The two persons are each a director, trustee, officer, or greater than 10 percent owner in the same business or investment entity.

Ownership is measured by stock ownership (either voting power or value) of a corporation, profits or capital interest in a partnership or limited liability company, membership interest in a nonprofit organization, or beneficial interest in a trust. Ownership includes indirect ownership (*e.g.*, ownership in an entity that has ownership in the entity in question); there may be ownership through multiple tiers of entities. A business relationship does not include, for these purposes, the following privileged relationships: (1) attorney-client; (2) medical professional (including psychologist) and patient; and (3) priest/clergy and penitent/communicant.

If yes, please identify the person(s) with whom you have a business relationship and the type of relationship. _____

_____

Section VI: GRANTS FROM CORPORATION:

☐ Yes ☐ No Did you or a Related Person receive a grant or assistance from the Corporation in the past year? Examples of grants are scholarships, fellowships, internships, prizes and awards.

If yes, please describe the grant and the relationship, if the grant was made to a Related Person. _

_____

_____

_____

_____

Section VII: COMPENSATION FROM A RELATED ORGANIZATION

☐ Yes ☐ No Do you, or did you in the past year, receive Compensation from a Related Organization? If so, please describe the amount of compensation and the Related Organization.

_____

_____

_____

_____

Section VIII: DISCLOSURE OF POSITIONS AND FINANCIAL INTERESTS

THIS SECTION SHOULD BE COMPLETED ONLY IF YOU ANSWERED "YES" TO ONE OR BOTH OF THE QUESTIONS IN THE DISCLOSURE STATEMENT SECTION ENTITLED "Section I: POSITIONS AND FINANCIAL INTERESTS". If you are disclosing multiple interests, please make the appropriate number of copies of this page before completing.

PERSON HOLDING POSITION OR FINANCIAL INTEREST:

The disclosures made in this Section relate to a Position or Financial Interest held by:

☐ You ☐ Immediate Family

If for an Immediate Family member, indicate his or her name and relationship to you:

Name: _____ Relationship: _____

ENTITY OR INDIVIDUAL WITH RESPECT TO WHICH POSITION OR FINANCIAL INTEREST HELD:

Information regarding the entity with respect to which the Position or Financial Interest is held:

Name: _____

Address: _____

_____

Type of Entity in which Interest is held:

☐ Individual/Sole Proprietorship ☐ Corporation ☐ Partnership
☐ Limited Liability Company ☐ Trust ☐ Association
☐ Government (or agency or political subdivision thereof) ☐ Other: _____

POSITION OR FINANCIAL INTEREST HELD:

☐ Yes ☐ No Is a Position held with the entity or individual? If yes, please check all that apply:

☐ Director ☐ Trustee ☐ Officer ☐ Employee ☐ Agent ☐ Consultant ☐ Advisor

☐ Other: _____

Describe duties: _____

_____

☐ Yes ☐ No Is a Financial Interest held with respect to the entity or individual? If yes, please check all that apply:

☐ Wages ☐ Commissions ☐ Bonuses ☐ Fringe Benefits ☐ Fees

☐ Partner ☐ Shareholder ☐ Member ☐ Other Equity/Debt Ownership/Options

☐ Other: _____

If Financial Interest, state percentage ownership interest held: _____

☐ Yes ☐ No Has the Position and/or the Financial Interest been affected by the provision of goods or services to, or other transaction or arrangement with, the Corporation or, to the best of your knowledge and belief, will such Position and/or Financial Interest be affected by such provision or other transaction or arrangement in the future? If yes, please explain:

_____

_____

BUSINESS TRANSACTIONS:

☐ Yes ☐ No Does or will the entity or individual have a Business Transaction with the Corporation or is it negotiating or will it negotiate a Business Transaction with the Corporation? If so, describe the Business Transaction or proposed Business Transaction and the amount involved: _____

_____

_____

Section IX: SIGNATURE AND AFFIRMATION STATEMENT

By signing below, I am affirming that the foregoing answers on this disclosure statement are, to the best of my knowledge, true, accurate and correct, and that I have received a copy of the Corporation's Conflicts of Interest and Documentation Policy ("Policy"), that I have read and understand the Policy, that I agree to comply with the Policy, and that I understand the Corporation is an entity that is exempt from federal income tax and must engage primarily in activities that accomplish one or more of its exempt purposes to maintain its tax exemption.

_____

Signature

Printed Name and Title: _____

Date: _____

Existing Relationships:

There are currently no relationships that board members have that pose any actual or perceived conflicts of interest if the application is approved.

Steps to Avoid Conflicts:

The board will ensure that all new board members understand and sign the code of ethics and conflicts of interest policy. Prior to being approved as a member, the board will evaluate to ensure no conflicts exist. Lastly, on an annual basis, board members will be required to complete the attached disclosure form to avoid any conflicts and mitigate any perceived ones

Attachment 12: Board Members' Résumés and Biographical Affidavits

(Attachment 12 has been updated from Attachment 12, pages 235-299 in the HCA GEN 25 charter application.)

For each member of the proposed school's governing board, provide a résumé AND a notarized Board Member Biographical Affidavit. The required affidavit template is available in the *Additional Attachments PDF Forms* document on the New Operator 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.**

CHELSEA POPE COLLINS

CAREER PROFILE

- Twenty-two years of experience as an administrator and teacher in private, public, and charter school systems.
- Five years of administrative experience as Division Head providing leadership and support for a faculty of 50 and guidance and a student body of more than 400.
- Skilled problem-solver, decision-maker, collaborator, communicator, and life-long learner.

EDUCATION

Doctorate of Education and Administrative Leadership – May 2020
Texas A & M University – College Station, TX

Master of Arts (Organizational Leadership) – 2007
Teachers College, Columbia University – New York City, NY

Bachelor of Science in Chemistry – 1997
Fisk University – Nashville, TN

PROFESSIONAL EXPERIENCE

The Kinkaid School, Houston, TX **August 2003 – Present**
Independent School, Co-ed, PK-12th grade, day school, 1600 students | www.kinkaid.org

Middle School Division Head (Principal) **July 2013 – Present**
Faculty: 50+
Student Body: 440+

- Planned and implemented new master learning schedule
- Planned and implemented one-to-one laptop program
- Implemented on-line grade reporting system
- Oversaw middle school curriculum alignment
- Conduct classroom observations and evaluation of faculty
- Advise and plan whole school initiatives as a member of the Senior Administrative Team
- Host parent education series and events (Parents Council, Peer Parenting, Parent Forums)
- Coordinate divisional professional development
- Manage approximately $400K budget

Middle School Assistant Principal **August 2010 – June 2013**
(and Grade 8 Math Teacher)
Scope of position included:

- Supported the principal, faculty, staff, and student body in daily functions and routines.
- Devised and coordinated faculty and student scheduling, standardized testing, and student discipline.
- Implemented a revised advisory and student leadership program.

Additional Responsibilities Included:

- Co-sponsored of 8th Grade Peer Mentor Program.
- Co-facilitated parent meetings for students with learning accommodations.
- Served as mentor for incoming faculty/staff members.

Middle School Coordinator of New Student Support **July 2011 – 2013**

Scope of position included:

- Provided academic and social guidance and support to newly enrolled students.
- Hosted program activities for new families and students; coordinated New Family and New Student Socials.
- Proficiently developed and maintained strategic alliances with educators, counselors, and alumni to effectively optimize transition efforts.

Assistant Director of Admission **August 2007 – 2010**

(and Grade 5 Study Skills Teacher)

Scope of position included:

- Lead middle school and upper school admission committees.
- Thoroughly and accurately presented information to prospective families regarding the school's admission requirements, academic programs, policies, and procedures.
- Reviewed students' files and assigned advocate placement.
- Served as school representative at recruitment fairs and school previews.
- Worked with diverse groups within the Greater Houston Area to efficiently increase awareness of the programs offered by the school.

Additional Responsibilities Included:

- Served as a representative on the All-School Task Force to review all-community survey data for recommendations to the Board of Trustees.
- Served as a Diversity Coordinator (Admission Liaison).

Summer Program Director **January 2005 – 2010**

(The Kinkaid/HISD Engineering Math & Science Summer Institute)

Scope of position included:

- Provided support and leadership for a faculty of 15 and student body of 100+.
- Managed a $100K budget
- Developed and published an Annual Report for the Board of Trustees and program sponsors.
- Assisted in the solicitation of sponsorship and funding.

Grade 5 Science Teacher and Advisor **August 2003 – May 2006**

Scope of position included:

- Planned specific program of study and directed the student learning process to achieve curriculum goals.
- Applied individualized teaching techniques and varied instructional strategies to meet the needs of all students.
- Appropriately held students accountable for their own learning.
- Created traditional and non-traditional assessments of students.
- Documented academic, social, and emotional student performance through formative and summative assessments.
- Contributed expertise, ideas, and academic goals for interdisciplinary themes.
- Appropriately integrated the use of technology to facilitate student learning.

Additional Duties Included:

- Facilitated faculty in-service workshops—*Schools Attuned.*
- Served as Interim Grade Level Dean.
- MS Cheerleading Sponsor.
- Houston Area Independent School Diversity Coalition Representative.

KIPP: 3D Academy, Houston, TX **August 2002 – June 2003**
Charter School, co-ed, grades 5-8, day school, 280 students | www.kipphouston.org
Grade 5 & 6 Science Teacher/ Title I Coordinator
Scope of position included:

- Served as a team leader and science coordinator.
- Established school-wide parent involvement policies.
- Budgeted and allocated appropriate funding for federal program as Title I Coordinator.
- Actively recruited and facilitated presentations for prospective students and parents.
- Coordinated TAKS testing and scheduling; disaggregated TAKS data for strategic planning

Southwest High School, Houston, TX **August 1999 – June 2002**
Charter School, co-ed, grades 9-12, 200+ students |www.swschools.org
Chemistry/Algebra Teacher/Testing Coordinator
Scope of position included:

- Taught students in grades 9-12 in the areas of math and science.
- Developed individualized discipline management plans that were sensitive to At-Risk students.
- Sponsored National Honor Society.

DATABASE SYSTEM PROFICIENCIES

- Veracross
- PowerSchool Learning (formerly Haiku) Management System
- FOLIO Collaborative System
- DiLL Language Lab Software
- DyKnow Student Device Monitoring System
- Google for Education Programs

CAMPUS COMMITTEE MEMBERSHIPS

- Senior Administrative Team
- Curriculum Committee
- Community Service Search Committee Member (2012)
- Athletic Director Search Committee Member (2011)
- Appointed to the Diversity Steering Committee (2008)
- Admissions Committee for grades 5 and 6 (2003 – 2006)

PROFESSIONAL RECOGNITIONS and CERTIFICATIONS

Independent School Association of the Southwest (ISAS) Beginning Teacher Institute Faculty Member – Fall 2018 & Fall 2019
Carney, Sandoe, & Associates Women's Institute Faculty Honoree – Summer 2017
Independent School Association of the Southwest (ISAS) Division Head Conference Planning Committee – 2015
Independent School Association of the Southwest (ISAS) Division Head Conference Presenter – Summer 2015

National Association of Independent Schools; Aspiring Heads Program Fellow – 2012
National Association of Independent Schools; People of Color Conference Co-Chair – 2012
Columbia University, Teachers College, Joseph Klingenstein Fellow – 2006
Teacher of the Year (Southwest High School) – 2002
National Association of Independent Schools – People of Color Conference Presenter (2007)
SEED (Seeking Educational Equity and Diversity) Certified
Schools Attuned Certification
SummerCore Certification

PROFESSIONAL ORGANIZATIONS

Association of Supervision and Curriculum Development (ASCD)
National Association of Independent Schools (NAIS)
Association of Middle Level Education (AMLE)
Independent School Association of the Southwest (ISAS)
Houston Area of Independent Schools (HAIS)

SERVICE ORGANIZATIONS

Alpha Kappa Alpha Sorority, Inc.
Making It Better Guild

GENERATION 26 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed, a Texas non-profit corporation

BACKGROUND

Full Legal Name: Chelsea Pope Collins

Home Mailing Address: 1758 Santa Fe Trails Drive; San Antonio, TX 78232

Phone Number: 713-417-8888

E-mail Address: [redacted]

Business Name: St. Luke's Episcopal School

Business Mailing Address: 15 St. Luke's Lane; San Antonio, TX 78209

Business Phone Number: 210.826.8520

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: Brighter Bites

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 an educator of over 20 years in public, charter, and private schools, I have sincerely enjoyed the privilege to teach and grow alongside of my students. I am the product of the Houston public school system and a first generation college graduate whose passion for education stretches far beyond the classroom. When approached by Stuart Saunders, and after thorough research of the classical program model, I believe that my educational philosophy and skillsets align to serve students, who potentially look like and come from a neighborhood similar to that in which I grew up in. I am excited about the opportunity to offer an educational choice to families who are seeking something different.

2. What is your understanding of the appropriate role of a public charter school board member?

It is my understanding that the role of our Board is to establish goals, mission and vision, determine policies, set budgets, hire, support, and evaluate the Head of School, and to advocate for the best interest of the school and its students while serving as a liaison to the community.

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.

While I have just recently been appointed to the board of another non-profit organization, my experience in school and other non-profit leadership positions have given me access to several boards and provided me with a distinct understanding of operations and governance.

4. Describe the specific knowledge and experience that you would bring to the board.

I have served as a teacher and administrator in public, private, and charter schools for almost 25 years. I received a BS in Chemistry from Fisk University, a Masters Degree in Educational Leadership from Teachers College, Columbia University, and am currently pursuing a doctorate degree from Texas A & M in Educational Administrative Leadership. I have a solid knowledge base of educational practices and policies, curriculum and instruction, and professional development and growth. Additionally, I have great experience analyzing data and developing strategies to increase student achievement. I feel confident that my cumulative experiences, though predominantly in private schools, will serve as an asset to our board. I will contribute by ensuring that we are fulfilling our mission and making educationally sound decisions that are in the best interest of the school.

SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

Heritage Classical Academy will provide a focused classical education to a diverse community of K-8 scholars by developing their knowledge to a state of wisdom (sapientia) and character to a state of virtue (virtus) and by preparing them to become well-educated, self-governing citizens and leaders for the next generation.

Most mission statements serve as a proclamation for the school's commitment to their student body. True to its purpose, our mission is our professional and personal steadfast promise of educational excellence and a commitment for student achievement.

We believe that our program will develop in our students the required academic skills and prepare their hearts with the necessary values for a successful journey ahead. We affirm that while receiving a classical education, our students will learn to be thinkers and doers, leaders and teammates, presenters and listeners, and individuals who are well equipped to adjust to changing roles or positions.

2. What is your understanding of the school's proposed educational program?

Heritage Classical Academy's educational program teaches classical content and skills with a strong emphasis on scientifically-based reading instruction and the Singapore math curriculum. Students will explore and be exposed to classical literature using primary and diverse sources and classical languages, such as Latin. Our program will teach, reinforce, and model values through a commitment to character education to the development of virtues. The curriculum, by purpose and design, positions students toward mastery of the fundamental tenets and intellectual and cultural traditions that have been developed and refined over many generations.

Heritage Classical Academy recognizes the difference between knowledge and wisdom. It is not our intent to simply produce intellectually competent students. We believe that through experiences (observation and application), our students will gain wisdom to appreciate the learning process, understand the value of knowledge, apply those skills to become positively contributing citizens and leaders within and beyond their community. At the conclusion of the students' journey, is our commitment that students will be well-positioned academically, socially, and emotionally to compete and excel among students from all backgrounds.

3. What do you believe to be the characteristics of a successful school?

Serving as an educator for almost two decades, I believe that each school has unique characteristics that delicately contribute to the specific culture and success of its campus. In that vein, one of the most essential practices and conditions is strong school leadership that promotes continuous improvement through reflection, accountability, and growth. The professional capacity of the faculty and staff is also a key factor for creating and maintaining successful schools. The team needs to be well-trained and well-supported to hold students to the highest standards. Additionally, parent-school relationships are important as they foster the necessary partnerships to improve and support student achievement. Perhaps, equally significant are community partnerships as they contribute to creating a safe learning environment that encourages critical thinking, appropriate civil discourse, and a respect for diversity and inclusion.

4. How will you know that the school is succeeding (or not) in its mission?

Heritage Classical Academy's success will be predicated by its relentless efforts to create a learning culture that engages and challenges students to have excellent reading and mathematics skills and character development. The school will achieve a rating of "A" on state accountability by obtaining high-percentages of proficiency on state (and national) assessments. Long-term, it will be evident that the school is succeeding when graduates are accepted and enrolled at excellent public and private schools, and then matriculate to college or career-oriented work.

Financially, the school sustaining its operating budget and growth projections, including low teacher and student attrition rates (producing a wait list), will also serve as a measure of success. While these indicators will provide tangible quantitative data, qualitative data such as positive testimonies and increased community engagement will be factors that define the school's success.

GOVERNANCE

1. Describe the role that the board will play in the school's operation.

Of the many responsibilities of the board is tasked, school operations is not an area in which the board should be involved.

2. How will you know if the school is successful at the end of the first year of operation?

There are four primary metrics that will serve as indicators of success.
- Student Achievement: The students will meet (or exceed) the basic expectations of standardized testing and state mandated assessments.
- Learning Environment: The school has created a challenging, safe, and positive learning environment for students and faculty/staff.
- Finance: The school will operate within its budget.
- Compliance: The school will operate and abide by all statutory, regulatory, and contractual policies, guidelines and mandates.

3. How will you know at the end of four years if the school is successful?

In addition to the metrics noted above, the school will continue to thrive by achieving increased student performance outcomes (state accountability rating of "A"); growth in enrollment and community engagement; low teacher and student attrition rates; financial surplus; and an upstanding and positive reputation within the community.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

In my experience, strong leadership has proven to be the greatest predictors of success. I believe the board will need to ensure that it employs the "right" Head of School and holds him/her accountable. It will be the Head of School's responsibility to then ensure that the school is furnished with the "right" people who will promote the mission and vision on the school. Beyond employing and supporting our sole employee, the board will need to hold itself accountable for learning and implementing best practices in the area of governance.

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?

In an effort to preserve the integrity of the board and its work, it would be necessary to conduct a review of the facts to determine any violations of Code of Ethics and Conflicts of Interest policies or by-laws. If needed, legal counsel should be consulted, and the necessary and appropriate should be quickly rendered.

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 have known one of the board members, Stuart Saunders, prior to the conception of the board. Both he and his wife, Farrell Saunders, were parents of 4 children at the school in which I previously served as an administrator.

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, owners, directors, or agents of that provider.

◉ Not applicable because the school does not intend to contract with an education service provider or school management organization.

○ Yes

◉ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

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.

N/A

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.

KIPP 3D Academy
2002-2003
Houston, TX
Classroom Teacher; Science Department Chairperson

9. Will you be employed by or contract with the sponsoring entity, the charter school, or the management 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, Chelsea Pope Collins

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

Date 1/15/2021

DEBORAH L. ISABELLE
Notary Public, State of Texas
Comm. Expires 04-22-2024
Notary ID 126492302

1/15/2021

Debra Schindler Boultinghouse
2855 Mangum Rd. B 211
Houston, Texas 77092
Telephone: (713) 865-7633 Email: [redacted]

Professional Experience

Genesis BCS – (1984-present) Founder, President
- Provides voice & data knowledge, solutions, and choices to businesses and organizations nationally and internationally emphasizing Texas. Provide solutions to all sectors of business including legal, medical, manufacturing and government.

Criterion Telephone (1980-1984)
- Sales Associate-received top volume sales award 1981 & 1982
- General Manager-opened new office and promoted to General Manager 1983 & 1984

Allied Department Store (1973-1979)
- Buyer trainee, promoted to Junior Buyer then Senior Buyer. Responsible for Financial Analysis of $24 million multiple store department revenue, P&L, vendor performance, marketing plan and product selection.

Education

Ohio State University – (1968-1972)
Bachelor of Business Administration – Business Communications
- Chi Omega Sorority, Recruiting Director 1971
- Women's Panhellenic Board 1971
- Theatre productions of Lysistrata and Hamlet-actor, 1970, 1971

Central Catholic High School – (1964-1968) Norwalk, Connecticut
- Track Varsity Letterman - 2 year
- Honors recognition – 3 year

Professional Licenses, Memberships and Acknowledgments

Genesis BCS- HUB Certified
Genesis BCS- WBEA certified
BBB awards for Excellence - 2015
Shoretel Customer Satisfaction Award – 2010, 2011, 2012, 2013, 2014
"Fast 100" award for the fastest 100 growing woman owned company - 2014
"Fastest Growing Technology Company" - Houston 2014
"Top 25 fastest-growing women-owned Business" – Houston 2014
"Fast Tech 50-13th place-2010
"Woman Business Owner of the Year Top 10-2009
Ernst & Young, Entrepreneur of the Year Finalist Award – 2009
Goldman Sachs Graduate with Honors-Cohort 4 – 2012 various charities supporting & benefitting Houston area UMDF affected children & their families.

Philanthropic and **Community Activities**

United Mitochondrial Disease Foundation, UMDF – local chapter 2000 – 2010

President of the Board, supported affected children and their families with multiple fundraisers per year: 5K walk and Fun Run, Cocktail reception, Children Art Auction, Assorted private dinners with national board; Camp for All, Psychological support for families and children by age and gender, Social events, Grand Rounds for families and doctors,

UMDF- national board-2008-2011

- Planned and implemented International database od symptoms and diagnosis to assista all physicians nationwide with identifying mito disease
- Planned fund raising efforts and schedule
- Planned national conference and scientific event coordinated with family event

Houston Livestock Show & Rodeo

- Steer Committee Fund Raising 1997-2002

The Professional Group
Professional organization of women in leadership, Houston
Treasurer 2007
President 2008

PROW Women
Active women's networking and support women's business forum
Founder 1990
President 1990, 1991

PWEG
Women's business referral organization
President 2014
Member since 1993

HBN
Houston Business Network
Board 2017, 2018, 2019, 2020

Second Baptist Church

GENERATION 26 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage ED, dba Heritage Classical Academy

BACKGROUND

Full Legal Name: Debra S. Boultinghouse

Home Mailing Address: 1721-1 Nantucket Drive

Phone Number: 713-542-0507

[redacted]

Business Name: Genesis Telecom Inc, dba Genesis BCS

Business Mailing Address: 2855 Mangum Drive, Houston, Tx 77092

Business Phone Number: 713-865-7633

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: United Mitochondria Disease Foundation

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

1. What was your motivation to serve on the board of the proposed charter school?

My aunt taught K-12 in a one-room school house for 10 years. Those students had life sucess because of their ability to read, write, analyze and make logical decisions. She was a dedicated, highly organized professional who was passionate about teaching children.

My sister is a superintendent of schools and has created a legacy of great teaching, training excellent teachers and administrators and most importantly taking great efforts to ensure her students get a good education. She also mentors other superintendents.

I attended Classical school for most of my K-12 years and in doing that studied Latin, French, History, Science, Literature, Phonics, etc. It was a wonderful education and I enjoyed learning to make decisions and to acquire knowledge. As a result I read constantly and still do to this day.

Today when I visit with young people in an interview format or in the different business forums I am involved in, I am aware that they are often missing facts and data that I know this classical education that our school will deliver, provides them.

2. What is your understanding of the appropriate role of a public charter school board member?

Work with Commercial Real Estate companies who can provide us the ideal space/property for our school and ensure that space is designed for maximum safety.

Work together closely as a board to understand all we can as a team for the best outcome of our combined and separate efforts.

Hire our Head of School per our job description and hold them to that document in a formal evaluation schedule. Set policies for the board and the school as well.

Operate per all state and federal laws.

Attend all board meetings.

Manage any financial aspect of the school to maintain the financial sustainability of the school. This would include the knowledge of and managing all vndor contracts.

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.

In my efforts to grow the awareness of Mitochondria Disease, I started a board and active Houston chapter that served a few hundred families. We developed a support group for children and families with the disease as well as an adult support group in Houston and San Antonio and other Texas areas.

We started two annual fund raisers and an evening with Genetics cocktail party. We had educational sessions for the patient population and their families as well as Grand Rounds for the doctors in the medical community to learn more about this disease. We also started an annual camp for Mito kids and their families around our state and other areas.

Nationally we worked on a grand software that was eventually released world-wide that allowed any approved doctor to register all the gathered information on each patient, keeping all names private, so doctors all around the world could share this resource. It proved to be helpful in diagnoses and faster research results. All of this effort was to help the children and their families.

4. Describe the specific knowledge and experience that you would bring to the board.

As a business owner for 36 years and a non-profit board member for 10 years, I have been able to acquire contacts and experiences that allow me to understand an issue, analyze needs, determine the priorities and move forward to complete the task or resolve the issue.

SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

Heritage Classical Academy will provide a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom (sapienta) and character to a state of virtue (virtus) by preparing them to make the best life possible for one's self and others.

Our goal is to train a person to be a thinker and a doer, to be a person whose senses are well-developed; to be a person who adjusts well to a changing world and who can be innovative and creative but knows there are timeless principles worth preserving; to be a person who is self-governing, self-directed and self-disciplined.

We want to shape young people who are thoughtful, kind and empathetic, but decisive and proactive.

We want our students to be moral, courageous, faithful to their principle's and to be seekers of the good and the true.

We believe that this person will be a wise, virtuous, confident and productive individual, well-positioned to lead a happy life and contribute to his or her community.

2. What is your understanding of the school's proposed educational program?

Classical approach to education:
1. Phonics K-2 (RIGGS)
2. Core Knowledge Sequence-geography, history, and science.
3. Reading in every subject stressed.
4. Original texts included in History.
5. Problem -based Math (Singapore).
6. Latin in grades 4-8.
7. Great family involvement opportunities stressed.
8. Consistent virtue and character development.
9. PE, Health, and Fine Arts are all part of a great total education and will be covered well.
10. Helping students to be successful with training in study skill-note taking, organization, and time management.
11. Encouraging our students to understand the classical content that encourages thier heart and mind to explore truths that continue to ring true to mankind and have an ongoing dialogue that addresses the ageless questions of us all.

3. What do you believe to be the characteristics of a successful school?

Our partnership with BCSI's classical education with 26 schools will be part of our success.
HCA has developed its program by combining the BCSI model with the TEA Effective Schools framework that creates:
1. Strong instructional leadership for the school community-teachers, students and parents.
2. Excellent teachers & students who know they are supported to attain high expectations via continuous improvement.
3. Stress sufficient time on task so all students learn the material.
4. A safety-driven environment that is calm, orderly and positive.

5. Daily promoting of critical thinking, appreciation of discussion with respect and love of learning.
6. A proven classical liberal arts curriculum.
7. Parent engagement in school mission, vision and core values.
8. Ongoing moral character development.

4. How will you know that the school is succeeding (or not) in its mission?

1. Grade and test results high compared to local, regional and national levels; meeting our academic achievement goals for all student groups.
2. Great love of learning and reading evident.
3. Transition to successful high school students and adults.
4. Low staff turnover.
5. High family and community involvement.
6.Growth of student and family population.

GOVERNANCE

1. Describe the role that the board will play in the school's operation.

1. Making wise and financial decisions for the short and long term.
2. Hiring CEO/Superintendent and being involved in those interviews.
3. Policy-making.
4. Know the laws regarding charter schools and ensure they are enforced.
5. Be involved in all legal contracts.

2. How will you know if the school is successful at the end of the first year of operation?

1. Excellent student achievement results for all groups.
2. Great morale with low staff turnover and high % of students returning with new students coming in.
3. Great satisfaction survey results.
4. Operating in the black.
5. Meeting all TEA requirements.

3. How will you know at the end of four years if the school is successful?

All of the above plus:
1. Waiting lists for each grade.
2. Operating budget is healthy with small surplus in revenue.
3. Positive reputation in the community.
4. "A" rating by TEA.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Remain an active disciplined board with:
1. Regular documented monthly meetings.
2. Review academic progress of students via CEO/Superintendent on a quarterly basis.
3. Review monthly financial data including student data.
4. Review security status of school on a quarterly basis.
5. Review any matter of concern to school or individual quickly for best decision and outcome.
6. Continuing education on being a good member and do a board evaluation process once a year.
7. Taking Hillsdale classes-history, ethics, logic, etc. for each board member to stay current.

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?

1. Discuss with Board Chair, Vice Chair or Secretary if it involves the Board Chair.
2. Review Conflict of Interest Policy.
3. Meet with outside counsel.
4. Discussed reported issue with board member.
5. If criminal behavior, report to he correct legal group.
6. I any unethical or illegal action has occurred or anything countering the stated conflict of interest policy, the board member involved must be asked to resign.

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.

Our current Secretary asked me to be on the board as we are both in a business group together and have known each other for 10 years.

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, owners, directors, or agents of that provider.

◉ Not applicable because the school does not intend to contract with an education service provider or school management organization.

○ Yes

○ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

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.

Genesis BCS

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 management 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, Debra Schindler Boultinghouse 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 Debra S. Boultinghouse

Date 1/12/2020

BRENDA HARVELL
Notary Public, State of Texas
Comm. Expires 08-03-2023
Notary ID 7615100

Brenda Harvell
Notary Public in and for the State of Texas

Kathryn E. van der Pol

4610 N. Shepherd Dr. •Houston, Texas • 77018

713 516-4282

Liberty Hoepfl Garage 1987-present

See attached Current Bio

St. John's School 1987-2004

- **Latin teacher**, Level III Honors and Advanced Placement students. Sponsor of Junior Classical League. Latin coordinator for the Foreign Language Department.

- **History Teacher. Taught Western Civilization and World History to 9th grade.** Formulated new curriculum (2000) in transition from Western Civilization to World History course, a curriculum that covered Egypt, Greece, Rome, the Middle Ages, the Americas, China, India, and Japan.

- **Adviser to *The Review***, the student newspaper. *The Review* was recognized as Best Overall Newspaper at a Gulf Coast regional contest in 2003 among many other awards. Responsible for interviewing and training a 40-member staff; publishing 12 issues per year, a magazine and running a summer journalism workshop.

St. Thomas' Episcopal School . . . . . 1980 - 1986

- Teacher in Lower, Middle and Upper School. Taught Latin I, II, III, IV to fifth, eighth, eleventh, and twelfth graders. Also taught Roman history and ancient Greek. Founded chapter of the Junior Classical League. Chaperoned students to national competitions in Florida and Indiana.

Writing Projects:

- Edited *The Greeks: A Great Adventure* by Isaac Asimov for Houghton Mifflin.
- Copy-edited early drafts of *The Thyroid Solution* by Dr. Ridha Arem.
- Published and edited news magazine for 1,485 residents of City of Spring Valley from 1998-2000.
- Proofreader of *October Winds* by Susan Wiggs and other books by same author.

Education and Background

Undergraduate work: B.A., Classics, 1983, Rice University

Graduate work: Summer Fellow at the American Academy in Rome, 1984;

University of Texas at Austin 1985; Rare Book School, Columbia University, 1987.

Married, three daughters; traveled abroad, including four years in Japan.

Study Grants, Awards & Professional Development

Runner up for the Outstanding Teacher of the Humanities Award (TCH); 2003.
University of Missouri, School of Journalism, Summer Internship, 2002.
Fellow, Woodrow Wilson Workshop on Comparative Modernization of China & Japan, Rice University, 1994.
NEH grant, "Polis and Res Publica," 1990.
Outstanding Teaching Award, Houston Area Teachers of Foreign Language, 1985. Fellowship, Classical Association of the Mid–West and South's Fellowship to Rome, 1984.
Winner of the American Classical League Scholarship to Rome, 1984.

Sample of public lectures

"Making the Case for Latin," University of Houston.

"Civic Virtue in a Latin Class," International Society for the Classical Tradition, University of Tubingen, Germany.

"Pompeii and Herculaneum Revisited," Docents of Bayou Bend.

"Humanistic Manuscripts of the 15th Century," annual meeting of Texas Classical Association.

GENERATION 26 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

BACKGROUND

Full Legal Name: Kathryn Eaves van der Pol

Home Mailing Address: 4610 N. Shepherd Dr.

Phone Number: 713 516 4282

E-mail Address: [redacted]

Business Name: VDP Enterprises LLC

Business Mailing Address: 4610 N. Shepherd Dr.

Business Phone Number: 713 695-5071

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 have always wanted to start a school. As a former educator for 24 years, teaching and learning have been in my blood. I grew up traveling, as my father was in the Navy, so I attended over 21 schools before I graduated from college. All these experiences, have fueled my desire to start a school.

Then, when I learned of the Barney Charter School Initiative, I took action. I began visiting some BCSI schools then I decided I wanted to start a Founders Board. My husband and I attended a program at Hillsdale College to train potential school founders in 2017. We were very impressed with the curriculum and the program. Through a series of fortuitous circumstances, I met Stuart Saunders when we returned to Houston, and we formed this board.

As a teacher at a private school, I always believed that the type of classical education we provided should be offered to students in public schools. The students we helped the most in the private school were those in the middle of the class. The students at the top would be at the top anywhere, but the students in the middle, I saw how our curriculum took them to a higher level. I believe the education that Heritage Classical Academy provides will do the same.

2. What is your understanding of the appropriate role of a public charter school board member?

The role of the board member is vital to the success of the school. Board members should make sure the mission, vision and principles of the school are properly being implemented by the Head of School and faculty. The board hires and evaluates the performance of the Head of School. They ensure that the public money is responsibly spent and accounted for, and they should make sure that we are providing the support and culture where students as a whole thrive in all areas of our responsibility. The board chooses the facilities and makes sure the facilities are more than adequate to meet the students' needs.

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.

As the founder and current president of the North Shepherd Community Alliance, a non-profit dedicated to improving the community, we have undertaken many projects from community clean-ups to Christmas toy drives, to rectifying community problems such as crime, loitering, public drunkenness, and working with the proper authorities to repair and upgrade infrastructure.

I also serve on the boards of the Automotive Service Association, Houston Chapter and and am the incoming President of the Automotive Service Association - Texas. In the past I served on the Board of Directors of the Greater Heights Chamber of Commerce, and am a past President of the Professional Women's Exchange Group. I am a team player, love the planning and execution of challenging goals.

4. Describe the specific knowledge and experience that you would bring to the board.

I have 24 years of teaching experience and 15 years of business experience. I taught Latin, ancient history, World Civilization and my degree is in Classics so I have a very good knowledge and lots of experience with a classical curriculum which will be helpful in staying mission true. As a business owner, my experience in hiring and training people, establishing policies and procedures, and monitoring the financials should prove to be useful to the board.

SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

Our Mission Statement:Heritage Classical Academy provides a focused classical education to a diverse community of scholars by developing their knowledge to a state of wisdom (sapientia) and character to a state of virtue (virtus) and by preparing them as well-educated self-governing citizens and leaders for the next generation of America.

2. What is your understanding of the school's proposed educational program?

Our curriculum is based on the Hillsdale College Barney Charter School curriculum. It is the type of curriculum that encourages early literacy through phonics and is generally based on the great

works of literature and philosophy. Most adults in their 70s today had this type of education when they were in grade school. So in the earliest grades, we will be teaching children to read using phonics. Students will have regular instruction from Kindergarten in science, world history, art, and music. They will also study geography and history. We will use the Singapore math program. As students progress, they will read whole books, read poetry, and learn grammar including how to diagram a sentence. In middle school, students will study Latin, U.S. History, Texas history, and more advanced earth and life science, and Algebra.

3. What do you believe to be the characteristics of a successful school?

Children are enthusiastic about school and are eager to learn.
Children are advancing academically and adults can see them develop into civilized, articulate, and caring humans.
Great teaching faculty with high morale.
Engaged parent community that volunteers and supports the school's mission and vision.
Everyone takes pride in their school, evidenced by high levels of participation, how the community speaks of itself; how they take care of the physical facility; most importantly, how well students and teachers do their work. Everyone is doing well and supports each other.

4. How will you know that the school is succeeding (or not) in its mission?

You would see how well the school is succeeding in its mission by visiting the classrooms and observing the teachers and students fully engaged and following the curriculum as established. You would also see this in the quality of the students' work.The results of the state test scores will show that all sub-groups are meeting targeted goals. The national test results will provide comparison about how well our school compares to others.

GOVERNANCE

1. Describe the role that the board will play in the school's operation.

There are four pillars of responsibility that belong to the board: Finance, Educational Achievement, Environment, and Compliance. Specifically, as a board we are to:
I. Work to safeguard the school's resources from fraud, waste and abuse, remain within budget.
II. Overesee the educational achievement of the school's
(1) Absolute performance, (2) Relative performance, (3) Mission-specific outcomes, and (4) Student gains.
III. Ensure a safe, healthy and positive environment for students and employees.
IV. Operate within all statutory, regulatory, contractual and policy guidelines.

2. How will you know if the school is successful at the end of the first year of operation?

We will know if we are successful at the end of the first year if:
1. we maintain a high morale among staff, students, parents, and the Board, based on a variety of data including surveys where appropriate.
2. we operate financially in the black.
3. our enrollment shows over 90% of the current students returning.
4. assessments show significant student growth.

3. How will you know at the end of four years if the school is successful?

After four years I will consider us successful if in addition to doing well on the items listed above:
1. We have a waiting list for students in each grade.
2. We are performing well on state and national tests.
3. We have not had to replace the head of school.
4. We are making a positive impact on the local community.
5. We retain our best teachers and staff and cultivate a climate of eagerness among applicants to be part of our school.
6. We are rated by TEA as an "A" school on its scale.
7. We possess a small surplus in revenue.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

1. Hire an outstanding Head of School and surround him/her with the proper support.
2. Monitor finances and fund raise to make sure the school is well-supported financially.
3. Know the district, state, and federal policies the school is obligated to and make sure that the school stays in compliance with all policies.
4. See to it that the education plan is producing the outcomes we want.
5. Our teachers and staff salaries are sufficient to retain high quality staff.

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?

Notify the President of the Board, or if the unethical behavior is coming from the President, then notify the Board Secretary. Take action to verify the unethical behavior. Depending on the nature of the situation, determine the necessary remediation. If the situation is serious, then the board should determine the consequences, including if necessary, removing said person from the school board.

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 was friends with two board members prior to their joining. We also have done business with each other and one is in a business group that I belong to. My husband is also friends with them.

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, owners, directors, or agents of that provider.

- (•) Not applicable because the school does not intend to contract with an education service provider or school management organization.
- ( ) Yes
- (•) No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

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.

VDP Enterprises, LLC
VDP Properties, 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.

This is my second year as a board member with Heritage Classical Academy. This is my only experience with charter schools.

9. Will you be employed by or contract with the sponsoring entity, the charter school, or the management 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, Kathryn van der Pol
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 Kathryn van der Pol

Date 1/13/2021

NOTARY PUBLIC STATE OF TEXAS
BRENDA HARVELL
Notary Public, State of Texas
Comm. Expires 08-03-2023
Notary ID 7615100

Brenda Harvell
Notary Public In and for the State of Texas

E. F. Mano DeAyala
2229 San Felipe, Suite 1000
Houston, Texas 77019
Telephone: (713) 225-4500 [redacted]

Professional Experience

Buck Keenan LLP. (2010- present). Partner
- Serve as counsel to individuals and companies in various industries.
- Represents clients in domestic and international commercial, real estate, energy, construction, and corporate governance matters.

Thompson & Knight, LLP. (1994-2010) Associate – 1994-1999; Partner – 1999-2010
- Served as counsel to individuals and companies in various industries.
- Represented clients in domestic and international commercial, real estate, energy, construction, and corporate governance matters.

McFall & Sartwelle, PC. (1992-1994) Associate
- Served as defense counsel for clients primarily in matters involving products liability, medical malpractice, legal malpractice and other professional liability.

Oryx Energy, Inc. (formerly, Sun Oil Company) (1989) Financial Analyst
- Performed financial analysis of domestic and international business units.

Education

Southern Methodist University Dedman School of Law - Juris Doctor 1992
- Student Senator 1991

University of Texas at Austin – Bachelor of Business Administration – Finance 1998
- Deans Honor List, Fall 1985
- Sigma Phi Epsilon Fraternity - Recruiting Director 1986; Chaplain 1986-87; Vice President 1987-88
- Texas Cowboys Service Organization - 1987-88

Professional Licenses, Memberships and Acknowledgments

Licensed State Bar of Texas; 1992 – present.
Licensed Solicitor England and Wales; 2010 – present.
AV Preeminent by Martindale-Hubbell; 2002 - present.
Recognized in Best Lawyers® in America (Real Estate Litigation); 2011 – present.
Texas Super Lawyers® (Business Litigation); 2011 – present.
Texas Super Lawyers® Rising Star, 2004-06.
Best Lawyers in Houston.
Life Fellow Houston Bar Foundation.
Life Fellow Texas Bar Foundation.

Philanthropic and Community Activities

Childrens Fund (2000-2005)

- Fundraising organization supporting various charities benefitting Houston area children .

Spring Branch Memorial Sports Association (Board Member 2012-present)

- Vice President; 2014-2017.
- Capital Campaign Co-Chair; 2019 – present.
- Youth Football Coach; 2002-2018.

Hispanic Leadership Alliance; Board Member 2012-present; Chair 2018-present.

Spring Branch Independent School District

- Finance Committee; 2014
- Long Range Facilities Committee; 2016-17
- Budget Committee; 2017

Texas Board of Criminal Justice; 2017 – present.

- Chair, Business and Financial Operations Committee, 2020
- Chair, Community Corrections Committee; 2017-2019

Windham School District; Trustee 2017-present.

- Served on the Strategic Planning Committee and as part of a three-member committee to recruit and hire senior leadership including a nationwide Superintendent search.

C Club of Houston 2012-present

- Executive committee (Treasurer 2015; Vice President 2016; President 2017, PAC Treasurer 2019)

Engage Texas; Chair 2019 – 2020.

- Organization primarily focused on voter registration in Texas.

United States-Mexico-Canada Agreement ("USMCA"); 2020- present

- Appointed by the United States Trade Representative, Executive Office of the President to serve as panelist to arbitrate disputes between the Parties.

Memorial Drive Presbyterian Church

GENERATION 26 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed, a Texas non-profit corporation

BACKGROUND

Full Legal Name: E. F. Mano DeAyala

Home Mailing Address: 11403 Shadow Way St., Houston, Texas 77024

Phone Number: 7132254500

E-mail Address: [redacted]

Business Name: Buck Keenan LLP

Business Mailing Address: 2229 San Felipe, Suite 1000, Houston, Texas 77019

Business Phone Number: 7132254500

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: Windham School District

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 have been involved with our local ond). I also coached youth football for 17 years and mentored students from various schools throughout Houston. I have been an active board member of the Spring Branch Memorial Sports Association for 10 years serving more than 8,000 youth athletes annually. Most recently I have been a trustee of the Windham School District serving offenders in the state prison system. At Windham, I was very involved in the 2019 selection of the Superintendent and in 2018 the Director for Instruction. I participated in the Windham's conference where their 5-year plan was established. I have learned that more opportunities for quality education is a good thing and my experience is additive to such an effort, especially in northwest Houston.

2. What is your understanding of the appropriate role of a public charter school board member?

The board member role is to make sure the mission and vision of the school is pursued and achieved. The board selects the CEO/Superintendent and assists in his/her work to achieve those goals. The board has oversight of the implementation of the education curriculum, facilities, budget and finance. The board ensures that monies are spent efficiently and effectively.

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.

See # 1. In addition to my direct school experience, my law practice is diverse and I have handled many real estate and commercial transactions as well as employment matters and other disputes including those involving school law. Over the past 10 years, I have served on the executive committee and Vice President (4 years) of the Spring Branch Memorial Sports Association which serves over 8,000 youths participating in 6 sports programs.

4. Describe the specific knowledge and experience that you would bring to the board.

See # 1 and #3. I have extensive experience recruiting, interviewing and selecting educators, coaches and administrators. I have served on several boards, some of which I have chaired, and I am familiar with the roles of board members, executive staff and employees.

SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

Heritage Classical Academy will provide a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom and character to a state of virtue and by preparing them as well-educated, self-governing citizens and leaders for the next generation of America.
A school/academic setting is ideal to train the mind and heart to make the best life possible for one's self and others.

2. What is your understanding of the school's proposed educational program?

HCA will offer a classical education with an emphasis on reading, language, phonics, math, history, science and Latin based on the Hillsdale College classical curriculum.

3. What do you believe to be the characteristics of a successful school?

There are several characteristics of a successful school. Some are:
- outstanding leadership;

- competent and dedicated educators;
- providing a welcoming and supportive environment that encourages the students' effort to succeed in the curriculum
- students are eager to learn and all students achieve at high levels;
- the school accomplishes its student outcomes which the school was chartered to produce; and
- the school operates within its budget.

4. How will you know that the school is succeeding (or not) in its mission?

The school will be succeeding in its mission if student participation, enthusiasm and ultimate outcomes, including testing, are achieved. Success will also be seen through graduating students who are confident, virtuous, independent and concerned for others.

GOVERNANCE

1. Describe the role that the board will play in the school's operation.

First is to do no harm. The board is to hire CEO/Superintendent, set policy and provide support and oversight. The board will not be involved in the day to day education efforts which will be left to the CEO/ Superintendent of School and staff who will operate the school within the policy guidelines set by the board.

2. How will you know if the school is successful at the end of the first year of operation?

HCA will have retained a qualified and inspiring CEO/Superintendent and educators. We will have displayed financial prudence and accountability and operated within our policy objectives. Success will be apparent if students achieve their educational goals and return the following year.

3. How will you know at the end of four years if the school is successful?

In addition to #2 above, HCA will see increased demand from the community. Also, the school will receive and "A" rating from the State due to excellent academic performance by all subgroups.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Set policies consistent with educational curriculum established by the board. HCA retains the right CEO/ Superintendent and holds him/her accountable to HCA's policy objectives, as established by the board. Financially, HCA should operate prudently and within established budgets.

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 seek legal advice and see that the facts were investigated and if the beliefs were substantiated, take action to remove the member from the board. I would seek legal advice as to the conduct, especially if criminal, and report the action as required.

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, owners, directors, or agents of that provider.

◉ Not applicable because the school does not intend to contract with an education service provider or school management organization.

○ Yes

◉ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

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.

Buck Keenan LLP
E F Mano DeAyala PC
EFD Investments, I, GP
EFD EC Fund XI LLC
1629 HWY 3 5 Rockport, 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 management 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, E.F. Mano DeAyala

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

Date 1/5/2021

ELIZABETH MYERS
3578391
NOTARY PUBLIC, STATE OF TEXAS
MY COMMISSION EXPIRES
MARCH 14, 2024

Elizabeth Myers
Notary in and for the State of Texas

Richard T. Hendee
24703 Mather Drive, Katy, Texas 77494
Home: 281.392.0324
Cell: 281.217.4231
E-MAIL: [redacted]

~FINANCIAL SERVICES PROFESSIONAL~

Self-motivated, analytical, detailed, proven leader, Senior Level Executive with over fifty-years of diverse experience in the financial services industry. Experienced in commercial, high net worth individual, work-out and restructure and consumer lending, product development and roll-out, marketing and sales, budgeting, administration and asset/liability management for leading financial institutions such as Bankers Trust, First-City Texas, Texas Commerce-Chase, as well as several Community Banks. Have utilized analytical skills to identify and assess situations to develop innovative solutions which resulted in accelerated growth and profitability. Possess the ability to see the big picture and also develop the infrastructure to expand or increase market presence. Use management style expertise to achieve the respect of supervisors, peers and staff, which has afforded the opportunity to maximize resources and build a team environment. Actively involved in the community and take leadership roles in organizations. Currently a small business owner helping other small and mid-size businesses with financial and general business advise, consulting and mentoring.

CORE COMPETENCIES

- Effective Negotiator
- Skilled Decision-Maker
- Strong Analytical Skills
- Self-Motivated
- Relationship-Builder
- Proven Leadership Skills
- Strategic Thinking Skills
- Excellent Organizational Abilities
- Logical and Ethical
- Extensive Financial Service Industry Knowledge
- Calm, Authoritative Leader
- Revenue Generator
- Excellent Management Techniques
- Responsible Steward
- Budget Development and Management Skills

HIGHLIGHTS OF ACHIEVEMENTS

Increased the market presence of a branch of a multi-million-dollar community bank, located in a large metropolitan city. ***RESULT:*** Loans increased by 300% and deposits jumped 430% in less than 18 months. Profitability also increased 83% during the same time period.

Richard T. Hendee

Spearheaded the conversion of a non-profit entity to a for-profit corporation so it could extend its market operations outside the state of Texas. ***RESULT:*** Expanded into seven states, which increased outstanding loan volume incrementally by over $60.0 million during the first two years.

Expanded two product lines of business with the second largest bank in Texas by creating innovative Policies and Procedures, pricing, document flows, and collection systems. ***RESULT:*** Went from virtually no business to becoming the seventh largest automobile financing entity in Texas with all administrative policies in place to meet current and future needs and requirements.

Accelerated the customer base and retained experienced staff during two mergers and acquisitions. ***RESULT:*** Never lost a single major account or staff member, which kept our talent in place, thus reducing possible expenses. Created new administrative policies for the new organization. Kept customer base comfortable with the new organization in order to not lose business, but to grow it.

Developed a new small business banking group and established collaboration with virtually all internal departments and senior management. ***RESULT:*** During the succeeding five years, generated over $200.0 million in new loans and over $300.0 million in new deposits.

Built policies, procedures and administrative flows, formalized fund-raising activity, created the Board of Directors structure. ***RESULT:*** This charitable organization created by a local TV personality went from virtual start-up to $1.2 million in assets and generating approximately $525.0 thousand in donations annually.

Directed the creation of government student lending departments at three different institutions. ***RESULT:*** Generated student loan volume of over $2.0 billion.

BOARD EXPERIENCE

Richard has a long history of serving in leadership capacities in the non-profit and community sectors and has held the positions of Director, Officer, or President with over 30 different organizations. Currently, he is the Chairman of the Silver Fox Advisors and President of the Linda Lorelle Scholarship Fund. He was the first non-attorney to Chair a State Bar of Texas Committee and a local Houston State Bar Grievance Committee. He is also a life member of two public service entities. Richard has received numerous awards for community involvement and leadership including the Independent Bankers Association of Texas' President's Award.

Richard current sits on six small business advisory boards and he has conducted training sessions for non-profit boards of directors and trustees.

PROFESSIONAL EXPERIENCE

First National Bank, Houston, Texas
2007-Present
Branch President

- In charge of total Branch performance including asset and liability growth, loan portfolio performance profitability, community involvement, business development, relationship building, staffing and operations.
- Create business plan, operating budgets and performance standards.
- Participate in internal and external events to create maximum positive exposure for the bank.
- Coach and train lending and operational personnel in order to achieve bank, branch and personal goals.
- Develop, maintain and service a portfolio of commercial banking relationships.

Nelnet, Inc., Bryan, Texas
1995-2007
Senior Vice-President

- In charge of accelerating asset growth, developing new products and services, and expansion of market share, market presence and geographical reach.
- Responsible for developing marketing and sales strategy plans, creating asset volume and expense budgets.
- Took the lead in directing the overall operation of the company.
- Monitored business activities, met with clients and prospects, and implemented discussion with key individuals.
- Coached marketing and sales team personnel and reviewed actual results to plan and budget.
- Developed, maintained and expanded relationships with financial service providers and trade associations.
- Established, negotiated and maintained lines of credit with financial institutions.

Texas Commerce Bank (now Chase), Houston, Texas
1993-1995
Senior Vice President

- In charge of developing products and services and formulating asset growth projections and expense budgets.
- Responsible for growth of assets in two separate lines of business.
- Monitored and analyzed business development activity and expenses.
- Directed and coached a twenty-person sales and marketing team.
- Established and maintained relationships with key prospects and clients.
- Took a leadership role on the division's strategic planning committee.

First City National Bank, Houston, Texas
1980-1993
Senior Vice President

- Responsible for the development of small business and consumer financial products.
- Oversaw the analyzing, underwriting and approval of loan assets and managed a staff of over one hundred people.
- Spearheaded the growth of small business and consumer (direct, indirect and Mexican National) financial relationships.
- Measured actual results to plan and budget and implemented actions to assure growth of loans and deposits.
- Developed and instituted small business lending and asset quality monitoring policies and procedures.
- Established a department to comply with the Community Reinvestment Act.
- Generated, maintained and serviced a portfolio of commercial banking relationships.

First National Bank – Ithaca, New York
1979-1980
Senior Vice President

- Oversaw the small business and consumer lending functions.
- Served as a small business lender.
- Developed Small business relationships.
- Directed the student lending function.
- Established an SBA Lending Department

Bankers Trust Company – Binghamton, New York
1977-1979
Vice-President

- Managed the Main Banking Office.
- Performed small business and consumer lender functions.
- Served as marketing Director.
- Worked as a Special Assistant to the President.

Owego National Bank - Owego, New York
1976-1977
Assistant Vice-President and Assistant Trust Officer

- Served as a Business Development Officer.
- Performed Note Department Head duties.
- Worked as the Marketing Director.
- Served as a consumer lender.

U. S. Treasury Department – Comptroller of the Currency – New York, New York
1973-1976

- Served as an Assistant National Bank Examiner – Assigned to New York Office
- Performed the detail for examination of National Banks
- Provided assistant to the Examiner-In-Charge of National Banks

First National Bank in Sidney – Sidney, New York
1967-1973

- Created an indirect consumer lending department
- Developed commercial banking relationships with dealers
- Served as a Branch Manager
- Directed all teller and currency operations

EDUCATION

First City National Bank Credit Training Program 1980 – 1982
Extensive accounting, credit and economic college level courses taught by University of Houston Business School Professors.

U. S. Treasury Department – Comptroller of the Currency 1973-1978
Numerous Federal Banking Law courses taught by U. S. Treasury Department Comptroller of the Currency Senior Level Examiners and/or Department Heads.

New York State Banking Department Bank Management School – 1971-1972
All aspects of bank management courses held on the campus of West Point Military Academy, West Point, New York.

American Institution of Banking – Advanced Banking Certificate 1967-1973 and 1977-1980 Courses included: Money and Banking, Bank Public Relations and Marketing, Trust Department Organization, Supervision and Personnel Administration, Principals of Bank Operations, Real Estate Finance, Management Policies for Commercial Banks, Management Theory and Practice, Sales and Business Development and Managing a Sales Force.

Sidney Central High School – Sidney New York Graduated in 1966.

References provided upon request.

GENERATION 26 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed, a Texas non-profit corporation

BACKGROUND

Full Legal Name: Richard T. Hendee

Home Mailing Address: 2839 Park Hill Dr. Katy, Texas 77494

Phone Number: 281-392-0324

E-mail Address: [redacted]

Business Name: Horizon Associates, Inc.

Business Mailing Address: P.O. Box 55 Katy, Texas 77492

Business Phone Number: 832-437-3089

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: Linda Lorelle Scholarship Fund, Inc.

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

1. What was your motivation to serve on the board of the proposed charter school?

Provide my business and professional experience and expertise to an organization that seeks to provide a classical education to young people who can use the education that they receive to improve their lives and the lives of the individuals around them.

2. What is your understanding of the appropriate role of a public charter school board member?

Provide leadership, guidance, oversight, direction and support to fellow Board Members, Administrative Staff, Teachers, School Financial Donors in a business and professional manner so that the School can achieve its Mission, Vision, and Goals.

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 served on the Board of the Linda Lorelle Scholarship Fund, Inc. for more than 20 years and I have been the President of the organization for 15 of those 20 plus years. I have also served on the Board of some 30 non-profit organizations in the education, affordable housing and financial services space.

4. Describe the specific knowledge and experience that you would bring to the board.

Board membership. Board structuring. Board member training. Board formation. In-depth financial experience. Fundraising for non-profits.

SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

Provide a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom and character to a state of virtue and by preparing them as well-educated self-governing citizens and leaders for the next generation of America.

2. What is your understanding of the school's proposed educational program?

The education, training and experiences that the academy's student will receive will enable them upon graduation to enter the world better prepared and knowledgeable for whatever challenges in life that they may experience. Further, they will be positioned to seek higher education in the form of a a college degree or technical training that will enable them to realize their dreams and experience a better and enriched life.

3. What do you believe to be the characteristics of a successful school?

When the students that graduate from the school leave with the skill set and formal education whereby they can continue on in their education and life and achieve their dreams of a better life despite circumstances beyond their control that may be preventing them from achieving their potential.

4. How will you know that the school is succeeding (or not) in its mission?

When the students that have graduated from the School go on to continue their education by first completing their high school education and then obtaining higher education or receive technical training and experience success in their lives and then return to the School to provide the next generation of students with guidance and support so they can achieve what the returning students may never have thought possible.

GOVERNANCE

1. Describe the role that the board will play in the school's operation.

The Board is the governing body of the School. The Administration will be charged with the day-to-day operation of the school and it is the Board responsibility to measure the success of the school and hold the staff responsible for the performance. The Board should hire the right CEO/ Superintendent/Head of School and provide the tools to succeed and then let the staff do what they have been empowered to do. The Board should not be micro-managers.

2. How will you know if the school is successful at the end of the first year of operation?

If the individual goals and objectives established during the formation of the school have been met or satisfactory progress is being made. Operationally the school is functioning properly with few missteps. The budget was met. Community support and engagement is increasing. Enrollment is at targeted levels. All student groups are achieving at high levels.

3. How will you know at the end of four years if the school is successful?

If the individual goals and objectives established during the formation of the School have been met. The vast majority of all students are continuing to make progress in achieving their advancements to the next grade. The community expands their support and involvement with the School. Board and staff turnover are minimal. Operating budgets are met. The School is rated an "A" by the State of Texas.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Establish a set of measurable goals and objections that are designed to enable the school to be a success and then evaluate the progress toward achieving those goals and objectives on a quarterly bases. Make changes and modifications, if needed, to enable the school to be successful.

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?

Face the situation head on and perform an investigation to determine what actually happened or did not happen and the actions taken and/or not taken by the individual(s). Conduct an evaluation of the situation and take appropriate action(s) needed to protect the school and all parties involved.

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.

Business and professional association with Stuart Saunders and Kathryn van der Pol.

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, owners, directors, or agents of that provider.

- (•) Not applicable because the school does not intend to contract with an education service provider or school management organization.
- ( ) Yes
- ( ) No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

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.

Richard T. Hendee dba Horizon Associates, Inc. 100.0% Owner
Small Business Superstore, Inc. 100.0% owner

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 management 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, RICHARD T. HENDEE

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 Richard T. Hendee

Date 1-12-21

BRENDA HARVELL
Notary Public, State of Texas
Comm. Expires 08-03-2023
Notary ID 7615100

Brenda Harvell
Notary in and for the
State of Texas

STUART D. SAUNDERS

602 Sawyer Street, Suite 720
Houston, Texas 77007
Telephone: (713) 914-9778 Email: sdsaunders@missionheights.net

SUMMARY

Career experience in both legal and banking fields with executive responsibilities ranging from private law practice to bank general counsel to private investment management and various boards of director positions. Legal practice focused primarily on banking and commercial financing transactions. As Senior Vice President and General Counsel at Prime Bank, led a division of over 60 employees and managed legal and transactional activity such as mergers, acquisitions, asset sales and the company's initial public offering. Currently serve as Chairman of SouthTrust Bank, on the board of directors at First State Bank Odem and as managing partner at Mission-Heights Enterprises, Ltd.

PROFESSIONAL EXPERIENCE

Mission-Heights Enterprises, Ltd. (2000 – present). Managing Partner.
Serve as co-manager of a private-equity limited partnership.

- Primary responsibilities include asset management and financial administration.
- Review the partnership's investment performance and evaluate new investment opportunities.
- Perform general counsel responsibilities.

First State Bank of Odem. (2012 - present). Director.
First State Bank of Odem is a banking institution with four locations in south Texas and approximately $150,000,000 in assets. Joined the board of directors in June of 2012. Also serve on the board of directors of the bank's holding company.

SouthTrust Bank, N.A. and Live Oak Bancshares, Inc. (2003 – present). Director and Chairman.
The SouthTrust Bank is a banking institution with seven locations in Texas and approximately $420,000,000 in assets. Elected to the board of directors in 2003 and elected as Chairman of the Board in 2007. Currently serve on the bank board and as Chairman of the holding company board.

Institute for Shipboard Education – Semester at Sea (January – May 2012)
Assistant Executive Dean – Spring 2012 voyage.

The Saunders Foundation (1998 – present).
Serve as a director and manager of all foundation business including its asset management and philanthropic activities.

Institute for Shipboard Education – Semester at Sea (August – December 2000)
Field Office Coordinator – Fall 2000 voyage.

Prime Bank and Prime Bancshares, Inc. (1994 – 2000). Senior Vice President and General Counsel.
Served as head of the Legal and Loan Services Division at Prime Bank, which included the Legal Department, the Loan Operations Department, the Loan Review Department and the Compliance Department. In addition, served as a director of both the bank and the bank's holding company, Prime Bancshares, Inc.

Bracewell, LLP (formerly know as Bracewell & Patterson, L.L.P.) (1990 – 1994). Associate. Bracewell is a full service, multi-national law firm based in Houston. Worked in the Financial Services section of the firm representing both borrowers and lenders in structuring a variety of financial transactions and credit facilities.

PHILANTHROPIC ACTIVITIES AND PROFESSIONAL ASSOCIATIONS

American Leadership Forum – Senior Fellow. American Leadership Forum is a national network of chapters, each dedicated to building stronger communities by joining and strengthening leaders to better serve the public good. It enhances leadership by building on the strengths of diversity and by promoting collaborative problem solving within and among communities. ALF chapters carefully screen and select Fellows from leaders in the community.

The Houston Lighthouse for the Blind and The Lighthouse Foundation. Board of Trustees and Ex-Officio Chairman of the Board for the operating Lighthouse and the Lighthouse Foundation. Established in 1939, The Lighthouse of Houston is a private, nonprofit education and service center dedicated to assisting blind and visually impaired people in our community.

The Forest Club. President Ex-Officio.
The Forest Club is a private social club founded in 1946.

Semester at Sea. Board of Trustees and Past-President of the Alumni Association Board of Directors. In addition, currently serve Semester at Sea as the Houston area alumni representative. Served several terms on Alumni Advisory boards from 1996 to present.

YMCA of the Greater Houston Area.
Served on the Finance Committee of the Board of Directors from 2005 – 2007.

Texas Bar Association

EDUCATION

Southern Methodist University –
Southwestern Graduate School of Banking. Certificated 1999.
- Awarded Special Distinction for Leadership.

Baylor University School of Law. Juris Doctor 1990.
- 1989 Tracy Crawford Scholarship awarded for academic achievement.
- Dean's Honor List, spring 1988.
- 1988 Morris Harrell Scholarship awarded for academic achievement.

The University of Texas at Austin. Bachelor of Business Administration – Finance 1986.
- Dean's List, fall 1985.
- Dean's List, spring 1985.

GENERATION 26 BOARD MEMBER BIOGRAPHICAL AFFIDAVIT

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed.

BACKGROUND

Full Legal Name: Stuart Donovan Saunders

Home Mailing Address: 8 Saddlebrook Lane, Houston, TX 77024

Phone Number: 713-914-9778

E-mail Address: sdsaunders@missionheights.net

Business Name: Mission-Heights Enterprises, Ltd.

Business Mailing Address: 602 Sawyer Street, Suite 720, Houston, TX 77007

Business Phone Number: 713-914-9778

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?

My grandmother was a teacher and school administrator, my mother was a teacher, my sister was a teacher, I serve on the board of a higher education study-abroad non-profit organization. Education is in my family DNA. Nothing can change the trajectory of a life or a family like a good education.

While there a lots of good public schools in the greater Houston area, sadly there are also too many under-performing schools. I find it to be sad and unacceptable for anyone to be stuck in a poorly performing school and have no options. I am committed to creating a high-quality choice for those families.

2. What is your understanding of the appropriate role of a public charter school board member?

Our entire board of directors has (or will) attended a board training seminar conducted by a well-known charter school leadership trainer named Brian Carpenter. In the training session, Dr. Carpenter states clearly and emphatically that "The purpose of a charter school board is to ensure the school accomplishes the student outcomes which it was chartered to produce, within all of the required parameters." The board is to provide oversight of the school's Chief Executive, and not co-manage the school.

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.

Current Board/Leadership positions:

Board of Directors and Chairman - Heritage Ed.

Board of Directors - SouthTrust Bank

Board of Directors and Chairman - Live Oak Bancshares, Inc.

Board of Directors - First State Bank of Odem

Board of Directors - Odem Bancshares, Inc.

Board of Trustees - Semester at Sea/Institute for Shipboard Education. SAS/ISE is a non-profit corporation that owns and operates Semester at Sea, a college-level study abroad program.

Senior Fellow - American Leadership Forum

Scoutmaster - Troop 852, Sam Houston Area Council

Past Board/Leadership positions:

Board of Directors - Prime Bank

Board of Directors - Prime Bancshares, Inc. (a publicly traded company)

Board of Directors and President - The Forest Club

Board of Trustees and Chairman - The Lighthouse of Houston, a Texas non-profit serving blind and visually impaired citizens in the greater Houston area.

President - Semester at Sea Alumni Association

4. Describe the specific knowledge and experience that you would bring to the board.

I have a finance degree from the University of Texas at Austin School of Business. I have a law degree from Baylor University School of Law. My career experience ranges from private law

practice, bank general counsel, private investment management, and various boards of director positions including Chairman of multiple organizations. Legal practice focused primarily on banking and commercial financing transactions. As Senior Vice President and General Counsel of Prime Bank, I led a division of over 60 employees and managed legal and transactional activity such as mergers, acquisitions, asset sales and the company's initial public offering. In addition to the legal and banking experience, I serve as Managing Partner for Mission-Heights Enterprises, Ltd. where we manage a $25+ million real estate portfolio. I believe my experiences with finance, law and real estate will be extremely valuable to the many and varied responsibilities of starting a high-quality charter school.

SCHOOL MISSION AND PROGRAM

1. What is your understanding of the school's mission and guiding beliefs?

Our mission statement: Heritage Classical Academy provides a focused classical education to a diverse community of K-8 scholars by developing their knowledge to a state of wisdom (sapientia) and character to a state of virtue (virtus) and by preparing them to become well-educated self-governing citizens and leaders for the next generation of America.

I take that to mean that our school will work very hard to provide children with the rich and timeless wisdom it takes to be fully human. They will be ready for college, or if not college, for a career. But more than that, they will be ready to pursue happiness as an independent human and contribute to our society.

2. What is your understanding of the school's proposed educational program?

The school will offer a classical education. From a detailed perspective, the curriculum will have a heavy emphasis on phonics and the mastery of reading and the language arts. Obviously, science and mathematics will be taught as well, along with leadership and civic virtue.

We intend to teach the classics not because they are old, but because they have stood the test of time and continue to ring true in the souls of mankind regardless of gender, race, native tongue, or culture; because the classics provide the most thoughtful reflections on what it means to be fully human.

3. What do you believe to be the characteristics of a successful school?

A successful school is one that accomplishes the student outcomes which the school was charted to produce, within all of the required parameters. In other words producing student outcomes that exceed area norms as well as developing independent, self-governing citizens.

4. How will you know that the school is succeeding (or not) in its mission?

The four major aspects of school success that the board can oversee are: Financial, Educational Achievement, Compliance, and Environment.

Financial: Work to safeguard the school's resources from fraud, waste and abuse.

Educational Achievement: Oversight of the schools (1) absolute performance, (2) relative performance, (3) mission-specific outcomes, and (4) student gains for all students.

Compliance: Work to ensure statutory, regulatory and contractual compliance.

Environment: Work to ensure a safe, healthy, and positive environment for students and employees.

If we as a board can ensure these four elements, then our school will be successful.

GOVERNANCE

1. Describe the role that the board will play in the school's operation.

"The purpose of a charter school board is to ensure the school accomplishes the student outcomes which it was chartered to produce, within all of the required parameters." The board is oversight and governance, not management or operations. The board hires the CEO/ Superintendent, evaluates him or her, and sets policy.

2. How will you know if the school is successful at the end of the first year of operation?

Financial: operating within budget.
Educational Achievement: meeting student learning and advancement goals
Compliance: operating within all statutory, regulatory, contractual and policy guidelines
Environment: students and employees are functioning in a safe, healthy and positive environment.

3. How will you know at the end of four years if the school is successful?

Same factors as mentioned in Question 2 above, plus the school will be receiving a State accountability rating of "A."

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Perhaps the most important thing the board can do to ensure success is to hire the right CEO/ Superintendent, empower that person to do his/her job, and provide sufficient resources and support.

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?

It would be important to gather facts and review them in light of the school's Code of Ethics and Conflicts of Interest Policy. Outside legal counsel should be consulted, and depending on the gravity of the situation, actions could range from a discussion of the behavior with a reminder of our ethical standards all the way up to immediate suspension and removal from the board. If the actions were criminal, law enforcement might need to be notified.

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.

Prior to embarking on this project, I only knew Chelsea Collins. Ms. Collins was the middle-school principal for our children.

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.

Chelsea Collins was middle school principal and is now head of school at Saint Luke's Episcopal School.

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, owners, directors, or agents of that provider.

◉ Not applicable because the school does not intend to contract with an education service provider or school management organization.

○ Yes

○ No, I/we do not know any such persons

If yes, describe the precise nature of your relationship.

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.

Mission-Heights Enterprises, Ltd.
Mission-Heights Capital, Ltd.
M&S Partners

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 management 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, STUART SAUNDERS 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 Stuart Saunders

Date 1-12-21

BRENDA HARVELL
Notary Public, State of Texas
Comm. Expires 08-03-2023
Notary ID 7615100

Brenda Harvell
Notary in and for
the State of Texas

HERITAGE
CLASSICAL ACADEMY

ADVISORY BOARD 2021

Heritage Classical Academy has developed an Advisory Board to support the HCA board members, leadership, and staff in areas of community engagement, education of diverse learners, parent engagement and parent resources, curriculum audit for racial equity, and youth mentoring.

Matt Barnes, Co-founder of The Education Game. Matt has previously served as a Program Officer at Houston Endowment Inc. and Executive Director of Families Empowered. He is passionate about classical education, as all three of his children were educated in a classical school. Matt is a consultant and speaker regarding parent engagement in their child's education. He has served on nine education boards from a selective public university to a federal Head Start system.

Colleen Dippel, Founder and Executive Director, Families Empowered – an organization that has served over 90,000 families. Colleen Dippel began her career as a public school teacher through Teach for America. She left teaching to help launch a private-sector education technology start-up. She has served as the Director of the KIPP School Leadership Program, the Director of Alumni Support for Teach for America-Houston, and as Director of Education Initiatives at Aquinas Co. Colleen was awarded Leadership for Educational Equity's Emerging Political Leader Fellowship and an Aspen Institute Pahara Fellowship. She holds a BA from The University of New York at Albany and a MA in Educational Leadership from National Louis University

Paul Dirden, Associate Minister and Youth Director for the past 20 years, Mt. Canaan M.B.C. Paul works directly with youth sponsors within the church's youth department to provide resources for youth and direction to support them making wise choices. Paul also served honorably and faithfully in The United States Navy for 6 years and The United States Army National Guard for 7 years.

Yvette Leno, Director, Beauty Community Garden in Independence Heights, Houston, 2012 to present. Established on the site of her family home that burned to the ground in 1991, Yvette established the Community Garden to close the gap of food inequities and aspire to achieve a community of health and well-being. Yvette is also a Tax Technician forth CA State Franchise Board sine 1986. She is Board Secretary for the nonprofit Power Living Mission, Inc., an organization committed to upgrading the standard of living for men, women, and children of all ethnicities.

Angela Parham, Ph.D., Distinguished Professor of Social Sciences at Loyola University in New Orleans. Dr. Parham has held the following positions at Loyola: Director of the Social Justice Scholars Program; Assistant and Associate Professor; Chair of the African and African American Studies Program. Angel holds a B.A. in Sociology from Yale and an M.S.and Ph.D. from the University of Wisconsin at Madison. He has published an award-winning book, *American Routes: Racial Palimpsests and the Transformation of Race*, numerous journal articles, and has presented and numerous conferences.

Attachment 13: Organizational Charts for Year 1, Year 3, and Full Capacity

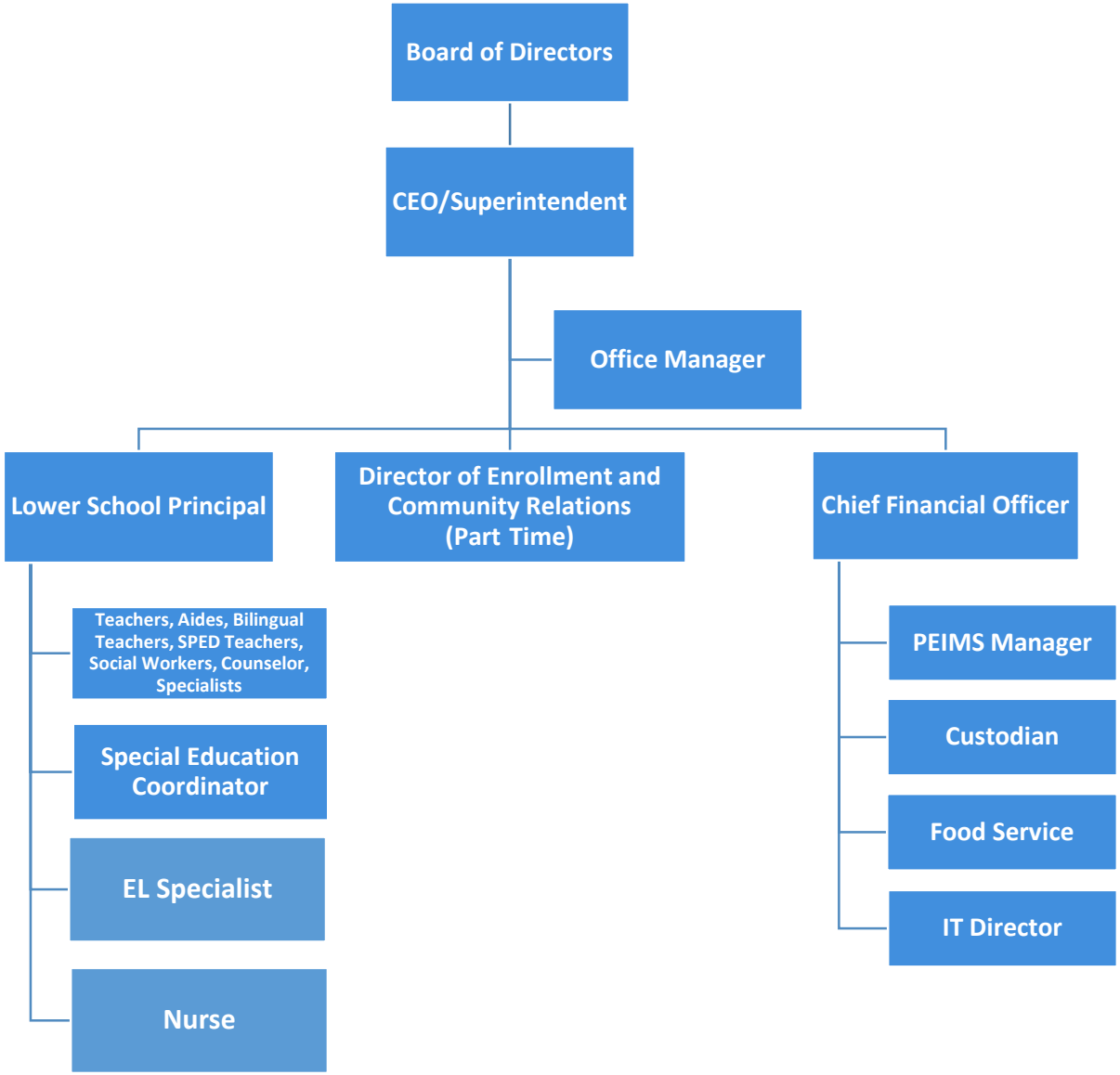
(Attachment 13 has been updated from Attachment 13 on pages 300-302 in the HCA GEN 25 charter application.)

Submit three organizational charts that show the school's governance, management, and staffing structures: (1) the first organizational chart will represent the school's structure during Year 1; (2) the second chart will represent the school's structure during Year 3; and (3) the third 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, Year 3, and at full capacity.

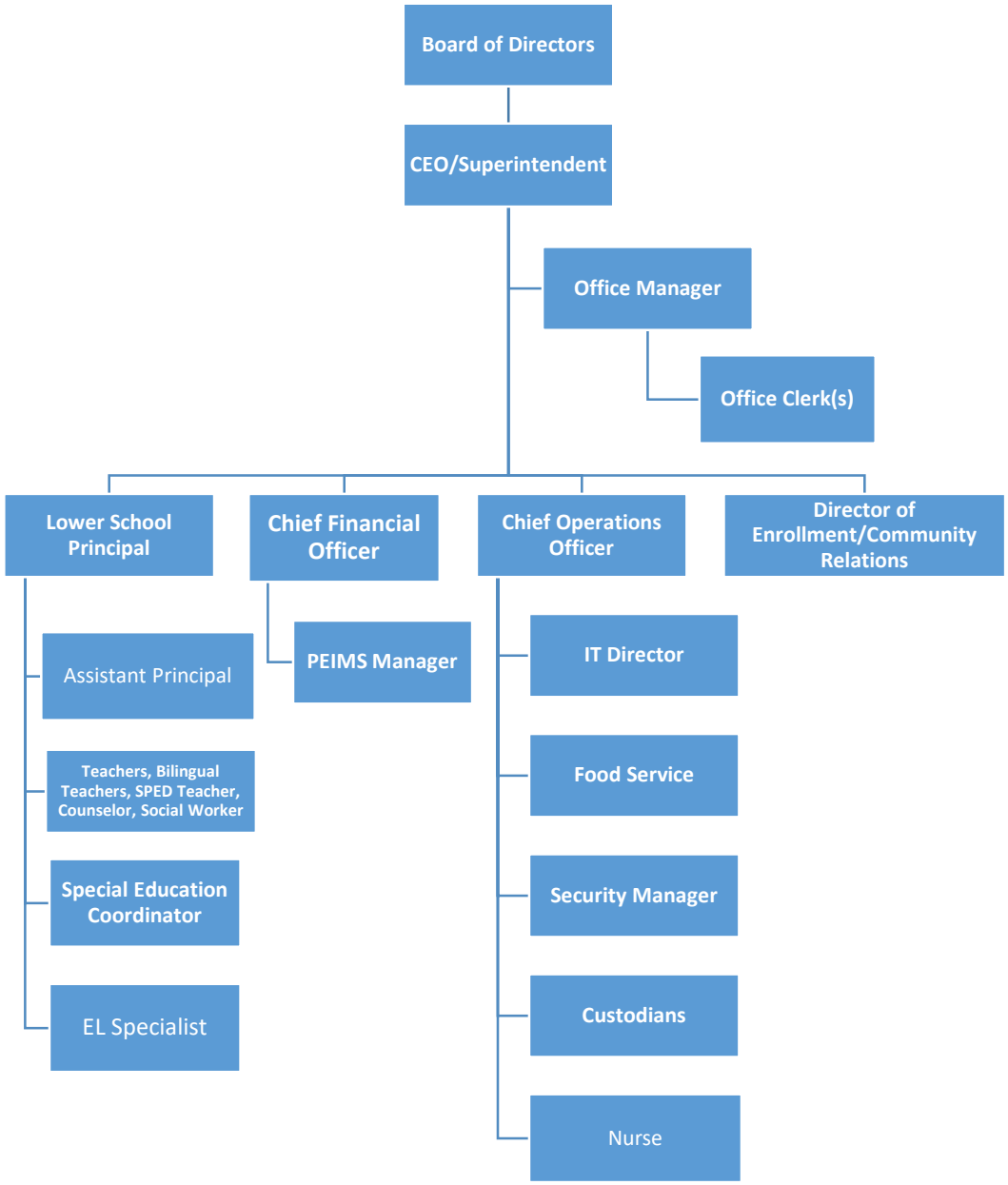
Each organizational chart must clearly delineate the roles and responsibilities of—and lines of authority and reporting among—the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the school. 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.

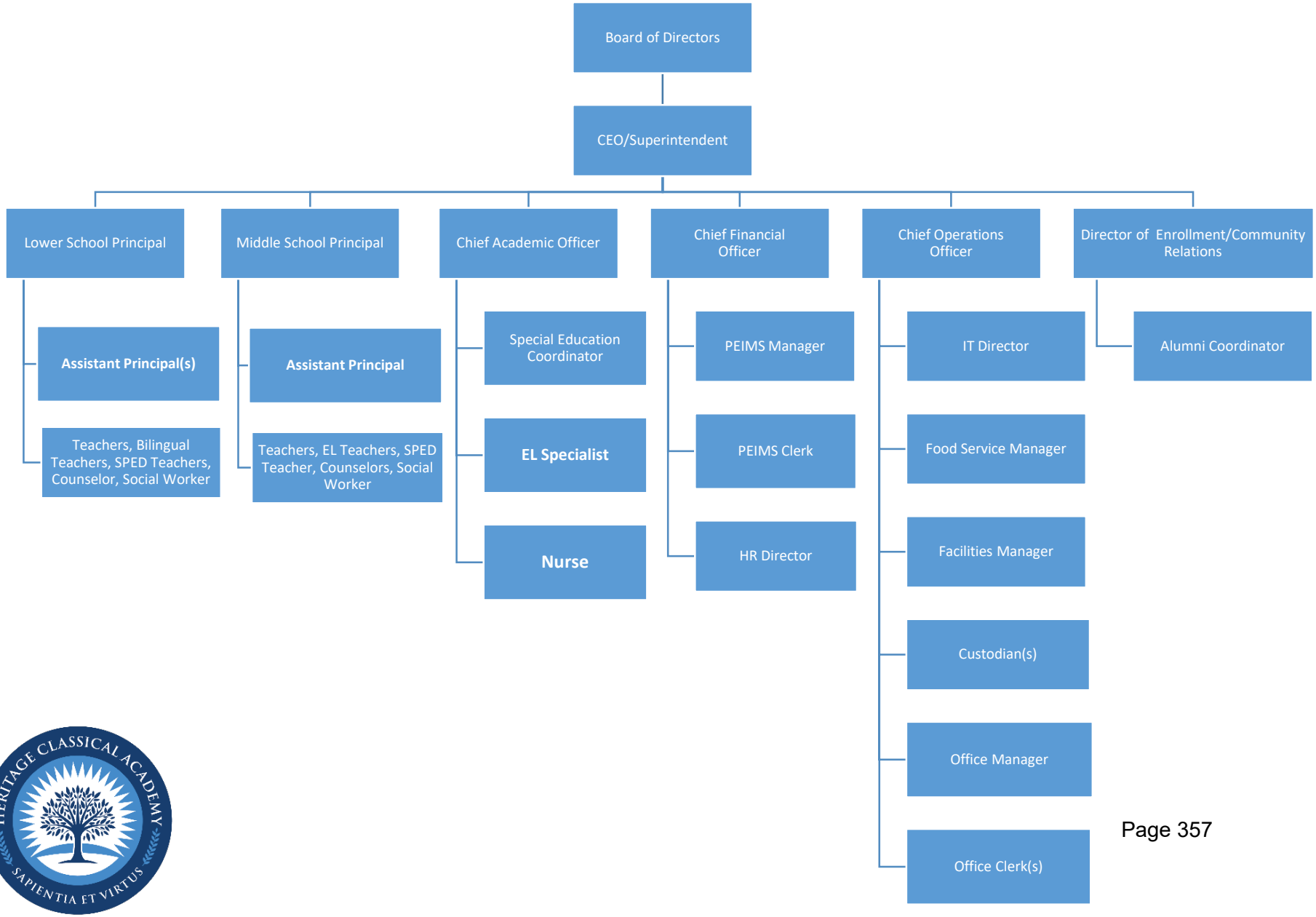
Heritage Classical Academy Organizational Chart – Year One



Heritage Classical Academy Organizational Chart – Year 3



Heritage Classical Academy Organizational Chart – Full Scale



Attachment 14: Superintendent Evaluation Tool(s)

(Attachment 14 has been updated from Attachment 14 on pages 304-308 in the HCA GEN 25 charter application.)

Provide any superintendent evaluation tool(s) that have been locally developed. If using a TEA-recommended tool such as the Texas Association of School Boards' Superintendent Evaluation system, please state so and link in the narrative response. DO NOT attach.

Heritage Classical Academy (HCA)

CEO/Superintendent Evaluation Form

(adapted from the BCSI Model Principal Evaluation Form and some indicators, with permission, from the Evaluation Form from the Founders Classical Academy in Lewisville, TX)

The purpose of the evaluation is to capture how the CEO/Superintendent is leading HCA to high performance levels in accordance with goals and objectives contained (a) in the charter application and contract and (b) in the Barney Charter School Initiative Agreement and (c) in the annual goals and performance objectives set by the Board of Directors. The evaluation will be completed by all board members annually and will include a three -step process: 1) initial goal setting at the beginning of the year; 2) mid-term assessment in January; and 3) final evaluation at the end of June. The process will be very thorough and will include short survey data from parents, staff, and partners (the survey will be on a 5-point scale, with 5 being the highest score possible); documentation as needed; observations where possible; and student, financial, and operations outcome data. The CEO/Superintendent will complete a self-evaluation at each stage of the process. Many of the metrics used are quantitative, but HCA plans to use qualitative data so support any quantitative metrics. The CEO/Superintendent will receive a rating on each indicator and then a summary rating that will be on a scale between 1 and 4, from ineffective to highly effective, with 4 being the highest. The evaluation form will include commendations for outstanding performance as well as recommendations for improvement.

Performance Indicators	Highly Effective (4)	Effective (3)	Partially Effective (2)	Ineffective (1)
1.Professionalism				
1.a. Displays a positive role model for students	**Always (100%)** serves as a positive role model	**Regularly (> 95%)** serves as a positive role model	**Often (90%)** serves as a positive role model	Rarely serves as a positive role model
1.b. Accepts, evaluates, and acts upon feedback, advice and criticism	**Always (100%)** actively seeks out feedback, criticism, suggestions, and always applies information	**Regularly (>95%)** seeks out feedback, criticism, suggestions, and always applies information	**Often (>90%)** listens to directed feedback w/o being defensive and accepts and applies suggestions	**Rarely** accepts feedback w/o acting defensive and rarely applies criticism or suggestions
1.c. Exhibits a professional manner in both actions and dress.	Always **(100%)** present-able as a consummate professional	Invariably **(>95%)** acts or dresses in a professional manner	Regularly **(>90%)** acts or dresses in a professional manner	Occasionally acts or dresses in an unprofessional manner
1.d. Displays sound judgment and respect in all aspects of the position.	Invariably ethical honest, aboveboard, uses impeccable judgment, and remains respectful **(100%)**	Invariably ethical, honest, aboveboard, uses impeccable judgment, and remains respectful **(100%)**	Ethical, honest, uses good judgment, and acts respectful to parents & co-workers (>90%)	Often uses questionable j udgment, and is disrespectful to parents & co-workers

1.e. Seeks out professional growth opportunities	Evidence of **4** PD/growth opportunities	Evidence of **3** PD/Growth opportunities	Evidence of **2** PD/Growth opportunities	**No** evidence of PD/Growth opportunities
2. Mission, Vision, Virtues, and Goals				
2.a. Communicates and implements the mission, virtues, and vision of HCA	**95%** of students, staff and parents can articulate HCA mission, motto, and virtues	**>90%** of students, staff and parents can articulate HCA mission, motto, and virtues	**>85%** of students, staff and parents can articulate HCA mission, motto and virtues	**< 70%** of students, staff and parents can articulate HCA mission and motto
2.b. Establishes annual goals and metrics aligned with the mission and vision	**Excellent** planning document presented to Board	**Good** planning document present to Board	**Partially complete** planning document presented to Board	**Inadequate** planning document presented to Board
2.c. Develops a culture demanding moral virtue, decorum, respect, discipline, and studiousness among students and all staff	**4.5** rating on school culture in annual survey of constituents	**>4.0** rating on school culture in annual survey of constituents	**>3.5** rating on school culture in annual survey of constituents	**<3.0** rating on school culture in annual survey of school constituents
3. Instructional Leadership				
3.a. Leads annual curriculum guide development across the four core disciplines.	**4.5** score from faculty on leading in this area	**>4.0** score from faculty on leading in this area	**>3.5** score from faculty on leading in this area	**<3.0** score from faculty on leading in this area
3.b. Conducts effective faculty observations; coaches and mentors	**4.5** score from faculty on 3.b; also # of faculty observations (metric TBD)	**>4.0** score from faculty on 3.b; also # of faculty observations (metric TBD)	**>3.5** score from faculty on 3.b; also number of faculty observations (metric TBD)	**<3.0** score from faculty on 3.b.; also number of faculty observations (metric TBD)
3.c. Oversees the effective administration of state tests.	**0** testing irregularities	**1** testing irregularity	**2** testing irregularities	More than **2** testing irregularities
3.d. Develops a technology plan to support but not detract from the curriculum	**4.5** score from faculty on 3.d.;	**>4.0** score from faculty on 3.d.;	**>3.5** score from faculty on 3.d.	**<3.0** score from faculty on 3.d.
4. Functional Leadership				
4.a. Recruits, rewards and retains outstanding faculty and staff	**100%** of staff hired meet hiring goals; **90%** retention rate	**>90%** of staff hired meet hiring goals; **>85%** retention rate	**>85%** of staff hired meet hiring goals; **>80%** retention rate	**<75%** of staff hired meet hiring goals; **<75%** retention rate
4.b. Provides necessary training and development for faculty and staff	**4.5** score from faculty and staff on 4.b.; **100%** implementation of PD plan	**>4.0** score from faculty and staff on 4.b.; **>95%** implementation of PD plan	**>3.5** score from faculty and staff on 4.b.; **>90%** implementation of of PD plan	**<3.0** score from faculty and staff on 4.b.; **<70%** implementation of PD plan

4.c. Exhibits strong leadership inside and outside the school	**4.5** score from all school constituents on 4.c.	**>4.0** score from all school constituents on 4.c.	**>3.5** score from all school constituents on 4.c.	**<3.0** score from all school constituents on 4.c.
4.d. Works collaboratively and builds teams to accomplish goals	**4.5** score from all school constituents on 4.d.	**>4.0** score from all school constituents on 4.d.	**>3.5** score from all school constituents on 4.d.	**<3.0** score from all school constituents on 4.d.
4.e. Demonstrates initiative	Documentation of at least **4** successful new initiatives	Documentation of at least **2** new successful new initiatives	Documentation of at least **1** new successful new initiative	**No** evidence of any new initiatives
4.f. Handles any crisis or problem in a calm, effective manner	**4.5** score from all school constituents on 4.f.	**> 4.0** score from all school constituents on 4.f.	**> 3.5** score from all school constituents on 4.f.	**<3.0** score from all school constituents on 4.f.
4.g. Motivates staff, students and parents.	**4.5** score from all school constituents on 4.g.	**>4.0** score from all school constituents on 4.g.	**>3.5** score from all school constituents on 4.g.	**>3.0** score from all school constituents on 4.g.
5. Financial Management				
5.a. Works with the Finance Committee and CFO to develop an annual budget	Budget is on time and **100%** accurate	Budget is on time and **>95%** accurate	Budget is not on time and **>90%** accurate	Budget is not on time and **<70%** accurate
5.b. Monitors the annual budget and reports variances regularly to the board	Always **(100%)** analyzes and reports variances	Regularly **(>90%)** analyzes and reports variances	Often **(>80%)** analyzes and reports variances	Rarely **(<70%)** analyzes and reports variances
5.c. Develops plans to mitigate any variances and submits to the Board	**Excellent** plans to mitigate variances submitted	**Very good** plans to mitigate variances submitted	**Good** plans to mitigate variances submitted	**Poor or no** plans submitted
5.d. Monitors with the CFO the timely and accurate submission of PEIMS data	PEIMS data submitted accurately **100%** of time	PEIMS data submitted needs **minor** correction with no penalties	PEIMS data submitted needs **major** corrections, but no penalties	**Inaccurate** submission of PEIMS data with consequences for school
5.e. Works closely with the Director of Enrollment/Community Outreach to ensure student enrollment targets are met	**100%** of enrollment target met	**>95%** of enrollment target met	**>90%** of enrollment target met	**<80%** of enrollment target met
5.d. Supports the Board Development Committee in raising funds to ensure fundraising targets are met	**100%** of fundraising goal met	**>95%** of fundraising goal met	**>90%** of fundraising goal met	**<80%** of fundraising goal met
6. Operations Management				

6.a. Develops systems for effective time and resource allocation	**100%** rating on metrics developed by HCA for effective time and resource allocation	**>95%** rating on metrics developed by HCA for effective time and resource allocation	**>90%** rating on metrics develope d by HCA for effective time and resource allocation	**<70%** rating on metrics developed by HCA for effective time and resource allocation
6.b. Ensures school safety and security	**Zero** safety and security violations	**1** safety and security violations	**2** safety and security violations	**>5** safety and security violations
6.c. Ensures cleanliness and proper use and maintenance of facilities; proposed any capital improvements	**4.5** rating by school constituents on facilities use and cleanliness	**>4.0** rating by school constituents on facilities use and cleanliness	**>3.5** rating by school constituents on facilities use and cleanliness	**<3.0** rating by school constituents on facilities use and cleanliness
6.d. Ensures quality auxiliary services: food service, transportation, after school, etc.	**4.5** rating by school constituents on auxiliary services	**>4.0** rating by school constituents on auxiliary services	**>3.5** rating by school constituents on auxiliary services	**<3.0** rating by school constituents on auxiliary services
6.e. Compliant with all state and federal mandated requirements	**100%** compliant	**>95%** compliant	**>90 %** compliant	**<80%** compliant
6.d. Clean audit.	**No** material weaknesses in audit	**One** material weakness on audit	**Two** material weaknesses in audit	**More than three** material weaknesses in audit
7. Communication and Community Relations				
7.a. Effective oral and written communication to internal and external audiences	**Always (100%)** speaks and writes correctly and eloquently without regard for the context or setting	**Regularly (>90%)** uses correct grammar, syntax, usage, and spelling in professional contexts	**Often (>80%)** uses correct grammar, syntax, usage, and spelling in professional contexts	**Frequently** makes errors in grammar, syntax, usage, or spelling in professional contexts
7.b. Uses available media to communicate about the school	Meets **100%** of media tracking goals	Meets **>90%** of media tracking goals	Meets **> 80%** of media tracking goals	Meets **<70%** of media tracking goals
7.c. Engages with families and the community through Parent Nights, and by attending in school and after-school events.	Attended **95 %** of Parent Nights, and in school and after-school events	Attended **>90%** of Parent Nights, and in school and after-school events	Attended **>80%** of Parent Nights, and in school and after-school events	Attended **<80%** of Parent Nights, and in school and after-school events
7.d. Attends community meetings and gives presentations about the school.	**>7** speaking engagements about the school	**>5** speaking engagements about the school	**> 3** speaking engagements about the school	**No** speaking engagements about the school
7.e. Is a good listener	**4.5** or higher on constituent	**>4.0** on constituent survey on this skill	**>3.5** on constituent	**<3.0** on constituent survey on this skill

	survey on this skill		survey on this skill	
8. Evidence of Meeting Goals:				
1.a. Student Outcome goals are met for all target subgroups (Note: in the final form, these student outcome metrics will be detailed to match the performance indicators)	**Exceeds** outcome targets for all student groups	**Meets** outcome targets for all student groups	**Just below** outcome targets for all student groups	**Below** outcome targets by10% and/or large gaps in subgroups.
1.b. Results of parent staff, and partners feedback are positive	**4.5** or higher on 5 pt. scale	**4.0** or higher on 5 pt. scale	**3.5** or higher on 5 pt. scale	**<3.0** on 5 pt. scale
1.c. Financial goals are met	**100%** of budget goals are met	**>95**% of budget goals are met	**>90%** of budget goals are met	**<70%** of budget goals are met
1.d. Operations goals are met	**100%** of operations goals are met	**>95%** of operations goals are met	**>90%** of operations goals are met	**<70%** of operations goals are met

Note: In setting up the section on outcome measures, HCA will draw from TEA's Lone Star Governances approach. See https://tea.texas.gov/search?s=lone+start+governance.

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.

N/A

Attachment 16: Job Description or Qualifications for Superintendent

(Attachment 16 is updated from Attachment 16 on pages 310-313 in the HCA GEN 25 charter application.)

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.

HERITAGE
CLASSICAL ACADEMY

CEO/Superintendent
Job Description
(note the Executive Search firm will revise)

The Heritage Classical Academy (HCA) is a nonprofit organization applying for a charter with the state of Texas to open a school, beginning with grades K-1, in 2021. The mission of Heritage Classical Academy is to provide a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom and character to a state of virtue and by preparing them as well-educated citizens and leaders for the next generation of America.

Summary: The CEO/Superintendent is responsible for the further development and implementation of Heritage Classical Academy's mission, goals, and strategic direction and all educational, operational, financial, managerial, and programmatic aspects of the organization. The CEO/Superintendent reports directly to the Board of Directors and works closely with the Board, the staff, and its external partners to implement the charter contract with fidelity. The CEO/Superintendent is responsible for hiring and managing all teachers and other school staff. The CEO/Superintendent is the academic leader whose overarching role is to set high expectations for all students and maintain the integrity of the school's culture and effective learning environment, accomplishing this by overseeing every aspect of the school's daily instructional and academic functions. The CEO/Superintendent has primary responsibility for reaching enrollment projections and advancing the organization's fundraising goals and meeting its funding targets. In addition, the CEO/Superintendent manages critically important relationships with the Texas Education Agency and government officials and is responsible for ensuring the school is compliant with all city, county, state, and national regulations. The CEO/Superintendent will set the example for all students, teachers, and staff to maintain a constant atmosphere of civility, trustworthiness, respect, and concern for one another. The CEO/Superintendent will be the liaison with the Hillsdale College Barney Charter School Initiative (BCSI).

Salary plus benefits: This will be a salaried, exempt position with a 12- month work schedule with three-weeks paid vacation in July and other holidays following the school schedule. Salary will be set annually on a performance-based schedule. Initial salary is negotiable depending on qualifications and experience. Full-time employment will commence upon receiving a charter contract from the Texas Education Agency in September 2021.

Responsibilities:

Leadership

- Implementing and evaluating the school's mission and goals, reporting regularly to the Board of Directors.
- Maintaining a school atmosphere of academic excellence, civility, trustworthiness, respect, fairness, and equality.

Instructional

- Planning, implementing, and evaluating the school instructional program based on student needs and the Texas Essential Knowledge and Skills (TEKS).
- Setting instructional priorities and goals.
- Ensuring alignment of curriculum and instruction with the TEKS and the BCSI guidelines and the charter contract.

- Ensuring that the needs of special education, gifted and talented, EL, ESL and bilingual students are met and that the school complies with all state regulations regarding these students.
- Ensuring that all academic components of the school's charter are achieved.
- Serving as the liaison with Hillsdale College Barney Charter School Initiative.

Administrative

- Recruiting instructional faculty and staff for the school as needed.
- Planning, implementing, supervising, and evaluating all other programs, i.e. athletics, extra- curricular, co-curricular, after school.
- Determining staffing needs and recruiting, selecting, supervising, developing and evaluating school instructional personnel, Chief Financial Officer (CFO) and Chief Operations Officer (COO), and other staff.
- Managing state assessment procedures and compliance.
- Reporting instructional employee appointment or dismissal to the Board of Directors.
- Overseeing and managing the finances of the school, ensuring the school is operating within budget and providing regular reports to the Board of Directors with the CFO.
- Overseeing the proper academic record keeping processes.
- Overseeing and managing the work of consultants and contractors to ensure proper execution of all agreements and timely delivery of services.
- Maintaining records such as but not limited to student test scores, attendance records, overseeing IEPs, and all other reports as needed for efficient operation of the school and compliance with federal, state, and local requirements.
- Enforcing the policies and procedures of the organization as set by the Board of Directors, including the student code of conduct.
- Developing and implementing school rules and regulations in keeping with the policies and procedures.
- Attending and participating in meetings of the Board and its committees.
- Maintaining knowledge of state charter school laws, city facility regulations, and any grant requirements from federal or philanthropic grants.
- Ensuring the enrollment projections are met and all lottery procedures meet state laws.

Development and Partnerships

- Developing and executing, in conjunction with the Board Development Committee, an annual fundraising plan to secure funds required for ongoing operations of Heritage Classical Academy.
- Developing collaborative partnerships with new and existing stakeholders to develop and implement the school's education plan.
- Developing new relationships with local, national, and regional foundations and community development agencies to ensure that the work of Heritage Classical Academy is well known and that appropriate support for Heritage Classical Academy is generated.
- Serves as liaison between Heritage Classical Academy and the larger community, representing Heritage Classical Academy at governmental forums, local community board meetings, and professional conferences and meetings.

Required skills, experience, and abilities:

- Master's degree
- Candidates must have a solid understanding of classical education and a dedication to the liberal arts.
- At least four years of progressively responsible positions in school leadership.
- Teaching experience at the K-12 or college level.
- Strong interpersonal and communication skills, including clear writing and compelling presentation skills.
- Ability to attract families to enroll their students in the school.
- Strong financial and business background: ability to read, understand, and manage financial statements and budgets.
- Ability to build a capable team within the school and with other partners and constituents of diverse backgrounds in the public, private, and nonprofit sectors.

- Ability to manage multiple priorities and tasks simultaneously.
- Ability to use MS Office including MS Word, Excel, and PowerPoint.
- Texas certification as either school principal or educational leadership required within the first year of employment.

Desirable skills, experience and abilities:

- Ph.D. or Ed.D.
- Experience leading or being a part of a start-up school or other organization.
- Ability to develop and execute three- to five-year strategic plans.
- Successful record and proven ability to raise funds from public, private, and individual constituents.
- Good relationships with Texas philanthropic organizations and the Texas Education Agency.
- Knowledge of accounting software and order processing software.

Desirable personal qualities:

- Self-motivated and proactive
- Energetic, enthusiastic and optimistic
- Flexible and adaptable
- Solution-oriented and creative
- Excellent work ethic
- Political savvy
- Strong attention to detail
- Passionate about improving opportunities for children and families living in poverty.

Interested, qualified applicants may submit the following documents:

- Cover letter stating why you are interested in the job position and why your skills, knowledge, and experience are a good match for the job.
- Resume
- At least two written letters of recommendation
- At least three references with contact information including email addresses.

For further information and to submit your application email Stuart Saunders at:

Stuart Saunders
Heritage Classical Academy
603 Sawyer Street
Houston, TX

A Board Search Committee will work with an Executive Search Firm to review applications, interview qualified candidates, and then present the finalists to the full Board. Applicants may be required to submit additional information such as work product samples during this process.

The Board seeks to select a CEO/Superintendent by April 15, 2021.
The CEO/Superintendent selected will need to be available for an interview with staff from the Texas Education Agency and the State Board of Education the week of May 10, 2021.
Full-time employment will commence in September 2021 if and when the school receives its charter contract from the Texas Education Agency.

The organization is an equal opportunity employer. The organization is committed to providing equal opportunity for all individuals in all areas of recruitment, selection, placement, training, assignment, transfer, compensation, benefits, discipline, retention, and promotion. The board commits itself to the policy that there shall be no unlawful discrimination against any person because of race, color, religion, age, sex, gender identification, national origin. or disability. All decisions regarding employment shall comply with applicable state and federal laws.

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

(Attachment 18 is updated from Attachment 18 on pages 316-321 in the HCA GEN 25 charter application.)

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 (Attachment 23) are required for each position on the staffing chart. 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.

Job Descriptions for Proposed Instructional Leadership Team

Chief Academic Officer (CAO)

The CAO, in cooperation with the CEO/Superintendent, will develop, coordinate, articulate and evaluate the curriculum, instruction, professional development or instructional staff and assessments for HCA.

Responsibilities

The CAO, with the support of the CEO/Superintendent, will manage curriculum articulation and programming with the BCSI guidelines and the TEKS. Working closely with the teachers and other school staff; the CAO will coordinate processes of curriculum review, development and implementation; coordinate ongoing review and revision of grade level standards and expected learning results; coordinate and monitor selection, ordering and adoption of instructional materials; disseminate research that addresses best practices to support improvement; and facilitate the development and alignment of curriculum for categorically funded programs.

Qualifications

- Master's degree
- 3-5 years of teaching experience
- 2 or more years as a CAO or Director of Curriculum and Instruction
- Teacher certification
- Broad knowledge of curriculum development, instructional best practices, supervision and evaluation
- Alignment with the classical education model
- Commitment to vision, mission, and principles of HCA
- Collaborative yet decisive in decision-making
- Effective interpersonal, communication and conflict resolution skills

Principal(s)

The Lower School and Middle School Principals will be responsible for providing instructional leadership to teachers and support staff to ensure the ultimate academic success of the school.

Responsibilities

Recruit, interview and recommend to the CEO/Superintendent the selection of teachers, counselors and other staff to support the educational program. Oversee and support teachers; observe employee performance, record observations and conduct teacher evaluations, inform the CEO/Superintendent's evaluation of teachers; commit to the mission and vision of the school; be highly organized and self-sufficient; set and monitor the teaching schedule for the core faculty; develop and manage, alongside the CEO/Superintendent and CAO, systems and structures that maximize student learning for each subgroup; evaluate academic achievement through detailed data analysis; monitor grading policy; coordinate administration of state and national-norm referenced tests; differentiate training and action plans for teachers; ensure compliance with all state and federal laws and HCA school policies.

Qualifications

- Master's degree
- Two or more years of teaching experience, preferably in an urban setting
- Two or more years as an assistant principal or principal
- Teaching credential
- Completed an approved principal preparation program
- Experience in education, strategic planning and staff development
- Alignment with the classical education model
- Commitment to vision, mission, and principles of HCA
- Knowledge regarding TEKS
- Marked success with quantifiable and objective student performance gains with all subgroups that surpass state and local district averages is highly preferred.

Assistant Principal

The Assistant Principal will provide assistance to the Principal(s) with the overall administration of the instructional program and school.

Responsibilities

Participate in the development and evaluation of the educational programs; encourage and support the development of innovative instructional programs; assess curriculum by monitoring course overviews and lesson plans; help manage academic support programs; assist Principal(s) in interviewing, selecting and orienting new staff; ensure the continuous professional development of all staff by collaborating with other Leadership Team members to design, develop and execute individual and staff-wide professional development. Manage student involvement in the auxiliary programs and field lessons. Manage student discipline. Support communication between home and school and organizing Back-to-School night, parent conferences and progress reports.

Qualifications

- Bachelor's degree, Master's degree preferred
- Three year or more of teaching experience; teaching cerificate
- At least two years of school leadership experience; principal certification preferred.
- Ability to establish rapport with families and children
- Ability to exercise excellent judgement in decision-making
- Ability to work both on broad-based strategy and everyday details
- Management skills to coordinate some events and communication between home and school.
- Motivation to grow as an educational professional
- Commitment to vision, mission, and principles of HCA

Special Education Coordinator

The Special Education Coordinator will ensure that HCA will be able to provide its students with disabilities the supports they need to achieve their full potential.

Responsibilities

The Special Education Coordinator will oversee maintenance records for special needs students; provide oversight of the IEP process; arrange additionally required accommodations and modifications within the classroom as required by the IEP, as well as referrals along a continuum of special education services; develop strong relationships with parents of special needs children; ensure special education due process; create an annual schedule for IEPs; provide training and lead teachers in professional development regarding special education services; conduct intake assessments and oversee the evaluation/reevaluation process; maintain compliance with all federal and district SPED regulations; interview special education teachers; and address any issues that may arise in general education classroom settings.

Qualifications

- Bachelor's degree required; Master's degree preferred
- Texas special education and teaching certification
- 2-5 years of experience working with students with special needs
- Commitment to vision, mission, and principles of HCA and the classical education model
- Knowledge of the IEP process and experience working with teachers to implement the accommodations and modifications detailed in the IEP
- Marked and quantifiable success working with students with special needs preferred

EL Specialist

The EL Specialist will ensure that HCA will be able to provide its EL students with the supports they need to achieve their full potential.

Responsibilities

Confer with staff regarding instructional techniques, organization of practices, etc., to provide guidance and mentoring for HCA parents, students and staff regarding EL students; address operational issues related to EL students; plan, prepare and deliver lesson plans and instructional material for EL students to facilitate their acquisition of English language skills; identify and advocate for program needs; observe and evaluate EL students' performance and progress using data to adjust teaching strategies; communicate student progress to parents of EL students; plan and participate in EL meetings, workshops, trainings, and seminars; research new materials and recommend pilot projects for the purpose of providing the most effective program for students.

Qualifications

- Bachelor's degree required; Master's degree preferred
- Certification in ESL or bilingual teacher certification
- 2-5 years as an ESL or bilingual teacher
- Commitment to vision, mission, and principles of HCA and the classical education model
- Marked and quantifiable success working with EL students preferred
- Work under limited supervision using standardized practices and/or methods.

Master Teacher(s)

Master Teachers are classroom teachers who will have additional responsibilities. They will work with the school Principal, Assistant Principal, and CAO to organize and lead curriculum instruction and professional development at each grade level, and organize and convene vertical and horizontal teacher meetings to review data and student progress.

Responsibilities
Master teachers are classroom teachers who will have additional responsibilities. They will develop master lesson plans to serve as models for classroom teachers; organize vertical and horizontal teacher meetings to review data and student progress for all subgroups; support classroom teachers in identifying and implementing instructional strategies to enhance student learning; lead and supervise teachers in curriculum, classroom environment and parent relationships; provide activities and opportunities that encourage communication and understanding among fellow teachers; support the Assistant Principal and Principal in observing teachers in classroom or other teaching settings to assess relevant skills and recommend methods and strategies appropriate to overall school academic and culture goals.

Qualifications
- Bachelor's degree; Master's degree preferred
- Teacher certification required
- 3-5 years teaching experience; public or charter school experience preferred
- Commitment to vision, mission, and principles of HCA and the classical education model
- Documented success with student achievement for all subgroups
- Prior experience leading teachers preferred

Counselor
The School Counselor will report to the Principal and work with the CAO to develop a strong social emotional learning/character development curriculum to support students in developing excellent skills in self-management, interpersonal relations, and strong character and to counsel students and their families in small group or individual sessions.

Responsibilities
The School Counselor will develop, implement and evaluate a comprehensive counseling and guidance program; coordinate with the school and community organizations to bring resources to support students and families with any counseling needs; develop lesson plans for advisory periods related to social emotional learning; identify and support the implementation of a social emotional learning/character development curriculum; work with teachers and instructional leaders to strategize about working with students with challenging behavior problems; develop protocols for the staff to refer students in the lower grades for counseling sessions; develop protocols for staff to refer students and for students to self-refer in middle school; identify external speakers who can present at Parent Forum night about mental health.

Qualifications
- Master's degree
- Texas certification in counseling
- 2-5 years of experience working with counseling students in school settings
- Commitment to vision, mission, and principles of HCA
- Knowledge about social emotional learning/character development

- Knowledge about the process and experience working with teachers to implement advisory programs
- Coordination and management skills
- Marked and quantifiable success working with students in a school setting

Social Worker

The HCA Social Worker will help students grow socially and academically.

Responsibilities

Provide case management for students and families requiring multiple services and or resources such as mental health, health services, and basic needs with private and government agencies; develop and build community agency partnerships; make regular home visits as needed; provide training to school staff, parents and community partners, including PD on trauma informed community and ACEs scores; counsel students; resolve issues like bullying, school absences and other conflicts; help students cope with disabilities, behavior management and mental health issues; report any child abuse or neglect; manage case records; educate parents on available resources to help their child(ren); create individualized student plans; advocate for students, families and resources; work with local organizations to solve family issues related to food, housing, etc.; comply with all state, federal, and HCA policies.

Qualifications

- Bachelor's in Social Work required; MSW preferred
- Social worker license
- 2-4 years of experience with working with children and families
- Commitment to vision, mission, and principles of HCA and the classical education model
- Strong time management skills
- Calm and easy demeanor when working with children, staff and families
- Strong communication skills, both oral and written
- Ability to maintain accurate and appropriate case records and documentation
- Ability to maintain a statistical, demographic breakdown of caseloads
- Ability to evaluate, interpret, and perform research with specific application to student, family and community issues
- Ability to expand and exchange knowledge through consultation with coordinators, specialists, psychologists, counselors and other colleagues

Director of Enrollment and Community Outreach

The Director of Enrollment and Community Relations will identify and manage external partnerships, as well as the application and enrollment process.

Responsibilities

Identify and manage community partnerships to support the school programs; collaboratively develop and implement a comprehensive strategic plan to grow and deepen HCA's relationship with community partners; develop a plan to better involve and incorporate feedback from

community partnerships; develop, in partnership with the Board Ad Hoc Marketing/Recruiting Committee, a strategic annual student enrollment plan, including PR and marketing materials and the use of social media; implement the enrollment plan to meet annual target enrollments**;** manage the application, lottery (if necessary), enrollment and orientation processes; support the Board Development Committee in developing partnerships with potential funders and submitting grant applications.

Qualifications

- Bachelor's degree
- At least two years of experience in student recruitment
- Commitment to vision, mission, and principles of HCA and the classical education model
- Excellent written and oral communication skills; ability to influence and engage a wide-range of personalities and build long-term relationships
- Familiarity with the area served as well as neighboring counties
- Ability to work both independently without close oversight, and also as a team player who can productively engage with the Instructional Leadership Team and Board of HCA.
- Working knowledge of Microsoft Office, Word and Adobe and social media
- Driver's license, current vehicle insurance and satisfactory driving record.

Director of IT

The IT Director will be responsible for supervising all HCA IT operations.

Responsibilities

Establish technology standards and requirements; oversee and manage the design, implementation, delivery, monitoring and administration of IT services. Ensure consistency and stability of networks and educational software, including hosted licensed applications and on-site purchased applications; ensure all IT equipment is in excellent working condition; assist in school website updates; assist with strategic planning as it pertains to IT; supervise and support site IT operations; assist educational staff as needed to identify, implement and administer software programs; train staff in IT and digital tools.

Qualifications

- Bachelor's Degree
- At least two years of technology experience, preferably in a school setting
- Working knowledge of Mac and PC operating systems
- Working knowledge of Microsoft Office products and applications as applied to education
- Knowledge of internal network operations and Microsoft Windows server operating system
- Working knowledge of Google domain and all related applications as applied to education
- Knowledge of educational software and digital tools for students
- Comfort in an educational environment

- Supervisory experience preferred
- Classroom and instructional experience preferred .

(Note: IT Director is also part of the Operations Team.)

School Nurse

The School Nurse is responsible for supporting the development of a health and wellness program and safety protocols to ensure the health and safety or HCA students.

Responsibilities:

Provide relevant health education to students, staff, and parents, including up-to-date information about COVID; provide health care procedures and protocols to ensure the health and safety of the students and staff; partner with community providers to perform health screenings; monitor immunizations, manage infection control measures, and assess the school environment to prevent injuries and ensure safety; oversee medical administration and special procedures according to physicians' orders; notify parents of accidents or illness; tend to ill or injured students in school if appropriate; secure medical care for students in emergency situations.

Qualifications:

- Nursing degree
- Nursing certificate
- At least two years of experience working as a professional nurse in a medical or school setting.

Attachment 19: Leadership Evaluation Tool(s)

(Attachment 19 is updated from Attachment 19 on pages 322-326 in the HCA GEN 25 charter application.)

Provide any leadership evaluation tool(s) that have been locally developed. If using a TEA-recommended tool such as the Texas Principal Evaluation and Support System (T-PESS), please state so and link in the narrative response. DO NOT attach.

HCA Instructional Leadership Team Evaluation Form

(Adapted from the Highline Public Schools Cabinet Evaluation Form and several items on professionalism from the Founders Classical Academy in Lewisville, TX**)**

The purpose of the evaluation for members of the Instructional Leadership Team, the Chief Academic Officer, Division Principals, Special Education Coordinator, EL Specialist, Master Teachers, Counselors, Social Workers, and the Director of Enrollment and Community Outreach is to:1) determine the level of performance of each member of the team related to his or her job responsibilities and 2) determine the level of performance on several other key indicators that support the overall performance of students and the school**.** Because HCA will address the needs of the whole child, the counselor and social worker are part of the Instructional Leadership Team. Although they are not included in this evaluation form, the Chief Financial Officer and Chief Operations Officer are included as members of the instructional leadership team during the financial planning process, as it is the intent of HCA to have the budgeting and operations functions center around instruction.

The scoring criteria is the same for the other two HCA evaluation forms:
1 – Ineffective
2 – Partially Effective
3 – Effective
4 – Highly Effective
N/A – in the event a rubric does not apply to a particular position

Criterion	Rubric	Rubric	Rubric	Rubric
A. Job related major responsibilities				
1.Chief Academic Officer	1.1 Manage curriculum alignment, including alignment of categorically funded programs	1.2. Coordinate curriculum review process, curriculum development and implementation	1.3. Coordinate selection and ordering of curriculum materials	1.4 Disseminate scientific research to support improvement of curriculum and instruction
	1.5 Recommend PD and support implementation	1.6 Oversee the assessment program	1.7.Conduct formal evaluations of teachers as needed	1.8 Summarize and present student achievement results to the Board
2.Principals for Lower and Middle School Divisions	2.1 Oversee and support teachers and the PD implementation	2.2 Evaluate teacher candidates and make hiring recommend-ations to CEO	2.3 Formally evaluate all teachers in a division; recommend dismissal for ineffective teachers	2.4. Set and revise as needed the schedules for all teachers
	2.5 Develop with CAO systems to maximize student	2.6 Monitor grading policies, report cards, and	2.7 Oversee implementation of discipline policies and	2.8 Coordinate administration of state and national tests

	learning for all subgroups	communication to parents	recommend revisions to CEO	
3.Assistant Principal	3.1. Support the Principal in PD for teachers, teacher observations, and as directed by the principal	3.2. Manage student discipline	3.3. Coordinate auxiliary services and field lessons for students	3.4. Coordinate communication between home and school with parent conferences and progress reports
4.Special Education Coordinator	4.1 Maintain records for all SPED students	4.2 Organize the IEP process and ensure students are included in classrooms according to IEP	4.3. Manage required accommodations and modifications within the classrooms	4.4. Provide PD for teachers regarding SPED requirements and services
	4.5 Manage intake assessments and the evaluation/reevaluation process	4.6 Comply with all state, federal and school SPED regulations	4.7. Manage any issues that arise in regular classroom settings	4.8. Manage due process for SPED students and families
5. EL Specialist	5.1. Manages intake assessments for EL students	5.2.Coordinates appropriate program and services with teachers and counselors	5.3 Supports selection of curriculum materials for EL students	5.4. Ensures compliance with all state, federal laws and HCA policies
6. Master Teacher	6.1 Develop model lesson plans for HCA curriculum	6.2. Lead collaborative planning meetings and deep data dives to identify struggling students	6.3. Recommend intervention strategies for students performing below grade level	6.4. Provide PD, feedback, and other tools to support teachers in implementing HCA curriculum with fidelity
7. Counselor	7.1. Develop the character/virtue education curriculum	7.2 Oversee the implementation of this curriculum in class forums and advisory periods	7.3 Counsel with students and their families as needed when students are referred	7.4. Provide PD for teachers related to self-management and interpersonal relations
8. Social Worker	8.1. Provide PD on a trauma informed community and ACEs scores.	8.2. Provide support to students and their families when referred by teachers	8.3 Work with local organizations to solve family issues related to food, housing, etc.	8.4. Comply with all state, federal and HCA policies

9. Director of Enrollment and Community Outreach	9.1 Identifies and manages community partnerships to support the school programs	9.2. Develops in partnership with the Board Marketing Committee and annual student enrollment plan	9.3. Implements the enrollment plan to meet annual target enrollments	9.4. Manages the application, lottery if necessary, enrollment and orientation processes
B. Creating a Culture of Continuous Improvement				
Establish and sustain a school culture conducive to continuous improvement for students and staff	B.1. Develops and sustains focus on shared mission and clear vision for improvement of learning and teaching	B.2 Develops proficiency in systems thinking, quality tools, and continuous improvement	B.3 Facilitates collaborative processes leading toward continuous improvement	B.4 Creates opportunities for shared leadership
C. Leading with Data-Driven Decision Making				
Support the development, implementation and evaluation of data-driven decision	C.1, Recognizes and seeks out multiple data sources**.**	C.2. Analyzes and interprets multiple data sources to inform improvement efforts	C.3. Assists staff to use data to guide, modify and improve teaching and learning	C.4. Provides evidence of student growth that results from the Annual Action plan process
D. Aligning and Improving Curriculum, Instruction and Assessment				
Lead instructional staff in aligning curriculum, instruction and assessment with state standards, BCSI guidelines, and HCA goals	D.1 Alignment of curriculum to state standard, BCSI guidelines, and HCA goals	D.2 Develops systems to assist in implementing effective instructional and assessment practices	D.3. Monitors systems that assist implementation of effective practices	D.4. Supports staff in developing student growth plans and implementing tiered student supports as needed
E. Managing Human and Fiscal Resources				
Manage human and fiscal resources to accomplish student achievement goals	E.1 Manage human resources – hiring, assignments, contracting, substitutes, etc.	E.2. Provide ongoing PD and training to support development of faculty and staff	E.3. Manage fiscal resources to keep expenses in line with annual budget	E.4. Fulfill legal and policy responsibilities in managing resources
F. Engaging Families and Community				
Communicate and partner with school, education partners, and	F.1. Communicates	F.2. Communicates regularly to	F.3. Communicates regularly with	F.4. Communicates effectively with TEA

community members to promote student learning	regularly with parents using multiple modes to promote student learning and parent engagement	HCA education partners to promote student learning	community members to promote community engagement	and BCSI to ensure good working relationships
G. Closing the Gap				
Demonstrate a commitment to closing the achievement gap between any HCA subgroups	G.1 Identifies barriers to achievement for subgroups resulting in gaps	G.2. Recommends solutions to the barriers	G.3. Demonstrates a belief that ALL students can achieve at high levels and a commitment to closing any gaps	G.4. Analyzes data and provides evidence and reports to the CEO
H. Professionalism				
Exhibits professionalism in attitude, decorum, communication, and behavior toward all constituents	H.1 Demonstrates strong oral and written communication skills	H.2 Displays a positive role model for students	H.3. Fulfills all duties punctually	H.4. Accepts, evaluates and acts upon feedback
	H.5. Establishes a professional manner in both actions and dress	H.6. Demonstrates professionalism by being regular in attendance and punctual each day	H.7. Displays sound judgment and respect in all aspects of the position	H.8. Works collaboratively with colleagues

Attachment 20: Résumé(s) and/or Qualifications for Proposed Financial Team

(Attachment 20 is updated from Attachment 20 on pages 327-329 in the HCA charter application.)

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 (Attachment 23) are required for each position on the staffing chart. 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.

Job Descriptions for Proposed Financial Team

Chief Financial Officer (CFO))

The HCA CFO oversees all financial functions at HCA.

Responsibilities

Develop, deploy and manage the financial system, financial reporting and accounting consisten with HCA Board policies and procedures; collect public revenues; ensure proper cash management and management of accounts receivable and payable; manage daily financial and business activities; coordinate with back-office personnel to ensure timely and accurate bookkeeping and reconciliations; prepare monthly, quarterly, and annual financial statements and variance analyses in a timely manner; implement procedures to ensure compliance with grants and management of grant funds; coordinate with CEO and back-office personnel to prepare the school budget; oversee the negotiation of external operational vendor relationships; ensure proper asset management, compliance with GAAP standards, and adherence to budget. Engage in continuous evaluation of the financial health of school to identify and address any emerging financial obstacles to support the vision and mission of the school. Exemplify HCA core principles in all interactions with students, parents, faculty and staff.

Qualifications

- Bachelor's degree (MBA, MPA, JD or other relevant advanced certification preferred)
- Minimum 4-5 years of directly related experience, preferably in the financial department of a nonprofit or educational organization
- Certificate in public accounting
- Ability to apply critical thinking skills to complex systems and operations in a highly regulated industry
- Experience in analyzing and producing reports for management
- Excellent communication skills

Human Resources (HR) Manager

The HR Manager ensures compliance with relevant workplace and employment laws and regulations.

Responsibilities

The HR Manager will provide appropriate information and assistance to staff regarding personnel matters and benefits; provide effective and informed support and advice to the administrative team on personnel and HR issues; administer the employee benefits program, answer employee questions, support claims resolutions, and maintain relevant data and management systems; ensure all staff hold credentials required by law and pass background checks; ensure regular performance reviews are completed and documented; manage legal, personnel-related documentation, including employment statements of hiring, disciplinary procedures and terminations of employment; ensure staffing requirements are up-to-date with any new legal requirements; coordinate federal forms, checks, payroll and benefits for all HCA employees; work with the CFO and CEO/Superintendent to develop protocols for student, teacher, and parent follow-ups.

Qualifications

- Bachelor's degree required; Master's or advanced degree preferred
- 3-5 years in operations, human resources, and/or administration
- Excellent interpersonal skills and high ratings for confidentiality and trust
- Experience in managing records and producing reports as needed
- Exemplify HCA core principles in all interactions with students, families and adult team members

PEIMS Manager

The PEIMS Coordinator will be responsible for the reporting of district Public Education Information Management (PEIMS) data.

Responsibilities

PEIMS Manager will manage the collection, integration, and formatting of all data required for PEIMS submission according to TEA PEIMS data standards; run edits, reports and verification checks on data to ensure accuracy of information; responsible for the submission of fall, mid-year, summer and extended year programs reports to the state; verify data submitted to TEA and submit corrections in a timely manner; create and disseminates information on behalf of the PEIMS department; be responsible for assigning Texas State Service ID's for all state approved courses; comply with and submit TEA required PID Enrollment Tracking (PET) data weekly; review and research PET reports; and be responsible for Personal Identification Database (PID) reporting.

Qualifications

- Bachelor's degree
- At least two years of previous experience with PEIMS
- Ability to use personal computer and software to develop spreadsheets
- Ability to perform data analysis
- Ability to maintain accurate and auditable records
- Ability to perform basic math and meet established deadlines
- Strong organizational, communication and interpersonal skills

(As the school reaches capacity, HCA may choose to hire a financial clerk and a data entry clerk to support the CFO and PEIMS Manager.)

Attachment 21: Résumé(s) and/or Qualifications for Proposed Operations Team

(Attachment 21 is updated from Attachment 21 on pages 331-332 in the HCA GEN 25 charter application.)

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 (Attachment 23) are required for each position on the staffing chart. 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.

Job Descriptions for Proposed Operations Team

Chief Operations Officer (COO)

The Chief Operating Officer will manage day-to-day operations for HCA.

Responsibilities

The Chief Operating Officer will develop, manage, and implement operational school systems; oversee the areas of technology and student data; oversee compliance, credential management (along with HR Manager), and enrollment and student records including external reporting and regulatory compliance; oversee the management of meal programs and receipts, procurement, school safety, transportation, food service, after school and summer programs, facility maintenance, and asset tracking. He/she will work closely with the CEO/Superintendent and Chief Financial Officer to achieve the school's mission of achievement for all students, The COO will manage all vendor relationships for auxiliary functions.

Qualifications

- Bachelor's degree
- 3-5 years of experience in operations, human resources, and/or administration
- Comfort with working in a fast-paced, entrepreneurial environment for a non-profit
- Commitment to vision, mission, and principles of HCA
- Excellent project management, budget and organizational skills
- Extraordinary attention to detail and ability to multi-task
- Proficiency in Microsoft Excel, PowerPoint, Word and outlook
- Superb leadership skills with a results-oriented team player attitude
- Experience in non-profit or educational field a plus

IT Director

The IT Coordinator will be responsible for supervising all HCA IT operations.

Responsibilities

Establish technology standards and requirements; oversee and manage the design, implementation, delivery, monitoring and administration of IT services. Ensure consistency and stability of networks and educational software, including hosted licensed applications and on-site purchased applications; ensure all IT equipment is in excellent working condition; assist in school website updates; assist with strategic planning as it pertains to IT; supervise and support site IT operations; assist educational staff as needed to identify, implement and administer software programs; train staff in IT and use of digital tools.

Qualifications

- Bachelor's Degree
- At least two years of technology experience, preferably in a school setting
- Working knowledge of Mac and PC operating systems

- Working knowledge of Microsoft Office products and applications as they apply to a school setting
- Knowledge of internal network operations and Microsoft Windows server operating system
- Working knowledge of Google domain and all related applications as applied to education
- Knowledge of educational software and digital tools for students
- Comfort in an educational environment
- Supervisory experience preferred
- Classroom and instructional experience preferred to support teachers.

(Note: IT Director will also be part of the Instructional Leadership Team.)

Facilities Manager (This position will come in after the first 5 years)

The Facilities Manager reports to the COO and is responsible for managing the security vendor who provides security services for the school, custodians and other cleaning vendors to maintain the cleanliness and excellent appearance of all school facilities as well as the functioning of all systems in the school.

Responsibilities

The Facilities Manager is responsible for managing the security vendor for the school ensuring the safety of the school; maintaining the mechanical, electrical, and plumbing systems; overseeing the cleaning of the facilities and grounds in partnership with custodians and any night cleaning crews and landscaping vendors; developing protocols for classroom clean up at the end of the day for teachers and students to execute; cleaning up emergency situations during the school day.

Qualifications

- High School Diploma; AA or BA preferred
- 3-5 years of experience as a custodian or maintenance manager in a school or other nonprofit that involves children
- Professionalism, punctuality, and a service orientation
- Commitment to the vision of HCA.

Food Service Manager (Note: This position will come in after the first 5 years)

The Food Service Manager reports to the Chief Operating Officer and is responsible for developing the preparation and serving of healthy meals for the students and staff to enjoy and ensuring all food safety.

Responsibilities

The Food Service Manager is responsible for overseeing the food service for the school; developing food service budgets, managing those budgets, and preparing reports for the COO; maintaining the cleanliness of the kitchen and serving areas; developing the breakfast, lunch and snack menus; procuring and safely storing all food items; recommending to the COO whether to

hire an external food service vendor or provide food service in-house; if the COO decides to provide food service in-house, recommending food service employees for hiring and providing their training; developing a service orientation among food service staff; developing and implementing protocols for staff and students to clean up after themselves in the lunchroom and classroom areas.

Qualifications

- High School Diploma; AA or BA preferred
- 3-5 years of experience as a food service manager in a school or other nonprofit that involves children
- Ability to manage vendors and supervise staff
- Ability to develop budgets, meet those budgets, and prepare reports for supervisors
- Professionalism, punctuality, and a service orientation
- Commitment to the vision of HCA

Attachment 22: Staffing Chart

(Attachment 22 is updated from Attachment 22 on pages 333-336 in the HCA GEN 25 charter school application.)

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, describe how the teacher-student ratio was calculated in the final row of the table.

Attachment 22: Staffing Chart

Positions	Staffing Chart					
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**At capacity**
Central Office						
CEO/Superintendent	1	1	1	1	1	1
Chief Financial Officer	1	1	1	1	1	1
Chief Operating Officer	0	0	0.5	1	1	1
Chief Academic Officer	0	0	0	1	1	1
PEIMS Manager	1	1	1	1	1	1
Data Entry Clerk	0	0	0	0	1	1
IT Director	.5	.5	.5	1	1	1
HR Director	0	0	0	1	1	1
Director of Enrollment/Community Outreach	.5	1	1	1	1	1
Alumni Coordinator	0	0	0	0	0	1
Special Education Coordinator	1	1	1	1	1	1
EL Specialist	1	1	1	1	1	1
Food Service Manager	0	0	0	0	0	1
Facilities Manager	0	0	0	0	0	1
Office Manager	1	1	1	1	1	1
Nurse	0.5	1	1	1	1	1
Total Central Office FTEs	7.5	8.5	9	12	12	16
Elementary School Campus Staff						
School Leaders						
Lower School Head/Principal (PK-4)	1	1	1	1	1	1
Assistant Principal	0	0	1	1	2	2
Teachers						
PK3	0	0	0	2	2	2
PK4 Gen Ed	0	0	2	2	2	2
PK 4 Master	0	0	1	1	1	1
K Gen Ed	2	2	2	2	2	2
K Master	1	1	1	1	1	1

Positions	Staffing Chart					
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**At capacity**
Grade 1 Gen Ed	2	2	2	2	2	2
Grade 1 Master	1	1	1	1	1	1
Grade 2 Gen Ed	0	2	2	2	2	2
Grade 2 Master	0	1	1	1	1	1
Grade 3 Gen Ed	0	0	2	2	2	2
Grade 3 Master	0	0	1	1	1	1
Grade 4 Gen Ed	0	0	0	2	2	2
Grade 4 Master	0	0	0	1	1	1
Grade 5 Gen Ed	0	0	0	0	2	2
Grade 5 Master	0	0	0	0	1	1
Teachers-in-Residence/Aides	2	3	6	9	10	10
Teachers (specials, e.g., art)						
Art Teacher	.25	.5	1	1	1.5	1.5
Music Teacher	.25	.5	1	1	1.5	1.5
Physical Education Teacher	.5	1	1	1.5	2	2
Science Specialist	.25	.5	.5	1	1	1
Spanish Specialist	.25	.5	1	1	1	1
Latin Specialist	0	0	0	.5	1	1
Teachers, ESL/Bilingual	2	3	5	6	7	7
Teachers, Special Education	0.5	1	1	2	2	2
Student support staff						
Counselor	1	1	1	1	1	1
Social Worker	0.5	0.5	1	1	1	1
Campus Operations						
Office Clerk	0	1	1	1.5	3	3
Custodian	1	1	2	2	2	2
Total elementary FTEs	**15.5**	**23.5**	**38.5**	**50.5**	**60**	**60**
Middle School Campus Staff						
School Leaders						
Middle School Principal	0	0	0	0	0	1
MS Assistant Principal	0	0	0	0	0	1

Positions	Staffing Chart					
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**At capacity**
Teachers (separate line for each grade or core subject)						
English/Language Arts	0	0	0	0	0	3
Math	0	0	0	0	0	3
Science	0	0	0	0	0	3
History	0	0	0	0	0	3
Latin	0	0	0	0	0	4
Teacher (specials, e.g., art)						
Art	0	0	0	0	0	1
Music	0	0	0	0	0	1
Athletics/PE	0	0	0	0	0	1
Computer Science	0	0	0	0	0	1
Teacher, ESL/Bilingual	0	0	0	0	0	4
Teacher, Special Education	0	0	0	0	0	1
Student support staff (e.g., paraprofessionals, counselors)						
Counselor	0	0	0	0	0	1
Social Worker	0	0	0	0	0	1
Campus Operations						
Office Clerk	0	0	0	0	0	1
Custodian	0	0	0	0	0	1
Total middle school FTEs	0	0	0	0	6	31
Total charter school staff	23	32	47.5	62.5	72	107
Total teachers (general ed, master, specialists, ESL/Bilingual, teacher aides)	12	19	31.5	43	50	75
Student Enrollment	192	288	472	656	756	1056

Positions	Staffing Chart					
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**At capacity**
Teacher-student ratio*	1/16	1/15.2	1/15	1/15.3	1/15.1	1/14.1

***The teacher-student ratios for this staffing chart are calculated by dividing the total school enrollment by the sum of all of the teachers including general ed, master, specialists, special education, ESL/Bilingual, and teacher aides. The teacher-student ratios on the applicant cover sheet do not include teacher aides.*

Attachment 23: Supplemental Human Resources Information Forms

(Attachment 23 is updated from Attachment 23 on pages 337-398 in the HCA GEN 25 charter application.)

Using the template provided in the *Additional Attachments PDF Forms* document on the New Operator 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.

CURED DURING REMEDY PERIOD

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Security Manager

Reports to: Chief Operations Officer

Salary Range: $ 48,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Associate's degree or higher.

Experience Required: At least 2 years of experience in a security supervisory position in a school setting.

Certification Required: N/A

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 online 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	214,175	$54,545-$76,364
Aldine ISD	101903	Houston	67,331	$52,009-$104,244

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Security Manager

Reports to: Chief Operations Officer

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Responsible for overall campus safety and maintaining a positive environment.
2. Coordinate, supervise and support personnel and program activities wtih regard to security.
3. Serve as safety officer and coordinate on-going safety training for staff, teachers, and students.
4. Assist with student disciplinary cases, as needed.
5. Follow and enforce campus rules, regulations, safety policies and procedures.
6. Ensure security protocols are enforced for maintenance, housekeeping, and shipping & receiving activities.
7. Serve as a liaison with the police department and other outside agencies regarding calls/ investigations on campus.
8. Participate in annual trainings to stay current on laws, policies and procedures regarding school safety.
9. Maintain reports of school crimes/violence and maintains statistics regarding this information.
10. Perform other job-related duties, as assigned.

GENERATION 26 SUPPLEMENTAL HR FORM-CEO

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed.

Position Title: CEO/Superintendent

Reports to: Charter Holder Board of Directors

Salary Range: $130,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 154 In year five: 756

Minimum Qualifications Required:

Education Required: Master's degree or higher.

Experience Required: At least 2-5 years of administrative experience as a principal or other school administrator.

Certification Required: Principal certificate or equivalent issued by the TEA or completed the Superintendent certificate application and been approved by TEA.

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 online 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	214,175	$345,000
Aldine ISD	101903	Houston	69,768	$287,798

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed.

Position Title:	CEO/Superintendent
Reports to:	Charter Holder Board of Directors

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1.	Recruit, hire, supervise and evaluate elementary and secondary principals and assistant principals.
2.	Coordinate and monitor the activities of school principals and school operations, including educational, curricular and financial systems
3.	Assist staff/students/parents/community with interpretations of policies, regulations and agreements related to elementary and secondary activities and programs.
4.	Collect and analyze data relative to the school improvement process and ensure HCA students are meeting performance goals.
5.	Identify problem areas in school improvement with the appropriate departments and resolve these concerns in an effective and confidential manner.
6.	Monitor the recruitment, selection, placement, training, promotion, transfer, compensation and termination of all school personnel.
7.	Attend district, board, special education, community, and committee meetings to present reports and answer inquiries concerning the school.
8.	Recruit, hire and manage the Chief Financial Officer, Chief Operations Officer, Chief Academic Officer and Director of Enrollment and Community Relations.
9.	Ensure compliance with all local, state and federal laws.
10.	Ensure the safety of all members of the school community.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Chief Financial Officer

Reports to: CEO/Superintendent

Salary Range: $100,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher. MBA preferred.

Experience Required: At least 4 years of financial management level experience.

Certification Required: Public accountant 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 online 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	214,175	$71,335-$117,702
Aldine ISD	101903	Houston	67,331	$100,000-$151,48

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed.

Position Title:	Chief Financial Officer
Reports to:	CEO/Superintendent

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Supervise the management of the financial affairs of the school.
2. Assume responsibility for budget development and long-range financial planning.
3. Supervise the collection, safekeeping, and distribution of all funds.
4. Act as an advisor to the CEO/Superintendent on all questions relating to the business and financial affairs of the school.
5. Analyze and interpret the financial status of the charter school and prepare necessary reports for the community, Board, and TEA.
6. Review annually the budgets of all departments and divisions.
7. Create periodic financial reports of revenue and expenditure compared to budget projections.
8. Perform other job-related duties as assigned.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Chief Operating Officer (.5 Year 3)

Reports to: CEO/Superintendent

Salary Range: $85,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 3 years of business, operational, and/or managerial experience.

Certification Required: N/A

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 online 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	214,175	$86,315-$114,367
Aldine ISD	101903	Houston	67,331	$169,950-$205,36

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Chief Operationg Officer (.5 Year 3)
Reports to:	CEO/Superintendent

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Develop, manage, and implement strategic operational school systems.
2. Develop and oversee the budget for the school's auxiliary services.
3. Oversee daily administrative operations, including establishing work priorities and assisting in resolving problems related to day-to-day operations of the school.
4. Identify and recommend to the CFO and CEO/Superintendent vendors for auxiliary services.
5. Manage the schools auxiliary services such as transportation, food service, maintenance, IT, and security and vendor relationships.
6. Manage and inspect the use of the school campus and grounds to ensure a clean, orderly and safe environment.
7. Maintain campus security to be in accordance with local, state, and federal laws, and insurance regulations.
8. Conduct regular audits and monitor quality control measures for services provided to the school system.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Chief Academic Officer (Year 4)

Reports to: CEO/Superintendent

Salary Range: $90,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Master's Degree.

Experience Required: At least 3 years of teaching experience and at least 2 years experience as a CAO or Director of Curriculum and Instruction.

Certification Required: Teacher 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 online 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	214,175	$94,947-$156,662
Aldine ISD	101903	Houston	67,331	$169,950-$205,36

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Chief Academic Officer (Year 5)

Reports to: CEO/Superintendent

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Manage a large team that supports students, staff and educators.
2. Identify the core components of the academic program to meet federal and state law performance measures.
3. Develop and implement the school's organizational and academic goals and objectives in close collaboration with board members, directors and school leaders.
4. Ensure that the most effective instructional materials and appropriate technology are being adopted in the classroom.
5. Lead a teaching and learning team that supports effective professional development, transition and mentorship, and ongoing support.
6. Develop, implement, and evaluate instructional programs with directors, school leaders, and lead teachers.
7. Use all available evaluation data to direct modifications, deletions, or additions to the school's instructional programs.
8. Provide assistance to school leaders in the development of the Campus Improvement Plan.
9. Respond appropriately to situations that could impair the teaching/learning process or could threaten safety and the well-being of students and staff.
10. Perform other job-related duties as assigned.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: PEIMS Manager

Reports to: Chief Financial Officer (Year 1)

Salary Range: $55,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years of PEIMS data experience.

Certification Required: N/A

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 online 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	214,175	$58,954-$97,275
Aldine ISD	101903	Houston	67,331	$52,009-$104,244

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: PEIMS Manager

Reports to: Chief Financial Officer

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Manage the collection, integration, and formatting of all data required for PEIMS submission.
2. Responsible for edits, reports, and verification on data to ensure accuracy of information.
3. Responsible for submitting PEIMS data periodically to TEA.
4. Create training materials and provides staff development in proper record keeping to support accurate PEIMS reporting.
5. Communicate with TEA and related agencies when needed to clarify or ensure compliance with proper record keeping and data reporting.
6. Proposes guidelines for the accurate collection of student enrollment, attendance, and discipline data.
7. Maintain up to date software to ensure all settings and codes are correct and accurate.
8. Perform internal audits to ensure data accuracy.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Date Entry Clerk

Reports to: PEIMS Manager

Salary Range: $35,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 668

Minimum Qualifications Required:

Education Required: High school diploma or GED.

Experience Required: At least 2 years of experience using computer applications in an office setting.

Certification Required: N/A

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 online 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	214,175	$29,120-$40,273
Aldine ISD	101903	Houston	67,331	$27,480-$51,070

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Date Entry Clerk
Reports to:	PEIMS Manager

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1.	Perform all necessary activities related to date extraction and reporting for District, State and Federal requirements.
2.	Maintain accurate attendance, suspensions, tardies, make-up, and drop-out records.
3.	Assist with attendance data requirements for District and state testing programs.
4.	Monitor and report on early dismissals.
5.	Serve as liaison between District and school level program administrators to ensure accurate and effective use of data.
6.	Handles confidential documents in an appropriate manner and records employee/student information to computer, as assigned.
7.	Provide administrative support in such areas as compiling data, analyzing data, preparing statistical reports, and compiles and maintains various records systems.
8.	Perform other job-related duties, as assigned.
9.	
10.	

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Director of Information Technology (5

Reports to: Chief Operating Officer (Starting Year 1

Salary Range: $65,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years of information technology experience, preferably in a school setting.

Certification Required: N/A

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 online 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	214,175	$80,770-$133,271
Aldine ISD	101903	Houston	67,331	$73,843-$121,034

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Director of Information Technology

Reports to: Chief Operations Officer (Starting Year

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Establish technology standards and requirements in the school.
2. Develop creative and innovative solutions regarding processes, directions and methodologies.
3. Oversee and manage design, implementation, delivery, monitoring and administration of applicable IT services and technologies.
4. Keep current with changing innovations in education technology and products.
5. Assign projects and establish performance metrics for staff based on overall goals.
6. Work with Chief Financial Officer to plan a technology budget.
7. Provide training and technology guidance to staff and teachers.
8. Recommend and manage the purchase of computers and software for students and staff.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Human Resources Director (Year 4)

Reports to: Chief Financial Officer

Salary Range: $60,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 3 years of HR generalist experience in schools, businesses or nonprofit settings preferred.

Certification Required: N/A

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 online 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	214,175	$68,363-$112,798
Aldine ISD	101903	Houston	67,331	$93,000-$143,500

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Human Resources Director

Reports to: Chief Financial Officer

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Assist in communicating the schools policies and procedures regarding HR.
2. Develop job postings and recruit for open positions.
3. Serve teachers, staff and school administrators by handling day-to-day questions and helping resolve work related problems.
4. Administer employee benefit programs, answer employee questions, support claim resolution, and maintain related systems.
5. Support the performance review process; provide teacher, staff and school administrators with information about the process, policies, job duties, and process for promotion.
6. Maintain employee records that are in compliance with state laws.
7. Ensure compliance with applicable employment laws and regulations.
8. Perform other job-related duties as assigned.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed.

Position Title: Director of Enrollment/Community O

Reports to: CEO/Superintendent

Salary Range: $60,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years working in student recruitment and enrollment in a school. Marketing/PR experience. Experience developing and managing relationships with community partners.

Certification Required: N/A

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 online 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	214,175	$71,335-$117,702
Aldine ISD	101903	Houston	67,331	$100,000-$151,48

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Director of Enrollment/Community O

Reports to: CEO/Superintendent

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Develop partnerships with non-profits, corporations, businesses, civic organizations, and other community organizations.
2. Establish and execute strategic time-frame, goals, and priorities for the school to recruit and enroll students.
3. Enhance the involvement of parents and individuals in the community to volunteer in the schools.
4. Write grant applications when the opportunity or necessity requires it.
5. Support fundraising activities and events that support the schools initiatives and build community.
6. Ensures compliance with all charter schools laws regarding student enrollment, including managing the lottery if necessary.
7. Develop and manage PR and marketing materials -- print and digital including the website.
8.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed.

Position Title: Alumni Coordinator (Full-scale)

Reports to: Director of Enrollment/Community Re

Salary Range: $56,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 154 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years of volunteer management or alumni relations.

Certification Required: N/A

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 online 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	214,175	$53,595--$88,432
Aldine ISD	101903	Houston	69,768	$58,894-$102,383

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed.

Position Title: Alumni Coordinator (Full-scale)

Reports to: Director of Enrollment/Community Re

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Develop programs with current students to help them stay connected and increase attendance at events.
2. Manage all logistics for alumni events throughout the school year.
3. Perform research, visit sites and look for resources to aid possible alumni events.
4. Track and maintain computer records of every alumni.
5. Use social media and other types of communication to keep alumni aware of events.
6. Coordinate with school and community to bring together resources for alumni.
7. Support students in matching HCA students with excellent high school options after grade 8.
8. Perform other job-related duties as assigned.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Special Education Coordinator

Reports to: Chief Academic Officer (Year 5)

Salary Range: $67,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Master's degree in Special Education.

Experience Required: At least 2 years of teaching experience as a special education classroom teacher.

Certification Required: Certificate in Special Education.

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 online 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	214,175	$46,693-$77,042
Aldine ISD	101903	Houston	67,331	$56,000-$89,429

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Special Education Coordinator

Reports to: Chief Academic Officer (Year 4)

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Assist in the reccomendation and adaption of school policies to include special education needs.
2. Keep informed and ensure compliance with all legal requirements governing special education.
3. Supervise and coordinate new special education programs and the improvement of existing programs.
4. Establish procedures for placement, evaluation, assignment, and re-appraisal of students with regard to the special education services program.
5. Assist in recruitment, selection, and recommendation for hiring of any special education personnel.
6. Gather and maintain all reports, records, and other documents legally required for special education programs.
7. Approve all supplies, materials, and texts used by special education and general classroom teachers.
8. Write grant applications when the opportunity or necessity requires it.
9. In the first two years, provide instruction as needed for special education students.
10. Perform other job-related duties as assigned.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: EL Specialist

Reports to: Lower/Middle Principal

Salary Range: $60,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher, preferably in teaching English as a Second Language.

Experience Required: At least 2 years of teaching experience as an English as a Second Language teacher.

Certification Required: Teacher certification. Certification in ESL or bilingual 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 online 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	214,175	$56,498-$93,222
Aldine ISD	101903	Houston	67,331	$56,000-$71,738

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	EL Specialist
Reports to:	Lower/Middle Principal

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Plan, prepare, and deliver lesson plans and instructional materials for EL students that facilitate active learning in English.
2. Use a variety of learning materials and relevant technology to support and differentiate instruction.
3. Observe and evaluate student's performance, progress and use data to adjust teaching strategies.
4. Assign and grade class work, homework, tests and assignments as requested by teachers.
5. Prepare and maintain accurate and complete records of students' progress and development.
6. Communicate necessary information regularly to students, colleagues, and parents regarding student progress and student needs.
7. Participate in coaching and appropriate professional development activities for teachers.
8. Ensure compliance with the policies, rules, and regulations regarding the English Learners.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Food Service Manager (At Capacity)

Reports to: Chief Operating Officer

Salary Range: $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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: High school diploma or GED.

Experience Required: 2 years experience in food service in a school

Certification Required: N/A

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 online 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	214,175	$24,080-$36,917
Aldine ISD	101903	Houston	67,331	$29,763-$49,849

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Food Service Manager

Reports to: Chief Operating Officer

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Manage production of all foods as assigned, using the approved recipes and stated quantities according to the food production records.
2. Apply safe handling of equipment and food.
3. Comply with required safety procedures set by the state.
4. Responsible for security and use of all foods provided for the daily food preparation.
5. Adhere to approved policies and procedures regarding food preparation and serving.
6. Keep record of equipment maintenance and inventory of food supplies.
7. Perform cleanup activities of food production equipment in coordination with custodians.
8. Participate in selection of and manage other food service vendors or workers
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Facilitites Manager

Reports to: Chief Operations Officer

Salary Range: $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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 668

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 3 years of experience in a supervisory capacity in property management.

Certification Required: N/A

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 online 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	214,175	$58,954-$97,275
Aldine ISD	101903	Houston	67,331	$73,843-$121,034

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Facilitites Manager
Reports to:	Chief Operations Officer

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Oversee all aspects of the school's facility management to ensure the cleanliness, safety and security of school buildings and grounds.
2. Draw up maintenance schedules and set routine programmes for cleaning and maintenance staff.
3. Responsible for overall security arrangement of the premises, ensure use of alarm systems, and monitor use of security cards/keys within the facility.
4. Review heating, electricity and water usage and advise on proposals for energy saving methods.
5. Responsible for the upkeep of playing fields, all weather surfaces, and roads within the school premises.
6. Ensure statutory elements of health and safety are implied and monitoring first aid and emergency supplies/ equipments.
7. Maintain manual and electronic documents, files, and records for state compliance purposes.
8. Collaborate with staff, students, parents and community organizations to gather and convey information to ensure effective use of school facility.
9. Responsible for installation and maintenance of all firefighting and fire alarm systems in co-operation with the Fire Dept.
10. Perform other job-related duties, as assigned.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Office Manager

Reports to: Chief Operations Officer

Salary Range: $47,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 3 years of experience in management in an office or school setting.

Certification Required: N/A

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 online 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	214,175	$64,850-$107,002
Aldine ISD	101903	Houston	67,331	$73,843-$121,034

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Office Manager
Reports to:	Chief Operations Officer

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Oversee non-instructional initiatives and campus operations, including facility, financial, and personnel management.
2. Manage, train and evaluate non-instructional staff.
3. Liaison for maintenance, repairs and construction projects.
4. Evaluate and implement facility resources, improvement plans, and policies and procedures.
5. Find solutions to varies operations questions and concerns.
6. Manage campus financial activities and administer/audit budget and payroll.
7. Maintain manual and electronic documents, files, and records for state compliance purposes.
8. Collaborate with staff, students, parents and community organizations to gather and convey information to ensure effective campus operations.
9. Coordinate a variety of programs and activities for staff, students and parents.
10. Perform other job-related duties, as assigned.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Nurse (Starts .5 in year 1)

Reports to: Chief Academic Officer (Year 4)

Salary Range: $55,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Nursing Degree.

Experience Required: At least two years experience working as a professional nurse in a medical or school setting.

Certification Required: Nursing 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 online 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	214,175	$57,926
Aldine ISD	101903	Houston	67,331	$56,000-$71,738

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Nurse
Reports to:	Chief Academic Officer (Year 4)

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Provide health-related education to students and staff in both individual and group settings.
2. Identify problems in the earliest stages, health care procedures, and the development of healthcare plans.
3. Oversee interventions and referrals to ensure educational success.
4. Partner and perform health screenings with community healthcare providers.
5. Monitor immunizations, manage infection control measures, and assess the school environment to prevent injury and ensure safety.
6. Oversee medication administration and special procedures according to physician orders.
7. Assist families with locating outside care and obtaining health insurance.
8. Notify parents of accident or illness and secure medical care for students in emergency cases, if parents or emergency contact cannot be reached.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Lower School Principal (Year 1)

Reports to: CEO/Superintendent

Salary Range: $82,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Master's degree or higher.

Experience Required: At least 2 years of teaching experience as a classroom teacher. At least 2 years of experience as an assistant principal or principal. Completed an approved principal educator preparation program.

Certification Required: Valid teaching 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 online 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	214,175	$75,813-$76,563
Aldine ISD	101903	Houston	67,331	$87,000-$130,986

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Lower School Principal
Reports to:	CEO/Superintendent

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Uphold school vision, mission, goals and school policies.
2. Work with teachers to develop and implement the HCA curriculum and instruction with fidelity.
3. Create benchmarks for teachers and student and oversee the collection and analysis of data to track progress and performance.
4. Develop programs to improve teacher performance and professional development to assist students better.
5. Provide guidance to teachers and school leaders to create an open and respectful school environment.
6. Participate in the recruitment and hiring of Lower School teachers.
7. Respond to concerns from teachers, staff, students and parents.
8. Manage the evaluation of Lower School teachers and make recommendations to the CEO/Superintendent if dismissal is necessary.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Middle School Principal (Year 6)

Reports to: CEO/Superintendent

Salary Range: $82,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Master's degree or higher.

Experience Required: At least 2 years of teaching experience as a classroom teacher. At least 2 years of experience as an assistant principal or principal. Completed an approved principal educator preparation program.

Certification Required: Valid teaching 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 online 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	214,175	$96,900-$107,100
Aldine ISD	101903	Houston	67,331	$87,000-$130,986

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Middle School Principal (Year 6)
Reports to:	CEO/Superintendent

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Uphold school vision, mission, goals and school policies.
2. Work with teachers to develop and implement the HCA curriculum and instruction with fidelity.
3. Create benchmarks for teachers and student and oversee the collection and analysis of data to track progress and performance.
4. Develop programs to improve teacher performance and professional development to assist students better.
5. Provide guidance to teachers and school leaders to create an open and respectful school environment.
6. Participate in the recruiting and hiring of Middle School teachers.
7. Respond to concerns from teachers, staff, students and parents.
8. Evaluate teachers several times a year and recommend renewal or non renewal of contracts to the CEO/ Superintendent.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Assistant Principal

Reports to: Lower/Middle School Principal

Salary Range: $67,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 3 years of teaching experience and additional leadership experience preferred.

Certification Required: Texas teacher certification; principal certification preferred as well

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 online 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	214,175	$64,610-$92,770
Aldine ISD	101903	Houston	67,331	$61,170-$106,340

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Assistant Principal

Reports to: Lower/Middle School Principal

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Supervise campus operations in Head of School's absence.
2. Assist in communicating, collaborating, and building strong relationships with staff, teachers, students, parents and community partners.
3. Develop, maintain, and use information systems to record and track progress on performance objectives and academic indicators.
4. Observe teacher performance, conduct teacher evaluations, and participate in professional development.
5. Assist in interviewing, selecting and mentoring of staff and teachers.
6. Participate in developing and evaluating class schedules, instructional programs, and extracurricular activities.
7. Help develop student discipline management system that results in positive student behavior.
8. Work with department heads and staff to compile annual budget request.
9. Demonstrate awareness of school-community needs and initiate activities to meet those needs.
10. Perform other job-related duties, as assigned.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Teacher

Reports to: Lower/Middle School Principal

Salary Range: $57,500-$59,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years of teaching experience as a general education teacher or a teacher in a specialist area such as art or music.

Certification Required: Teacher certification is preferred. It is required for any bilingual education teachers.

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 online 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	214,175	$54,369-$96,371
Aldine ISD	101903	Houston	67,331	$56,000-$71,738

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Teacher
Reports to:	Lower/Middle School Principal

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Plan, prepare and deliver lesson plans following the HCA curriculum that facilitates engaged student learning.
2. Use a variety of learning materials and relevant technology to support and differentiate instruction.
3. Observe and evaluate student's performance and development.
4. Encourage and monitor the progress of individual students and use data to adjust teaching strategies to ensure all students are learning at high levels.
5. Assign and grade class work, homework, tests and assignments and send weekly folders to families.
6. Prepare and maintain accurate and complete records of students' progress and development.
7. Manage student behavior in the classroom by establishing and enforcing rules and procedures.
8. Communicate necessary information regularly to students, colleagues, and parents regarding student progress and student needs.
9. Participate in appropriate professional development activities.
10. Perform other job-related duties as assigned.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Master Teacher

Reports to: Lower/Middle School Principal

Salary Range: $58,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 168 In year five: 668

Minimum Qualifications Required:

Education Required: B.A. Degree; Master's preferred

Experience Required: At least 3 years of teaching experience; experience leading team of teachers.

Certification Required: Teacher 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 online 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	214,175	$54,369-$96,371
Aldine ISD	101903	Houston	67,331	$56,000-$71,738

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Master Teacher
Reports to:	Lower/Middle School Principal

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Plan, prepare and deliver lesson plans that facilitate engaged student learning.
2. Use a variety of learning materials and relevant technology to support and differentiate instruction.
3. Encourage and monitor the progress of individual students and use data to adjust teaching strategies.
4. Prepare and maintain accurate and complete records of students' progress and development.
5. Demonstrate above average class growth on assessments administered to students.
6. Communicate necessary information regularly to students, colleagues, and parents regarding student progress and student needs.
7. Collaborate with other teacher and staff to problem-solve and develop learning experiences to support students.
8. Participate in regular staff development activities that are targeted to Master Teachers to improve teaching skills.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Specialist Teacher

Reports to: Lower/Middle School 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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years of teaching experience in the area of speciality, such as art, music , Spanish, science and PE.

Certification Required: Teacher certification is preferred. It is required for any bilingual education teachers.

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 online 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	214,175	$54,369-$96,371
Aldine ISD	101903	Houston	67,331	$56,000-$71,738

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Specialist Teacher

Reports to: Lower/Middle School Principal

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Plan, prepare and deliver lesson plans that facilitate engaged student learning in speciality areas such as art, music, science, Spanish and PE.
2. Use a variety of learning materials and relevant technology to support and differentiate instruction.
3. Encourage and monitor the progress of individual students and use data to adjust teaching strategies.
4. Assign and grade class work, homework, tests and assignments and send weekly folders to families.
5. Prepare and maintain accurate and complete records of students' progress and development.
6. Communicate necessary information regularly to students, colleagues, and parents regarding student progress and student needs.
7. Participate in appropriate professional development activities.
8. Perform other job-related duties as assigned.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Special Education Teacher

Reports to: Lower/Middle School Principal

Salary Range: $57,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years of teaching experience as a special education teacher.

Certification Required: Teacher and Special education 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 online 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	214,175	$54,369-$96,371
Aldine ISD	101903	Houston	67,331	$56,000-$71,738

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Special Education Teacher

Reports to: Lower/Middle School Principal

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Plan, prepare and deliver lesson plans that reflect understanding of the learning styles and needs of students.
2. Use appropriate learning materials and relevant technology that reflect understanding of the learning styles and needs of students.
3. Encourage and monitor the progress of individual students and use data to adjust teaching strategies.
4. Participate in ARD committee and develop IEP for eligible students.
5. Manage student behavior in the classroom by establishing and enforcing rules and procedures.
6. Prepare and maintain accurate and complete records of students' progress and development.
7. Communicate necessary information regularly to students, colleagues, and parents regarding student progress and student needs.
8. Participate in appropriate professional development activities.
9. Perform other job-related duties as assigned.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Teacher Aide

Reports to: Lower School Principal

Salary Range: $26,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: High School Diploma/GED.

Experience Required: At least 1 year as Teacher's Aide in a school setting.

Certification Required: N/A

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 online 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	214,175	$22,816-$27,737
Aldine ISD	101903	Houston	67,331	$18,856-$35,812

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Teacher Aide
Reports to:	Lower School 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 teacher in devising strategies to reinforce material taught based on the students needs, interests and abilities.
2. Work with individual students or small groups of students to reinforce learning of material or skills as introduced by the teacher.
3. Prepare and develop students' records, folders, and teaching aides such as charts and graphs.
4. Operate and care for equipment and instructional materials.
5. Assist students in the library, computer lab, cafeteria, and during emergency drills.
6. Collects and distribute papers, make-up work, tests and other materials for instruction.
7. Assist the teacher in the implementation of students' behavior plans.
8. Perform other tasks as assigned by the teacher or school leader.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Counselor (Begins in Year 1)

Reports to: Lower/Middle Principal

Salary Range: $57,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Master's degree or higher.

Experience Required: At least 2 years of experience as a school counselor.

Certification Required: School Counselor 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 online 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	214,175	$58,954-$97,275
Aldine ISD	101903	Houston	67,331	$56,618-$98,426

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed

Position Title:	Counselor
Reports to:	Lower/Middle Principal

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Develop, implement, and evaluate a comprehensive counseling and guidance program.
2. Consult with parents, teachers, administrators, and other relevant individuals to enhance their work with students.
3. Coordinate with school and community personnel to bring together resources for students.
4. Assist individuals and small groups of students with presenting needs or concerns.
5. Guide students and others to use special programs and services.
6. Assist teachers in the teaching academic field lessons to enhance learning opportunities.
7. Assist students in middle school course selection, high school selection, and possible career options.
8. Perform other job-related duties as assigned.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Social Worker (.5 in years 1 and 2)

Reports to: Lower and Middle School Principals

Salary Range: $57,500

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: Bachelor's degree or higher.

Experience Required: At least 2 years of experience as a social worker.

Certification Required: Social worker license.

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 online 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	214,175	$45,607
Aldine ISD	101903	Houston	67,331	$52,009-$104,244

Name of Proposed Charter School:	Heritage Classical Academy
Name of Sponsoring Entity:	Heritage Ed.

Position Title:	Social Worker
Reports to:	Lower and Middle School Principals

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Provide case management for students and families requiring multiple services and/or resources such as referral for mental health, health services, and basic needs with private and governmental agencies.
2. Identify and assess the needs of students for placement in appropriate educational settings.
3. Make regular home visits to homes as applicable.
4. Provide training to school staff, parents, and appropriate community groups.
5. Mobilize and coordinate community, social, and educational services to students and families.
6. Develop and build community agency partnerships with service agencies to expand resources available to students and families.
7. Maintain records of all case referrals to social service agencies.
8. Perform other job-related duties as assigned.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Custodian

Reports to: Chief Operating Officer (Year 3)

Salary Range: $25,000

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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: High school diploma or GED.

Experience Required: No experience.

Certification Required: N/A

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 online 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	214,175	$29,120
Aldine ISD	101903	Houston	67,331	$25,154-$47,925

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed.

Position Title: Custodian

Reports to: Chief Operating Officer (Year 3)

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Perform general cleaning on campus.
2. Pick up trash on grounds and remove trash from the building and place in containers.
3. Set-up and break down cafeteria tables and set-up and break down equipment for school events.
4. Maintain inventory and replenish supplies.
5. Oversee the security of the school at the end of each work day.
6. Maintain a professional relationship with staff, teachers, students and parents.
7. Perform other job-related duties as assigned.
8.
9.
10.

GENERATION 26 SUPPLEMENTAL HR FORM

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed

Position Title: Office Clerk

Reports to: Office Manager (Year 2)

Salary Range: $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.

N/A

Proposed Location (City and County): Houston, Harris County

Number of Students anticipated in year one: 192 In year five: 756

Minimum Qualifications Required:

Education Required: High School Diploma or GED

Experience Required: At least two years experience in an office or school setting as an assistant

Certification Required: N/A

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 online 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	214,175	$29,120-$44,301
Aldine ISD	101903	Houston	67,331	$27,480-$51,070

Name of Proposed Charter School: Heritage Classical Academy

Name of Sponsoring Entity: Heritage Ed.

Position Title: Office Clerk

Reports to: Office Manager/Receptionist

RESPONSE BOXES WILL AUTO-EXPAND AFTER TEXT IS INSERTED

Job Duties: List up to 10 key duties this individual will perform.

1. Perform clerical support to one or more supervisors.
2. Compile and maintain departmental files, visitor logs, and students' records.
3. Assist in extra-curricular functions and activities.
4. Communicate and provide employees, students, parents and other individuals with important school information and events.
5. Prepare correspondence, forms, reports, etc.
6. Receive and direct incoming calls, take reliable messages, and route to appropriate staff.
7. Perform other clerical duties, as assigned.
8.
9.
10.

Attachment 24: Teacher Evaluation Tool(s)

(Attachment 24 is updated from Attachment 24 on pages 399-404 in the HCA GEN 25 charter application.)

Provide any teacher evaluation tool(s) that have been locally developed. If using a TEA-recommended tool such as the Texas Teacher Evaluation and Support System (T-TESS) please state so and link in the narrative response. DO NOT attach.

Heritage Classical Academy (HCA) Teacher Evaluation Form

(adapted from the Stronge Teacher Effectiveness Performance System, the BCSI Model Teacher Evaluation Form, Charlotte Danielson's Framework for Teaching Evaluation https://danielsongroup.org/downloads/2013-framework-teaching-evaluation-instrument: and, with permission, the Founders Classical Academy in Lewisville, TX Teacher Evaluation Form)

Teachers will be formally evaluated twice annually using these seven categories for evaluation and the following performance indicators and rubrics:

1. **Professionalism:** The teacher maintains a commitment to professional ethics, communicates effectively, serves as an effective role model, and fulfills responsibilities.
2. **Knowledge and Content and Pedagogy:** Demonstrates an understanding of the curriculum, subject content, and the developmental needs of all students by providing relevant learning experiences and participates in professional growth that enhances students learning.
3. **Instructional Planning:** The teacher plans using the state's standards, BCSI guidelines, the school's curriculum, effective strategies, resources, and data to meet the needs of all students and engages in vertical and horizontal planning with colleagues.
4. **Effective Teaching:** The teacher effectively engages students in learning by using a variety of instructional strategies in order to meet individual learning needs.
5. **Assessment of Learning:** The teacher systematically gathers, analyzes, and uses all relevant data to measure student academic progress, guide instructional content and delivery methods, develops targeted interventions based on data, develops assessments aligned with the curriculum, and provides timely feedback to students and parents throughout the school year.
6. **Classroom Environment and Management:** The teacher uses resources, routines, and procedures to provide an orderly, respectful, positive, safe, and engaging environment that is conducive to learning.
7. **Student Progress:** The work of the teacher results in measurable student academic progress for all student subgroups that meet the HCA goals.

Teachers will receive a score between 1 and 4, with 4 being Highly Effective for each performance indicator and an overall average, also between 1 and 4. This performance assessment is a companion to formal classroom observations which will take place twice a year. The two instruments together will inform the overall effectiveness of HCA teachers.

Indicators	Highly Effective (4)	Effective (3)	Partially Effective (2)	Ineffective (1)
1.Professionalism				
1.a. Demonstrates strong oral and written communication skills	**Always (100%)** speaks and writes correctly and eloquently without regard for the context or setting	**Regularly (>90%)** uses correct grammar, syntax, usage, and spelling in professional contexts	**Often (>80%)** uses correct grammar, syntax, usage, and spelling in professional contexts	**Frequently makes errors** in grammar, syntax, usage, or spelling in professional contexts
1.b. Displays a positive role model for students	**Always (100%)** Serves as a positive role model	**Regularly (>90%)** serves as a positive role model	**Often (>80%)** serves as a positive role model	**Rarely** serves as a positive role model

1.c. Fulfills all assigned duties punctually	**Always (100%)** fulfills assigned duties punctually	**Regularly (>90%)** fulfills assigned duties punctually	**Often (>80%)** fulfills assigned duties punctually	**Rarely** fulfills assigned duties punctually
1.d. Accepts, evaluates and acts upon feedback	**Always (100%)** actively seeks out feedback, criticism, suggestions, and always applies information	**Regularly (>95 %)** seeks out feedback, criticism, suggestions, and always applies information	**Often (>90%)** listens to directed feedback w/o being defensive and accepts and applies suggestions	**Rarely** accepts feedback w/o acting defensive and rarely applies criticism or suggestions
1.e. Works collaboratively with staff	Is regarded as a **highly effective** team member	Is regarded as a **very effective** team member	Is regarded as a **good** team member	Is not viewed as a team player
1.f. Exhibits a professional manner in both actions and dress.	**Always (100%)** presentable as a consummate professional	**Invariably (>95%)** acts and dresses in a professional manner	**Regularly (>90%)** acts and dresses in a professional manner	Often acts or dresses in an **unprofessional** manner
1.g. Displays sound judgment and respect in all aspects of the position.	**Invariably** ethical, honest, aboveboard, uses **impeccable** judgment, and remains respectful **(100%)**	**Invariably** ethical, honest, aboveboard, uses **impeccable** judgment, and remains respectful **(90%)**	Ethical, honest, uses **good** judgment, and acts respectful to parents & co-workers **(80%)**	Often uses **questionable** judgment, and is **disrespectful** to parents & co-workers
1.h. Develops a positive relationship with all school constituents	4.5 on school survey with school constituents re positive relationships	4.0 on school survey with constituents re positive relationships	4.0 on school survey with constituents re positive relationships	4.0 on school survey with constituents re positive relationships
2. Professional Knowledge and Skills				
2.a. Demonstrates knowledge and skills in assigned content area(s).	**Proven expertise** in all given subject matter and a **great** grasp on students' development and learning	Displays **strong knowledge** of subject matter and **strong** grasp of students' development and learning	**Knows** the subject matter **well** and has a **good grasp** of students' development and how they learn	Shown to have **little familiarity** with the subject matter and few ideas on how to teach it
2.b. Engages in professional development ("PD") activities, *e.g.*, conferences, online seminars, professional book studies.	Participated in **100%** of PD activities and is observed using new content knowledge or methods	Participated in **90%** of PD activities and is observed using new content knowledge or methods	Participated in **>80%** of PD activities and is observed using new content knowledge or methods	Did not participate in **any** PD over the course of the year
2.c. Participates in required training	**Always** in attendance for	**Regularly** in attendance for	**Often** in attendance for required	**Rarely** in attendance for

events, *e.g.*, Grade-Level, SPED, EL, Testing, or Brand-Specific trainings	required training events and fully engaged (***did not miss an event***)	required training events (***missed 1 event with approval***)	training events (***missed 2 events***)	required training events (***missed 3 or more events***)
3. Instructional Planning				
3.a. Demonstrates systematic planning to promote effective teaching	Excellent documented evidence of planning	Good documented evidence of planning	Fair documented evidence of planning	Poor documented evidence of planning
3.b. Plans for a variety of instructional and evaluation techniques	Excellent evidence of a variety of techniques	Good evidence of a variety of techniques	Fair evidence of a variety of techniques	Poor evidence of a variety of techniques
3.c. Attends vertical and horizontal planning periods with fellow teachers	Always attends and often leads planning time	Attends but does not participate constructively	Sometimes attends	Rarely attends
3.d. Provides detailed instruction for substitutes.	Always provides details for substitutes	Provides detail for substitutes but insufficient	Sometimes provides details for substitutes	Rarely provides details for substitutes
4. Effective Teaching				
4.a. Teaches virtues and ensures students understand the critical nature of virtuous living as responsible citizens in a free society.	**Always (100%)** implements character-based philosophy and teaching and exceeds training expectations w/o exception	**Regularly (>90%)** implements character-based philosophy and follows expectations	**Often (>80%)** implements character-based philosophy and follows expectations with **few reminders**	**Rarely** shown to implement character-based philosophy or to follow expectations
4.b. Uses appropriate instructional strategies: checks for understanding, guided practice, feedback, lesson closure.	Effective instructional strategies are evident in **100%** of lesson plans and classroom	Effective instructional strategies are evident in **>90%** of lesson plans and classroom visitations	Effective instructional strategies are evident in **>80%** of lesson plans and/or classroom visitations	Effective instructional strategies are evident in **<80%** of lesson plans and/or classroom visitations
4.c. Aligns instruction with daily goals, lessons, syllabus, and informs students of goals and objectives.	Class purpose is **always (100%)** evident during all classroom visitations and student interviews	Class purpose is **regularly (>90%)** evident during classroom visitations and student interviews	Class purpose is **often (>80%)** evident during classroom visitations and student interviews	Class purpose is **rarely** evident during classroom visitations and student interviews
4.d. Uses higher level thinking/questioning skills to elicit responses from students	**Always (100%)** uses high level thinking strategies	**Regularly (>90%)** uses higher order thinking strategies	**Often (>80%)** uses higher order thinking strategies	**Rarely** uses higher order thinking strategies

4.e. Teaches difficult material using instructional strategies.	**Always (100%)** develops **multiple** strategies to overcome students' misconceptions and confusion	**Regularly (>90%)** develops a strategy to overcome students' misconceptions and confusion	**Often (>80%)** develops a strategy to overcome students' misconceptions and confusion	Proceeds **without considering** mis-conceptions that students might have about the material
5. Assessment of Student Learning				
5.a. Uses formative assessments, *e.g.*, MAP benchmarks, practice tests, quizzes, *etc.*	**100%** of formative assessments given are filed in student documentation along with **detailed** feed back	**90%** of formative assessments given are filed in student documentation along with feedback	**>80%** of formative assessments given are filed in student documentation along with feedback	**<80%** of formative assessments given are filed in student documentation along with feedback
5.b. Uses student data from MAP, benchmarks, and school's tests to identify students in need of additional support	**Always (100%)** maintains a list of identified students, & ensures they receive targeted assistance	**Regularly (>90 %)** maintains a list of identified students, & ensures they receive targeted assistance	**Often (>80%)** updates a list of identified students, & ensures they receive targeted assistance	**Rarely** has a list of identified students, & rarely ensures they receive targeted assistance
6. Learning Environment and Classroom Management				
6.a. Consistently updates student files and accountability reports to monitor progress.	**Always (100%)** submits reports, such as progress reports and academic charts, by appropriate date	**Regularly (>95%)** submits reports, such as progress reports and academic charts, by appropriate date	**Often (>90%)** submits reports, such as progress reports and academic charts, by appropriate date	**Rarely** submits reports, such as progress reports and academic charts, by appropriate date
6.b. Communicates rules to students and implements classroom rules.	Students **always (100%)** follow rules during classroom visitations w/ **no** redirection by teacher	Students **regularly (>90%)** follow rules during classroom visitations w/ **no** redirection by teacher	Students **often (>80%)** follow rules during classroom visitations w/ **little** redirection by teacher	Students follow rules during classroom visitations **only after** redirection by teacher
6.c. Teacher maintains a clean and orderly classroom	Classroom is presentable and has all classroom requirements during **all (100%)** visitations	Classroom is presentable and has all classroom requirements during **most (>90%)** visitations	Classroom is presentable and has all classroom requirements during **most (>80%)** visitations	Classroom is presentable and has all classroom requirements during **some (<70%)** visitations

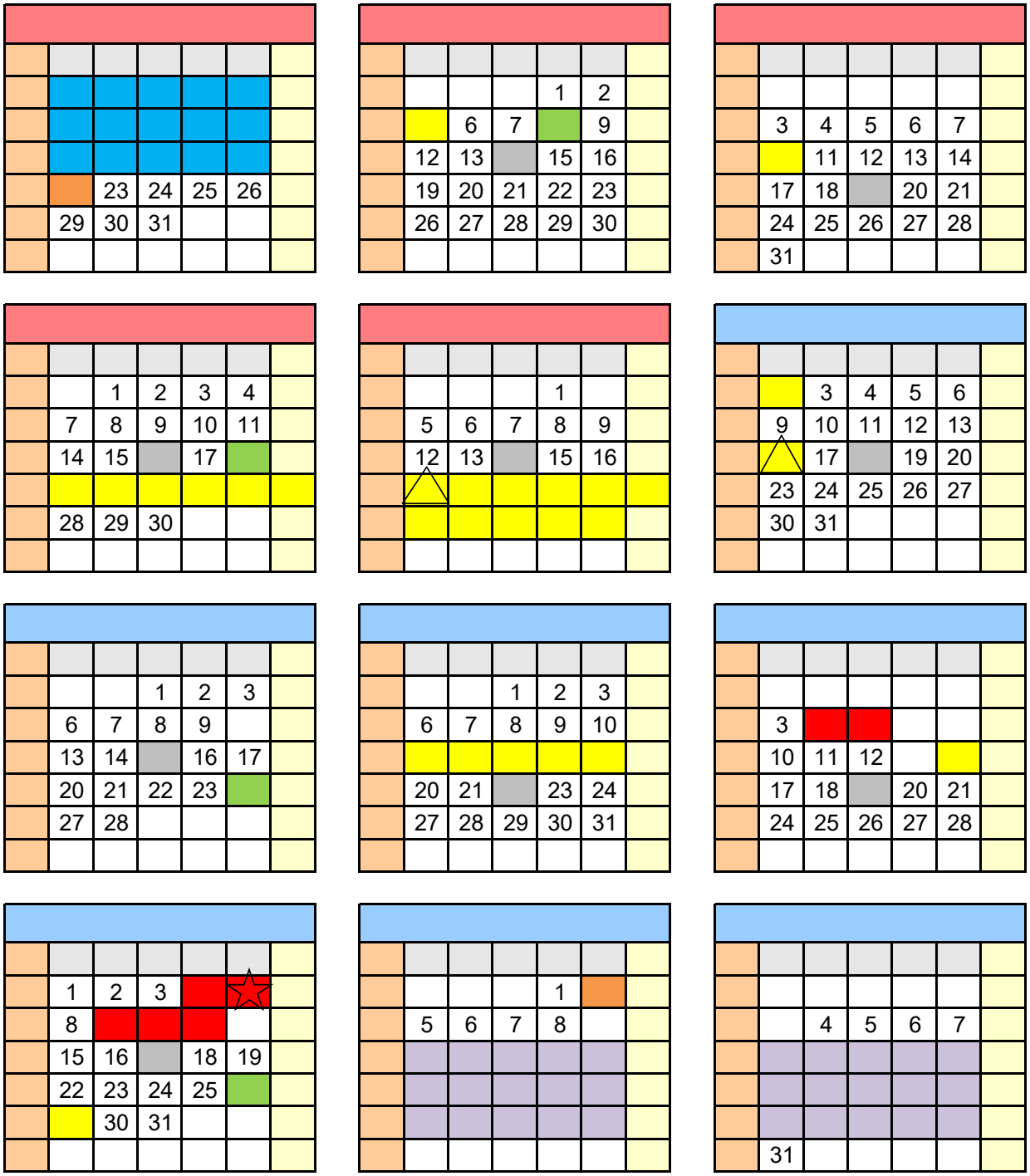
6.d. Reacts to student(s) behavior consistently and administers appropriate discipline.	Always **(100%)** responds to students appropriately	Regularly **(>90%)** responds to students appropriately	Often **(>85%)** responds to students appropriately	Rarely responds to students appropriately
6.e. Consistently follows attendance accounting procedures	Required attendance-taking procedures and reports completed **>95%** of the time	Required attendance-taking procedures and reports completed **>90%** of the time	Required attendance-taking procedures and reports completed **<90%** of the time	Required attendance-taking procedures less than **80%** of time
6.f. Represents HCA core virtues through relevant classroom displays and wall hangings.	HCA core virtues are **always (100%)** evident in classroom	HCA core virtues are **regularly (>90%)** evident in classroom	HCA core virtutes are **often (>80%)** evident in classroom	HCA Core Virtues are **rarely** evident in classroom
6.g. Administers grading period reports in a timely manner	**100%** of the time provides or mails necessary student progress reports to parents w/o a reminder	**90%** of the time provides or mails necessary student progress reports to parents w/o a reminder	**90%** of the time provides or mails necessary student progress reports to parents w/o a reminder	**<80%** of the time provides or mails necessary student progress reports to parents w/o a reminder
7. Student Progress				
Documented evidence of student progress for all groups.	To be developed when metrics are in place			

Attachment 25: Proposed School Calendar (Annual)

(Attachment 25 is updated from Attachment 25 on pages 405-406 in the HCA charter application.)

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.

2022-2023 School Calendar



LEGEND:					
	First/Last day of school		Holiday (No Teachers/No students)	☆	School celebration
	Staff development/no students		*Tentative* STAAR dates	△	Bad weather make up day
	Parent/Teacher meetings		Summer enrichment 1/2 days (PK-5 only)		Early dismissal

08/01-08/19: Teacher PD	12/14: Early dismissal	04/14: Good Friday
08/22: First Day of School	12/19: Bad weather day	04/19: Early dismissal
09/05: Labor Day	12/10-01/02: Winter Break	☆ 05/05: Cinco de Mayo
09/08: Meet the teacher	01/16: MLK Day (Bad weather day)	05/04-05/05,05/9-05/11: *STAAR*
09/14: Early dismissal	01/19: Early dismissal	05/17: Parent/Teacher conf
11/18: Parent/Teacher conf	02/15: Early dismissal	05/26: Parent/Teacher conf
10/10: Columbus Day	02/24: Parent/Teacher conf	05/29: Memorial Day
10/19: Early dismissal	03/13-03/17: Spring Break	06/02: Last Day of School
11/16: Early dismissal	03/22: Early dismissal	06/11-06/30: Summer Enrichment
11/21-11/25: Thanksgiving Break	04/04-04/05: *STAAR*	07/10-07/28: Summer Enrichment

Attachment 26: Proposed School Schedules

(Attachment 26 is updated from Attachment 26 on pages 407-409 in the HCA GEN 25 charter application.)

Provide a proposed school schedule for a sample day and a sample week.

	Monday/Wednesday A DAY				Tuesday/Thursday B DAY				Friday Rotating A/B Day	
TIME	**KA**	**KB**	**1A**	**1B**	**KA**	**KB**	**1A**	**1B**	**KA**	**1A**
7:45 AM	7:45 - 8:00 Arrival				7:45 - 8:00 Arrival				7:45 - 8:00 Arrival	
8:00 AM	8:00 - 8:15 Breakfast/Reading/Tutorial				8:00 - 8:15 Breakfast/Reading/Tutorial				8:00 - 8:15 Breakfast/Reading/Tutorial	
8:15 AM	8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting		8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting		8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting		8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting		8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting	
8:30 AM										
8:45 AM										
9:00 AM										
9:15 AM	9:15 - 9:35 Literacy (E.g. Handwriting)	9:15 - 9:35 Math: Number Talk	9:15 - 9:35 Literacy (E.g. Handwriting)	9:15 - 9:35 Math: Number Talk	9:15 - 9:35 Literacy (E.g. Handwriting)	9:15 - 9:35 Math: Number Talk	9:15 - 9:35 Literacy (E.g. Handwriting)	9:15 - 9:35 Math: Number Talk	9:15 - 9:35 Literacy (E.g. Handwriting)	9:15 - 9:35 Literacy (E.g. Handwriting)
9:30 AM										
9:45 AM	9:35 - 9:55 Math: Number Talk	9:35- 9:55 Literacy	9:35 - 9:55 Math: Number Talk	9:35- 9:55 Literacy	9:35 - 9:55 Math: Number Talk	9:35- 9:55 Literacy	9:35 - 9:55 Math: Number Talk	9:35- 9:55 Literacy	9:35 - 9:55 Math: Number Talk	9:35 - 9:55 Math: Number Talk
10:00 AM	9:55 - 10:25 Special: Music	9:55 - 10:25 Special: Art	9:55 - 10:25 Special: PE	9:-55 -10:25 Special: MFL	9:55 - 10:25 Special: Art	9:55 - 10:25 Special: Music	9:55 -10:25 Special: MFL	9:55 - 10:25 Special: PE	9:55 - 10:25 Special: Music	9:55 - 10:25 Special: PE
10:15 AM										
10:30 AM										
10:45 AM	10:25 - 11:25 Math Block		10:25 - 11:25 Math Block		10:25 - 11:25 Math Block		10:25 - 11:25 Math Block		10:25 - 11:25 Math Block	10:25 - 11:25 Math Block
11:00 AM										
11:15 AM										
11:30 AM	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science
11:45 AM										
12:00 PM	11:55 - 12:15 LUNCH	11:55 - 12:15 LUNCH	11:55 - 12:15 Literacy	11:55 - 12:15 Literacy	11:55 - 12:15 LUNCH	11:55 - 12:15 LUNCH	11:55 - 12:15 Literacy	11:55 - 12:15 Literacy	11:55 - 12:15 LUNCH	11:55 - 12:15 Literacy
12:15 PM	12:15 - 12:35 Recess	12:15 - 12:35 Recess	12:15 - 12:35 LUNCH	12:15 - 12:35 LUNCH	12:15 - 12:35 Recess	12:15 - 12:35 Recess	12:15 - 12:35 LUNCH	12:15 - 12:35 LUNCH	12:15 - 12:35 Recess	12:15 - 12:35 LUNCH
12:30 PM										
12:45 PM	12:35 - 1:05 Special: PE	12:35 - 1:05 Special: PE	12:35 - 12:55 Recess	12:35 - 12:55 Recess	12:35 - 1:05 Special: PE	12:35 - 1:05 Special: PE	12:35 - 12:55 Recess	12:35 - 12:55 Recess	12:35 - 1:05 Special: PE	12:35 - 12:55 Recess
1:00 PM			12:55 - 1:15 Math Facts	12:55 - 1:15 Math Facts			12:55 - 1:15 Math Facts	12:55 - 1:15 Math Facts		12:55 - 1:15 Math Facts
1:15 PM	1:05 - 1:25 Literacy	1:05 - 1:25 Literacy			1:05 - 1:25 Literacy	1:05 - 1:25 Literacy			1:05 - 1:25 Literacy	
1:30 PM	1:25 - 1:45 Math Facts	1:25 - 1:45 Math Facts	1:15 - 1:45 Special: PE	1:15 - 1:45 Special: PE	1:25 - 1:45 Math Facts	1:25 - 1:45 Math Facts	1:15 - 1:45 Special: PE	1:15 - 1:45 Special: PE	1:25 - 1:45 Math Facts	1:15 - 1:45 Special: PE
1:45 PM	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature
2:00 PM										
2:15 PM	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography
2:30 PM										
2:45 PM	2:45-3:15 Literacy (E.g. Reading Practice)		2:45-3:15 Literacy (E.g. Reading Practice)		2:45-3:15 Literacy (E.g. Reading Practice)		2:45-3:15 Literacy (E.g. Reading Practice)		2:45-3:15 Literacy (E.g. Reading Practice)	
3:00 PM										
3:15 PM	3:15 - 3:30 Class Forum				3:15 - 3:30 Class Forum				3:15 - 3:30 Class Forum	

TIME	Monday/Wednesday A DAY		Tuesday/Thursday B DAY		Rotating A/B Day
	1A	1B	1A	1B	1A
7:45 AM	7:45 8:00 PREP		7:45 - 8:00 PREP		7:45 - 8:00 ARRIVAL DUTY
8:00 AM	8:00 - 8:15 Breakfast		8:00 - 8:15 Breakfast		8:00 - 8:15 Breakfast
8:15 AM 8:30 AM 8:45 AM 9:00 AM	8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting		8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting		8:15 - 9:15 Literacy: Vocabulary Spelling Handwriting
9:15 AM 9:30 AM	9:15 - 9:35 Literacy (E.g. Handwriting)	9:15 - 9:35 Math: Number Talk	9:15 - 9:35 Literacy (E.g. Handwriting)	9:15 - 9:35 Math: Number Talk	9:15 - 9:35 Literacy (E.g. Handwriting)
9:45 AM	9:35 - 9:55 Math: Number Talk	9:35- 9:55 Literacy	9:35 - 9:55 Math: Number Talk	9:35- 9:55 Literacy	9:35 - 9:55 Math: Number Talk
10:00 AM 10:15 AM 10:30 AM	9:55 10:25 PLANNING	9:55 10:25 PLANNING	9:55 10:25 PLANNING	9:55 10:25 PLANNING	9:55 10:25 PLANNING/ DATA MTGs
10:45 AM 11:00 AM 11:15 AM	10:25 - 11:25 Math Block		10:25 - 11:25 Math Block		10:25 - 11:25 Math Block
11:30 AM 11:45 AM	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science	11:25 - 11:55 Science
12:00 PM	11:55 - 12:15 Literacy	11:55 - 12:15 Literacy	11:55 - 12:15 Literacy	11:55 - 12:15 Literacy	11:55 - 12:15 Literacy
12:15 PM 12:30 PM	12:15 - 12:35 LUNCH DUTY	12:15 - 12:35 LUNCH DUTY	1:15 - 1:45 PLANNING	12:15 - 12:35 LUNCH	12:15 - 12:35 LUNCH DUTY
12:45 PM	12:35 - 12:55 Recess	12:35 - 12:55 Recess	12:35 - 12:55 Recess	12:35 - 12:55 Recess	12:35 - 12:55 Recess
1:00 PM 1:15 PM	12:55 - 1:15 Math Facts	12:55 - 1:15 Math Facts	12:55 - 1:15 Math Facts	12:55 - 1:15 Math Facts	12:55 - 1:15 Math Facts
1:30 PM	1:15 - 1:45 PLANNING		1:15 - 1:45 PLANNING		1:15 - 1:45 PLANNING
1:45 PM 2:00 PM	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature	1:45 - 2:15 ELA: Literature
2:15 PM 2:30 PM	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography	2:15 - 2:45 History/ Geography
2:45 PM 3:00 PM	2:45-3:15 Literacy (E.g. Reading Practice)		2:45-3:15 Literacy (E.g. Reading Practice)		2:45-3:15 Literacy (E.g. Reading Practice)
3:15 PM	3:15 -3:30 Virtues		3:15 -3:30 Virtues		3:15 -3:30 Virtues
3:30 PM 3:45 PM	3:30 4:00 CARPOOL/DISMISSAL DUTY		3:30 4:00 CARPOOL/DISMISSAL DUTY		3:30 4:00 CP/DISMISSAL DUTY
4:00 PM 4:15 PM					

Monday/Wednesday A DAY							
TIME	Music 1	Music 2	Art 1	Art 2	PE	MFL	Latin
7:45 AM	7:45 - 8:10 Arrival						
8:00 AM							
8:15 AM	8:10 - 9:00 Planning	8:10 - 8:50 6A	8:10 - 9:50 Planning	8:10 - 8:50 6B	8:10 - 8:50 5A	8:10 - 8:50 5B	8:10 - 9:05 Planning
8:30 AM							
8:45 AM							
9:00 AM	9:00 - 9:50 8A	8:50 - 9:20 Planning		8:50 - 9:20 Planning	8:50 - 9:20 Planning	8:50 - 9:20 Planning	7A
9:15 AM							
9:30 AM		9:20 - 9:50 3A		9:20 - 9:50 3B	9:20 - 9:50 2A	9:20 - 9:50 2B	
9:45 AM							
10:00 AM	9:50 - 10:50 Planning	9:50 - 10:20 KA	9:50 - 10:50 8B	9:50 - 10:20 KB	9:50 - 10:20 1A	9:50 - 10:20 1B	10:00 - 10:50 7B
10:30 AM		10:20 - 11:40 Planning		10:20 - 10:50 Planning	10:20 - 11:10 Planning	10:20 - 11:10 Planning	
10:45 AM	Prep		Prep	10:50 - 11:40 7B			10:55 - 11:458A
11:00 AM	11:00 - 11:40 4A		11:00 - 11:40 4B				
11:15 AM					11:10 - 11:40 3A	11:10 - 11:40 3B	
11:30 AM							
11:45 AM	Prep	11:40 - 12:20 Lunch/ Planning	Prep	11:40 - 1:30 LUNCH/ Planning	Prep	Prep	11:45 - 12:20 LUNCH
12:00 PM	11:50 - 12:30 5A		11:50 - 12:30 5B		11:50 - 12:30 4A	11:50 - 12:30 4B	12:20 - 1:10 8B
12:15 PM		12:20 - 1:10 7A					
12:30 PM	12:30 - 12:50 LUNCH		12:30 - 12:50 LUNCH		12:30 - 12:50 LUNCH	12:30 - 12:50 LUNCH	
12:45 PM							
1:00 PM	12:50 - 1:20 2A		12:50 - 1:20 2B		12:50 - 1:20 KB	12:50 - 1:20 KA	1:10 - 1:30 Prep
1:15 PM		1:10 - 2:10 Planning					
1:20 PM	Prep		1:20 - 2:10 Planning	Prep	Prep	1:20 - 2:10 Planning	
1:30 PM	1:30 2:00 1A			1:30 - 2:00 1B	1:30 - 2:10 6A		1:30 - 2:10 6B
1:45 PM							
2:00 PM	Prep			Prep			
2:15 PM	2:10 - 3:00 Band	2:10 - 3:00 Choir	2:10 - 3:00 Art Elective	2:10 - 3:00 Art Elective/Study Hall	2:10 - 3:00 Elective/Study Hall	2:10 - 3:00 Elective/Study Hall	2:10 - 3:00 Planning
2:30 PM							
2:45 PM							
3:00 PM							
3:15 PM							

Tuesday/Thursday B DAY						
Music 1	Music 2	Art 1	Art 2	PE	MFL	Latin
7:45 - 8:10 Arrival						
8:10 - 9:50 Planning	8:10 - 8:50 6B	8:10 - 9:00 Planning	8:10 - 8:50 6A	8:10 - 8:50 5B	8:10 - 8:50 5A	8:10 - 9:05 Planning
	8:50 - 9:20 Planning	9:00 - 9:50 8A	8:50 - 9:20 Planning	8:50 - 9:20 Planning	8:50 - 9:20 Planning	9:05 - 9:55 7A
	9:20 - 9:50 3B		9:20 - 9:50 3A	9:20 - 9:50 2B	9:20 - 9:50 2A	
9:50 - 10:50 8B	9:50 - 10:20 KB	9:50 - 11:00 Planning	9:50 - 10:20 KA	9:50 - 10:20 1A	9:50 - 10:20 1B	10:00 - 10:50 7B
	10:20 - 10:50 Planning		10:20 - 12:20 LUNCH/Planning	10:20 - 11:10 Planning	10:20 - 11:10 Planning	
Prep	10:50 - 11:40 7B					10:55 - 11:45 8A
11:00 - 11:40 4B		11:00 - 11:40 4A		11:10 - 11:40 3B	11:10 - 11:40 3A	
Prep	11:40 - 1:30 Lunch/ Planning	Prep		Prep	Prep	11:45 - 12:20 LUNCH
11:50 - 12:30 5B		11:50 - 12:30 5A	12:20 - 1:10 7A	11:50 - 12:30 4B	11:50 - 12:30 4A	
12:30 - 12:50 LUNCH		12:30 - 12:50 LUNCH		12:30 - 12:50 LUNCH	12:30 - 12:50 LUNCH	12:20 - 1:10 8B
12:50 - 1:20 2B		12:50 - 1:20 2A		12:50 - 1:20 KB	12:50 - 1:20 KA	
Prep		Prep	1:10 - 2:10 Planning	Prep		1:10 - 1:30 Prep
1:30 2:10 Planning	1:30 - 2:00 1B	1:30 - 2:00 1A		1:30 - 2:10 6B	1:20 - 2:10 Planning	1:30 - 2:10 6A
	Prep					
2:10 - 3:00 Band	2:10 - 3:00 Choir	2:10 - 3:00 Art Elective	2:10 - 3:00 Art Elective/Study Hall	2:10 - 3:00 Elective/Study Hall	2:10 - 3:00 Elective/Study Hall	2:10 - 3:00 Planning

Attachment 27: Proposed Admissions and Enrollment Policy

(Attachment 27 is updated from Attachment 27 on pages 410-412 in the HCA GEN 25 charter application.) 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.

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.

HERITAGE
CLASSICAL ACADEMY

Admissions Policy

Given a desire to serve all students equitably, admission to Heritage Classical Academy shall be open to all students who reside in the geographic boundaries as outlined in the open-enrollment state charter and who are eligible according to state laws and regulations. The school's nondiscrimination policy applies to its admission policy and is stated as: ***The board commits itself to the policy that there shall be no unlawful discrimination against any person because of race, color, religion, age, sex, gender identification, national origin or disability.***

Application Timeline:

HCA's application period in Year One will commence on November 1, 2021 and end on April 1, 2022 as aligned to Texas Education Code 12117. If capacity has not been reached, enrollment will continue on a rolling basis. If enrollment exceeds available space, we will conduct a lottery one week after the application deadline.

The lottery will be held randomly for all students applying with the following students receiving exemptions:

1) Returning students

2) Siblings of returning students

3) Children of school's staff

We will ensure that the total number of students exempt includes only a small percentage of total enrollment.

Admission Eligibility

According to Texas Education Code 25.001 (b), an eligible applicant must reside within the geographic boundaries of HCA that include Houston ISD, Spring Branch ISD and Aldine ISD. Secondary geographic boundaries included are Cypress-Fairbanks ISD, Klein ISD and Spring ISD.

As authorized by Texas Education Code 12.111 (5)(A), HCA reserves the right to exclude from admission students with a documented history of criminal offense, a juvenile court adjudication, or discipline problems under Texas Education Code Subchapter A, Chapter 37. 12.111(5)(A).

Student eligible for Kindergarten must be five (5) years of age prior to September 1 of the year they seek to enroll.

Application Submission and Deadlines

Applicants must submit the common admission application form as stated by Texas Education Code 12.1773. The form, linked to this website (https://tea.texas.gov/sites/default/files/Charter%20Student%20Admission%20Application%202020-2021.pdf) requires the following elements:

- Student Name
- Gender
- Date of Birth
- Grade Applying For
- Social Security Number/Student Identification Number
- Parent or Guardian Name
- Address
- Contact Information (phone/email)
- Name of any siblings attending the school
- Staff/board member relationship
- Certification that the information is correct, and signer is the legal guardian

Only after the school's lottery has occurred and the enrollment process begins will HCA request additional information to include health records, academic records, verification of address and if needed, discipline records. Exclusion of students will ONLY occur if students have SEVERE discipline problems, as specified in Subchapter A, Chapter 37. HCA will work with all families that want to accept their seat to receive the intent to enroll form and additional documentation.

Waitlist Policy

HCA will maintain an active waitlist if the school is oversubscribed and a lottery occurs. As positions become available, students will be offered positions from the waiting list based on the lottery results. If families chose to apply after the admission window ends on April 1, 2022 and the school is oversubscribed, they will be placed on the waiting list in the order the application was received. HCA will share all waitlist data by grade level with the Texas Education Agency, no later than the last Friday in October of each year.

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.

N/A

Attachment 30: Detailed Start-up Plan

(Attachment 30 has been updated from Attachment 30, pages 415-418 in the HCA GEN 25 charter application.)

Provide a detailed start-up plan for Year 0 (August 2021-August 2022).

HERITAGE CLASSICAL ACADEMY START-UP PLAN
September 2021-August 2022

Summary of Critical Milestones in Start-up Year

- Final funding plan for Start-up Year submitted and approved by BCSI by September 1, 2021
- CEO/Superintendent starts full-time employment by September 1, 2021
- Marketing/enrollment plan submitted and approved by BCSI by September 1, 2021
- School location under contract by January 15, 2022
- Enrollment at 50% capacity by March 1, 2022
- CFO and Lower School Principal hired by April 1, 2022
- CEO/Superintendent attends BCSI Training for leaders April 1, 2022
- Governing board solidified; all attend Hillsdale Board Training by April 30, 2022
- 50% of teachers hired by April 1, 2022; will start August 2022
- Enrollment at 75% capacity by May 1, 2022
- Office Manager/Receptionist and PEIMS Manager hired by May 1, 2022
- Part-time staff/teacher specialists hired by June 1, 2022
- Curriculum order placed May 15, 2022
- Final draft of family/student and employee handbooks, schedule, curriculum submitted to BCSI for approval by May 16, 2022
- 100% of teachers hired June 1, 2022
- Part-time staff/teacher specialists hired by June 1, 2022
- Board ½ day retreat by June 30, 2022
- Professional Development begins August 1, 2022
- School opens August 22, 2021

DETAILED TASKS/GOALS	***Person Responsible***	***Support***	***DUE DATE***
GOVERNANCE ▪ **Open Board Meetings once a month** ▪ **Add Board Members as Needed** ▪ **Create Board Committees as needed: Ad Hoc Marketing Committee** ▪ **Add to Advisory Board** ▪ **Complete Board Training at Hillsdale** ▪ **Approve Student/Family Handbook and Staff Handbook** ▪ **Board Retreat (at least ½ day)** ▪ **Keep record of all minutes** ▪ **Create needed policies for the school**	**Stuart Saunders and Board of Directors**	**BCSI**	**Ongoing** **12/30/2021** **10/15/2021** **4/30/2022** **4/30/2022** **5/16/2022** **6/30/2022** **Ongoing** **7/1/2021**
STAFFING AND PD ▪ **Hire Outstanding Teachers (over 50% w/MA; 2 bilingual; avg. 5 yrs. teaching experience)** ▪ **Hire Special Education Coordinator** ▪ **Hire CFO; ½ time Enrollment Director**	**CEO/ Superintendent**	**Board members can interview; But CEO makes decisions**	**50% by 4/1/2022' 100% by 6/1/2022** **6/1/2022** **5/1/2022**

(start February 1) ▪ **Hire Office Manager/Receptionist and part-time IT Director** ▪ **Hire counselor and ½ time social worker** ▪ **Hire PEIMS Manager** ▪ **Training for PEIMS Manager** ▪ **Hire custodian** ▪ **3-weeks PD for Teachers from BCSI, CLI, Neuhaus, and APQC (contracts in place for all PD providers)**			 **5/1/2022** **5/1/2022** **5/1/2022** **6/1/2022** **8/15/2022** **6/1/2022** **8/1-8/17, 2022**
STUDENT ENROLLMENT ▪ **Develop marketing/PR plan** ▪ **Develop all enrollment forms** ▪ **Develop new engaging video** ▪ **Update website post charter approval** ▪ **Post HCA with Apply Houston** ▪ **Develop student database** ▪ **Place ads in local publications** ▪ **Execute marketing plan including open houses, small home meetings, speaking engagements, etc.** ▪ **Hold Lottery if Needed** ▪ **Enroll 192 Students (target: 76% FRL and 10% SPED)** ▪ **Home visit each new student**	**CEO/ Superintendent**	**Board Marketing Committee**	 **9/1/2021** **10/1/2021** **10/15/2021** **9/15/2021** **11/1/2021** **11/1/2021** **Ongoing** **Ongoing** **4/1/2022** **8/1/2022** **8/17/2022**
CORE CURRICULUM AND PROGRAMS ▪ **Review any revisions to curriculum recommended by TEA in charter review process** ▪ **Finalize Discipline Policy** ▪ **Finalize scope and sequence for K-1 in all subjects** ▪ **Order curriculum materials** ▪ **Organize curriculum materials in new space and classrooms**	**CEO/ Superintendent and instructional staff as hired**	**Board Committee BCSI Children's Learning Institute**	 **10/1/2021** **3/1/2022** **4/1/2022** **5/1/2022** **8/17/22**
AUXILIARY PROGRAMS ▪ **Select and contract with Transportation Vendor; or purchase van and hire driver** ▪ **Select and contract with Food Service Vendor** ▪ **Select and contract with custodial service for evening cleaning** ▪ **Select and contract with security service**	**CEO/ Superintendent**	**Chief Financial Officer when hired**	 **6/1/2022** **6/1/2022** **6/1/2022** **6/1/2022**

▪ **Finalize contract with YMCA for After School Programs**			**6/1/2022**
FACILITIES AND FFE ▪ **Sign contracts for selected facility** ▪ **Select contractor for renovations** ▪ **Issue contract for renovations** ▪ **Post HCA school sign at site and remodeling plans online** ▪ **Begin remodeling** ▪ **Review plans/specify any changes** ▪ **Place change orders** ▪ **Order furniture and equipment** ▪ **Install needed security at school** ▪ **Renovations completed** ▪ **Inspections passed** ▪ **Ribbon Cutting Ceremony**	**Board of Directors**	**Finance Committee** **CEO/ Superintendent**	 **10/1/2021** **10/15/2021** **11/1/2021** **11/15/2021** **12/15/2021** **2/1/2022** **2/1/2022** **41/2022** **5/1/2022** **6/1/2022** **6/10/2022** **6/15/2022**
FINANCES ▪ **Finalize start-up budget** ▪ **Start-up cash flow ensured** ▪ **Finalize 3-year operating budget** ▪ **Develop Strategic Business Plan** ▪ **Finance Policies Manual Developed** ▪ **Install accounting software and load financial into the system** ▪ **PEIMS Data System in place** ▪ **Contract with Auditor**	**Board Finance Committee** **CEO/ Superintendent**	**CFO**	 **10/1/2021** **10/1/2021** **12/1/2021** **2/15/2022** **5/1/2022** **5/1/2022** **6/15/2022** **7/1/2022**
FINALIZE SYSTEMS ▪ **Finalize School Calendar** ▪ **Finalize Daily schedule** ▪ **Dress code/uniforms** ▪ **Management Information System (integrated data system)** ▪ **Student Handbook** ▪ **Faculty Handbook** ▪ **Home/School Communication Plan** ▪ **Arrival and Dismissal Plans**	**CEO/ Superintendent**	**Instruction-al staff prior to start of school**	 **10/1/2021** **10/15/2021** **11/1/2021** **5/1/2022** **5/30/2022** **6/30/2022** **7/1/2022** **8/10/2022**
DEVELOPMENT ▪ **Secure TEA start-up grant** ▪ **Apply for Walton start-up grant if available** ▪ **Secure additional grants from Houston Foundations, such as Brown Foundation and National Foundations interested in classical education**	**Board Development Committee** **CEO/ Superintendent**	**Board Members**	 **10/30/2021** **3/1/2022** **6/1/2022**

Attachment 31: Financial Plan Workbook

(The Financial Workbook has been updated from the HCA GEN 25 Financial Workbook and put in the GEN 26 template with revisions.)

Using the template provided on the New Operator 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 $6,424 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 award of a successful competitive charter application, and the continuation of funds from the United States Department of Education. **Pending applicant eligibility and availability of federal funds, the application provides for up to $900,000 in federal CSP funding.** The applicant must include and budget with these funds when completing the Financial Workbook. In the notes section of each tab, please designate the allowable use of CSP funds in the appropriate row.

If awarded, funds 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 has been 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.

1/18/2021 23:40

Proposed Charter School Name

FINANCIAL PLAN WORKBOOK SUMMARY

	2021	2022	2023	2024	2025	2026
REVENUE						
		$ 1,845,033	$ 2,767,549	$ 4,123,648	$ 5,484,452	$ 6,471,654
Charter School Program (CSP) Start-Up Grant	$ 300,000	$ 300,000	$ 174,999	$ -	$ -	$ -
Other Federal Revenues	$ -	$ 201,350	$ 302,025	$ 450,017	$ 598,523	$ 706,257
Total Federal Revenues	$ 300,000	$ 501,350	$ 477,024	$ 450,017	$ 598,523	$ 706,257
Total Local and Other Revenue	$ 315,000	$ 265,000	$ 106,000	$ 210,569	$ 126,341	$ -
TOTAL REVENUE	**$ 615,000**	**$ 2,611,383**	**$ 3,350,573**	**$ 4,784,235**	**$ 6,209,317**	**$ 7,177,911**
EXPENSES						
PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES						
Total Administrative Staff Personnel Costs	$ 192,575	$ 691,250	$ 751,250	$ 890,000	$ 1,130,000	$ 1,242,500
Total Instructional Personnel Costs	$ 47,578	$ 631,000	$ 1,004,000	$ 1,632,250	$ 2,201,000	$ 2,574,000
Total Non-Instructional Personnel Costs	$ 1,975	$ 52,500	$ 80,000	$ 105,000	$ 105,000	$ 105,000
Total Payroll Taxes and Benefits	$ 45,593	$ 276,050	$ 373,106	$ 534,120	$ 698,539	$ 797,241
TOTAL PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES	**$ 287,720**	**$ 1,650,800**	**$ 2,208,356**	**$ 3,161,370**	**$ 4,134,539**	**$ 4,718,741**
NON-PAYROLL RELATED EXPENSES						
Total Contracted Services	$ 4,415	$ 212,625	$ 320,863	$ 473,578	$ 625,892	$ 741,065
Total School Operations	$ 101,500	$ 227,100	$ 302,050	$ 417,606	$ 526,094	$ 628,399
Total Facilities Operations and Maintenance	$ 201,267	$ 371,700	$ 399,740	$ 578,266	$ 743,626	$ 866,784
Reserves / Contingencies	$ 12,000	$ 50,000	$ 70,000	$ 105,000	$ 136,500	$ 163,800
TOTAL NON-PAYROLL RELATED EXPENSES	**$ 319,182**	**$ 861,425**	**$ 1,092,653**	**$ 1,574,450**	**$ 2,032,112**	**$ 2,400,048**
TOTAL EXPENSES	**$ 606,902**	**$ 2,512,225**	**$ 3,301,009**	**$ 4,735,820**	**$ 6,166,650**	**$ 7,118,789**
NET OPERATING INCOME (before depreciation)	**$ 8,098**	**$ 99,158**	**$ 49,564**	**$ 48,415**	**$ 42,666**	**$ 59,122**
STUDENT ENROLLMENT						

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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 WHITE 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 it's 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 WHITE 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 WHITE 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 WHITE 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 transporation allotments for the specified programs.

Personnel Tab

- **Enter information into the WHITE 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. **Notes must include the portion of the salary amount that will be paid from the CSP grant funds.**

- 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 WHITE 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 WHITE 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. ****Notes must include the amounts that will be paid from CSP grant funds.**

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.

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Heritage Classical Academy

NEW CHARTER SCHOOL APPLICATION FINANCIAL PLAN WORKBOOK

Lead Applicant Name:	Stuart Saunders	
Contact Email:	sdsaunders@missionheights.net	
Contact Phone:	713-906-8700	
Start-Up (Year 0) Fiscal Year End:	2021	*Enter the 4-digit year (XXXX)*
Year One Fiscal Year End:	2022	*Enter the 4-digit year (XXXX)*
Fiscal Year End Date:	June 30	*Select date*
Total School Year Minutes:	80,100	*Enter the number of minutes (e.g., 75,600)*

ENTER PROPOSED SCHOOL NAME



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Heritage Classical Academy

ESTIMATE OF STATE AID ENTITLEMENT INPUT

General Instructions and Notes

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)**			44.00	88.00	88.00
Kindergarten	96.00	96.00	96.00	96.00	96.00
1st Grade	96.00	96.00	96.00	96.00	96.00
2nd Grade		96.00	96.00	96.00	96.00
3rd Grade			96.00	96.00	96.00
4th Grade				96.00	96.00
5th Grade					100.00
6th Grade					
7th Grade					
8th Grade					
9th Grade					
10th Grade					
11th Grade					
12th Grade					
Total Number of All Students Enrolled (Average Membership)	**192.00**	**288.00**	**428.00**	**568.00**	**668.00**
Average Daily Attendance (ADA) %	**95%**	**95%**	**95%**	**95%**	**95%**
Average Daily Attendance (ADA)	**182.40**	**273.60**	**406.60**	**539.60**	**634.60**
Percent change YOY		50%	49%	33%	18%

STUDENT POPULATION

Data for the following fiscal years must be based on reasonable estimates and projections.

Special Education Data:	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	10.00		15.00	-	22.00	-	29.00	-	34.00	-
Number Enrolled in Resource Room			-	-	-	-	-	-	-	-
Number Enrolled in Self-Contained Mild/Mod/Sev			-	-	-	-	-	-	-	-
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	10.00		15.00	-	22.00	-	29.00	-	34.00	-
Special Education Student Count (SPED)	**20.00**	**-**	**30.00**	**-**	**44.00**	**-**	**58.00**	**-**	**68.00**	**-**
Special Education Student Count %	**10.42%**		**10.42%**		**10.28%**		**10.21%**		**10.18%**	
Percent change YOY			50%	0%	47%	0%	32%	0%	17%	0%

Career and Technology (C&T) Data:	2022	Advanced C&T FTE, P-TECH, New Tech Network 2022	2023	Advanced C&T FTE, P-TECH, New Tech Network 2023	2024	Advanced C&T FTE, P-TECH, New Tech Network 2024	2025	Advanced C&T FTE, P-TECH, New Tech Network 2025	2026	Advanced C&T FTE, P-TECH, New Tech Network 2026
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										
Career & Technology Students Enrolled	-	-	-	-	-	-	-	-	-	-
% of Career & Technology Students										
Percent change YOY			0%	0%	0%	0%	0%	0%	0%	0%

Dyslexia, Pregnancy Related, & Bilingual/ESL Data:	Data for the following fiscal years must be based on reasonable estimates and projections.				
	2022	2023	2024	2025	2026
Number Dyslexia Students Enrolled	8.00	12.00	19.00	25.00	31.00
% of Dyslexia Students Enrolled	**4.17%**	**4.17%**	**4.44%**	**4.40%**	**4.64%**
Number of Pregnancy Related Students					
% of Pregnancy Related Students Enrolled					
Number of Students Enrolled in Bilingual LEP	70.00	105.00	155.00	206.00	242.00
Number of Students Enrolled in Bilingual LEP Dual Language One-way/Two-way					
Number of Students Enrolled in Bilingual Non LEP Dual Language One-way/Two-way					
Total Number of Students Enrolled in Bilingual LEP/Non LEP	70.00	105.00	155.00	206.00	242.00
% of Students Enrolled in Bilingual LEP	**36%**	**36.46%**	**36.21%**	**36.27%**	**36.23%**

Special Education Error Check					
Career and Technology Error Check					

Compensatory Education Enrollment	144.00	216.00	321.00	426.00	501.00

TRANSPORTATION	2022	2023	2024	2025	2026
Regular Program Transportation Allotment		-	-	-	-
Special Education Program Transportation Allotment		-	-	-	-
Career and Technology Program Transportation Allotment		-	-	-	-
Transportation Total	-	-	-	-	-
Percent change YOY		0%	0%	0%	0%

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Heritage Classical Academy

PERSONNEL

Position Description	Position Category (Categories align with the categories on the Five Year Budget)	Year Count	Number of FTEs Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Notes	Total of Salaries Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
		FYE	2021	2022	2023	2024	2025	2026							
		Starting Salary	# of FTEs	# of FTEs	# of FTEs	# of FTEs	# of FTEs	# of FTEs							
											Yearly Raise %				
										0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%
Homeroom/General Subject Teacher	Teachers - Regular	$ 57,500	0.5	6.0	9.0	15.0	20.0	23.0	Not enterting in yearly raise %	$ 27,255	$ 345,000	$ 517,500	$ 862,500	$ 1,150,000	$ 1,322,500
Specialist Teacher	Specialty Teachers	$ 57,500	0.1	1.5	3.0	4.5	6.0	8.0	Teachers for co-curricular	$ 6,814	$ 86,250	$ 172,500	$ 258,750	$ 345,000	$ 460,000
Teacher Aide	Aides	$ 26,000	0.2	2.0	3.0	6.0	9.0	10.0	1 aide for every PK classroom. 2	$ 4,108	$ 52,000	$ 78,000	$ 156,000	$ 234,000	$ 260,000
Special Education Teacher	Teachers - SPED	$ 57,500	0.0	0.5	1.0	1.0	2.0	2.0	.5 teacher in year 1 for 20	$ -	$ 28,750	$ 57,500	$ 57,500	$ 115,000	$ 115,000
Special Education Coordinator (Teacher	Deans, Directors & Coordinators	$ 67,500	0.1	1.0	1.0	1.0	1.0	1.0	Can help serve students in	$ 5,333	$ 67,500	$ 67,500	$ 67,500	$ 67,500	$ 67,500
Counselor	Deans, Directors & Coordinators	$ 57,500	0.0	1.0	1.0	1.0	1.0	1.0		$ -	$ 57,500	$ 57,500	$ 57,500	$ 57,500	$ 57,500
Social Worker	Deans, Directors & Coordinators	$ 57,500	0.0	0.5	0.5	1.0	1.0	1.0		$ -	$ 28,750	$ 28,750	$ 57,500	$ 57,500	$ 57,500
EL Specialist	Deans, Directors & Coordinators	$ 60,000	0.1	1.0	1.0	1.0	1.0	1.0	Ensures testing and services	$ 4,740	$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000
Custodian	Custodian	$ 25,000	0.1	1.0	1.0	2.0	2.0	2.0		$ 1,975	$ 25,000	$ 25,000	$ 50,000	$ 50,000	$ 50,000
Office Manager	Administrative Staff	$ 47,500	0.1	1.0	1.0	1.0	1.0	1.0		$ 3,753	$ 47,500	$ 47,500	$ 47,500	$ 47,500	$ 47,500
Office Clerk	Administrative Staff	$ 30,000	0.0	0.0	1.0	1.0	1.5	3.0		$ -	$ -	$ 30,000	$ 30,000	$ 45,000	$ 90,000
Principal	Instructional Management	$ 82,500	0.2	1.0	1.0	1.0	1.0	1.0		$ 13,750	$ 82,500	$ 82,500	$ 82,500	$ 82,500	$ 82,500
Assistant Principal	Instructional Management	$ 67,500	0.0	0.0	0.0	1.0	1.0	2.0	1 AP for Elementary in year 3 - 1	$ -	$ -	$ -	$ 67,500	$ 67,500	$ 135,000
CEO/Superintendent	Executive Management	$ 130,000	0.9	1.0	1.0	1.0	1.0	1.0		$ 113,750	$ 130,000	$ 130,000	$ 130,000	$ 130,000	$ 130,000
Chief Academic Officer	Executive Management	$ 90,000	0.0	0.0	0.0	0.0	1.0	1.0		$ -	$ -	$ -	$ -	$ 90,000	$ 90,000
Director of Enrollment/Community	Deans, Directors & Coordinators	$ 60,000	0.5	0.5	1.0	1.0	1.0	1.0	Assists with student	$ 30,000	$ 30,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000
Chief Operating Officer	Operation / Business Manager	$ 85,000	0.0	0.0	0.0	0.5	1.0	1.0		$ -	$ -	$ -	$ 42,500	$ 85,000	$ 85,000
Chief Financial Officer	CFO / Director of Finance	$ 100,000	0.2	1.0	1.0	1.0	1.0	1.0		$ 16,667	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 100,000
IT Director	Deans, Directors & Coordinators	$ 65,000	0.0	0.5	0.5	0.5	1.0	1.0	if more than half time is needed	$ -	$ 32,500	$ 32,500	$ 32,500	$ 65,000	$ 65,000
PEIMS Manager	Deans, Directors & Coordinators	$ 55,000	0.1	1.0	1.0	1.0	1.0	1.0		$ 4,583	$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
Nurse	Nurse	$ 55,000	0.0	0.5	1.0	1.0	1.0	1.0		$ -	$ 27,500	$ 55,000	$ 55,000	$ 55,000	$ 55,000
Human Resources Director	Deans, Directors & Coordinators	$ 60,000	0.0	0.0	0.0	0.0	1.0	1.0		$ -	$ -	$ -	$ -	$ 60,000	$ 60,000
Bilingual/ESL Teacher	Specialty Teachers	$ 59,500	0.2	2.0	3.0	5.0	6.0	7.0		$ 9,401	$ 119,000	$ 178,500	$ 297,500	$ 357,000	$ 416,500
		$ -	0.0	0.0	0.0	0.0	0.0	0.0		$ -	$ -	$ -	$ -	$ -	$ -
		$ -	0.0	0.0	0.0	0.0	0.0	0.0		$ -	$ -	$ -	$ -	$ -	$ -
		$ -	0.0	0.0	0.0	0.0	0.0	0.0		$ -	$ -	$ -	$ -	$ -	$ -
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Total		**$ 1,453,000**	**3.0**	**23.0**	**32.0**	**47.5**	**62.5**	**72.0**		**$ 242,128**	**$ 1,374,750**	**$ 1,835,250**	**$ 2,627,250**	**$ 3,436,000**	**$ 3,921,500**

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Heritage Classical Academy
REVENUE AND EXPENSE ASSUMPTIONS

	BUDGET		ASSUMPTIONS						Notes and Descriptions of Assumptions for Start-Up Year *include in the notes the amounts from the CSP grant	Notes and Descriptions of Assumptions for Year1 through Year 5 *include in the notes the amounts from the CSP grant
	Start-Up Year 0	Year 1	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5		
	2021	2022	2021	2022	2023	2024	2025	2026		
REVENUE			Enter the % change below for which the amount entered in column F should change each year. Consider using the % changes in the Enrollment Tab.							
TOTAL STATE REVENUES		1,845,033			50.00%	49.00%	33.00%	18.00%		growth matches enrollment growth
FEDERAL REVENUES										
Charter School Program (CSP) Start-Up Grant	300,000	300,000			-41.67%	-100.00%	0.00%	0.00%	allocated to years 0-2	allocated to years 0-2
Other Federal Revenues		201,350			50.00%	49.00%	33.00%	18.00%		aligned with food service expenses plus Title and IDEA B allocations
TOTAL FEDERAL REVENUES	300,000	501,350								
TOTAL LOCAL & OTHER REVENUES	315,000	265,000			-60.00%	98.65%	-40.00%	-100.00%	see pledge letters in application packet	see pledge letters in application packet - note budget has no philanthropy in year 5, thus showing the financial model is sustainable
TOTAL REVENUE	**$ 615,000**	**$ 2,611,383**								
EXPENSES										
ADMINISTRATIVE STAFF PERSONNEL COSTS										
Executive Management	113,750								CSP grant allocation - start up team on board 6-9 months before school start	partial csp grant allocation in years 1-2
Instructional Management		82,500								
Deans, Directors & Coordinators	44,656	331,250							CSP grant allocation -summer start up work and training	partial csp grant allocation in years 1-2
CFO / Director of Finance	16,667	100,000							CSP grant allocation -summer start up work and training	
Operation / Business Manager	-	-								
Administrative Staff	3,753	47,500							CSP grant allocation -summer start up work and training	
Other - Administrative	-	-								
TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS	**$ 178,825**	**$ 561,250**								
INSTRUCTIONAL PERSONNEL COSTS										
Teachers - Regular	27,255	345,000							CSP grant allocation -summer start up work and training	salaries for all personnel aligned with market averages to be competitive
Teachers - SPED	-	28,750								
Substitute Teachers	-	-								
Teaching Assistants	-	-								
Specialty Teachers	16,215	205,250							CSP grant allocation -summer start up work and training	
Aides	4,108	52,000							CSP grant allocation -summer start up work and training	
Therapists & Counselors	-	-								
Other - Instructional	-	-								
TOTAL INSTRUCTIONAL PERSONNEL COSTS	**$ 47,578**	**$ 631,000**								
NON-INSTRUCTIONAL PERSONNEL COSTS										
Nurse	-	27,500								
Librarian	-	-								
Custodian	1,975	25,000							CSP grant allocation -summer start up work and training	
Security	-	-								
Other - Non-Instructional	-	-								
TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS	**$ 1,975**	**$ 52,500**								
TOTAL PERSONNEL EXPENSES	**$ 228,378**	**$ 1,244,750**								
PAYROLL TAXES AND BENEFITS			For each line item in the Payroll Taxes and Benefits section, enter the % of Total Personnel Expenses that line item should represent.							
Social Security	-	-	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		
Medicare	3,511	19,934	1.45%	1.45%	1.45%	1.45%	1.45%	1.45%	CSP grant allocation -summer start up work and training	partial csp grant allocation in years 1-2
State Unemployment	1,259	7,149	0.52%	0.52%	0.52%	0.52%	0.52%	0.52%	CSP grant allocation -summer start up work and training	partial csp grant allocation in years 1-2
Worker's Compensation Insurance	1,477	8,386	0.61%	0.61%	0.61%	0.61%	0.61%	0.61%	CSP grant allocation -summer start up work and training	partial csp grant allocation in years 1-2
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	16,949	96,233	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	CSP grant allocation -summer start up work and training	partial csp grant allocation in years 1-2

Heritage Classical Academy
REVENUE AND EXPENSE ASSUMPTIONS

	BUDGET		ASSUMPTIONS							
	Start-Up Year 0	Year 1	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Notes and Descriptions of Assumptions for Start-Up Year *include in the notes the amounts from the CSP grant	Notes and Descriptions of Assumptions for Year1 through Year 5 *include in the notes the amounts from the CSP grant
	2021	2022	2021	2022	2023	2024	2025	2026		
Dental Insurance	3,027	17,184	1.25%	1.25%	1.25%	1.25%	1.25%	1.25%	CSP grant allocation -summer start up work and training	partial csp grant allocation in years 1-2
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	19,370	109,980	8.00%	8.00%	8.25%	8.25%	8.25%	8.25%	CSP grant allocation -summer start up work and training	partial csp grant allocation in years 1-2 - percent increases in later years per legislative action in 2019
Staff incentive pool	-	17,184	0.00%	1.25%	1.25%	1.25%	1.25%	1.25%		
Custom Fringe #2	-	-	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%		
TOTAL PAYROLL TAXES AND BENEFITS	**$ 45,593**	**$ 276,050**								
TOTAL PERSONNEL, TAX & BENEFIT EXPENSES	**$ 273,970**	**$ 1,520,800**								

Heritage Classical Academy
REVENUE AND EXPENSE ASSUMPTIONS

	BUDGET		ASSUMPTIONS							
	Start-Up Year 0	Year 1	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Notes and Descriptions of Assumptions for Start-Up Year *include in the notes the amounts from the CSP grant	Notes and Descriptions of Assumptions for Year1 through Year 5 *include in the notes the amounts from the CSP grant
	2021	2022	2021	2022	2023	2024	2025	2026		
			Enter the % change below for which the amount entered in column F should change each year.							
CONTRACTED SERVICES										
Accounting / Audit	2,400	10,000			10.00%	20.00%	10.00%	10.00%	annual audit plus accounting resources including PEIMS student and financial software	increases aligned with student growth unless a more measured increase is warranted
Legal	-	5,000			50.00%	49.00%	33.00%	18.00%		increases aligned with student growth unless a more measured increase is warranted
Management Company Fee	-	-			0.00%	0.00%	0.00%	0.00%		
Nurse Services	-	3,500			5.00%	5.00%	5.00%	5.00%	cases for student support beyond what school nurse can handle	support nurse on staff
Food Service / School Lunch	-	157,850			50.00%	49.00%	33.00%	18.00%	$5 per day per child assuming 90% of students and their parents will want meals at school - will increase proportionally with enrollment growth and will match federal reimbursement revenue	increases aligned with student growth unless a more measured increase is warranted
Payroll Services	1,440	5,300			50.00%	49.00%	33.00%	18.00%		increases aligned with student growth unless a more measured increase is warranted
Special Ed Services	-	15,000			50.00%	49.00%	33.00%	18.00%	contracted services for speech, occupational therapy, and other non school staff services	increases aligned with student growth unless a more measured increase is warranted
Titlement Services (i.e. Title I)	-	-			0.00%	0.00%	0.00%	0.00%		
directors and officers insurance	575	975			50.00%	49.00%	33.00%	18.00%		increases aligned with student growth unless a more measured increase is warranted
Susbstitute Teacher pool	-	15,000			100.00%	50.00%	33.33%	25.00%		will contract with local services for substitute teachers when teacher aides cannot cover
Custom Contracted Services #3	-	-			0.00%	0.00%	0.00%	0.00%		
TOTAL	**$ 4,415**	**$ 212,625**								
SCHOOL OPERATIONS										
Board Expenses	1,000	1,000			0.00%	0.00%	0.00%	0.00%	meeting expenses and video expenses	
Classroom / Teaching Supplies & Materials	7,500	35,000			50.00%	49.00%	33.00%	18.00%	csp grant allocation - $182 per student in year one, increasing with enrollment	csp grant allocation in years 1-2
Special Ed Supplies & Materials	-	2,500			50.00%	49.00%	33.00%	18.00%	$125 per student in year one, increasing with enrollment	
Textbooks / Workbooks	10,000	39,000			50.00%	49.00%	33.00%	18.00%	csp grant allocation - $203 per student in year one, increasing with enrollment	csp grant allocation in years 1-2
Supplies & Materials other	5,000	1,000			50.00%	49.00%	33.00%	18.00%	$5 per student in year one, increasing with enrollment	
Equipment / Furniture	38,000	22,000			10.00%	40.00%	-10.00%	-17.00%	csp grant allocation - $115 per student beyond year 0 base amount received	csp grant allocation in years 1-2
Telephone	2,500	11,000			5.00%	5.00%	5.00%	5.00%	$478 per staff member in year one, increasing with enrollment	
Technology	4,500	22,000			5.00%	5.00%	5.00%	10.00%	$957 per staff member in year one, increasing with enrollment plus additional hardware and software for student use each year for technology in classrooms as well as a lab if desired	csp grant allocation in years 1-2
Student Testing & Assessment	-	2,500			50.00%	49.00%	33.00%	18.00%	$13 per student in year one, increasing with enrollment	
Field Trips	-	5,000			50.00%	49.00%	50.00%	50.00%	$26 per student with additional dollars once middle school starts	
Transportation (student)	-	20,000			50.00%	49.00%	40.00%	30.00%	1 van in year 1 with expenses for driver time, fuel, insurance, maintenance - adding a van every other year - and contingency dollars in case there is a Sped IEP for transportation	csp grant allocation in years 1-2 to aquire 12-passenger vans - other funding to help families in need of transporation help for their children to get to and from school
Student Services - other	-	6,300			50.00%	49.00%	33.00%	18.00%		
Office Expense	1,000	5,000			50.00%	49.00%	33.00%	18.00%		
Staff Development	5,000	7,500			50.00%	49.00%	33.00%	18.00%		
Staff Recruitment	10,500	10,500			0.00%	0.00%	0.00%	0.00%		
Student Recruitment / Marketing	15,000	15,000			0.00%	0.00%	0.00%	0.00%		
School Meals / Lunch	-	-			0.00%	0.00%	0.00%	0.00%		
Travel (Staff)	1,500	6,800			25.00%	25.00%	25.00%	15.00%		
Fundraising	-	-			0.00%	0.00%	0.00%	0.00%		
After School Program	-	15,000			50.00%	49.00%	33.00%	50.00%		
Custom Operations #1	-	-			0.00%	0.00%	0.00%	0.00%		
Custom Operations #2	-	-			0.00%	0.00%	0.00%	0.00%		
TOTAL SCHOOL OPERATIONS	**$ 101,500**	**$ 227,100**								
FACILITY OPERATION & MAINTENANCE										

Heritage Classical Academy
REVENUE AND EXPENSE ASSUMPTIONS

	BUDGET		ASSUMPTIONS							
	Start-Up Year 0	Year 1	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Notes and Descriptions of Assumptions for Start-Up Year *include in the notes the amounts from the CSP grant	Notes and Descriptions of Assumptions for Year1 through Year 5 *include in the notes the amounts from the CSP grant
	2021	2022	2021	2022	2023	2024	2025	2026		
Insurance	3,167	19,000			90.00%	50.00%	30.00%	20.00%	Insurance includes GL, Property, Umbrella, and Student Accident with minimum $2 Million coverage	
Janitorial Services	-	12,000			200.00%	40.00%	5.00%	5.00%		
Building and Land Rent / Lease	20,500	172,800			50.00%	49.00%	33.00%	18.00%	$900/student just for rent not including Tenant Improvements	aligns with market rates in community of future school
Repairs & Maintenance	-	6,100			50.00%	49.00%	33.00%	18.00%		
Security Services	-	12,500			100.00%	0.00%	0.00%	0.00%		
Utilities	2,100	19,500			50.00%	49.00%	33.00%	18.00%		
Internet	500	4,800			5.00%	5.00%	5.00%	5.00%		
Tenant Improvements not included in Rent	175,000	125,000			-100.00%	0.00%	0.00%	0.00%	partial CSP grant allocation - only allowable for renovation work necessary for an E--occupancy certifiate from City of Houston. Unallowable expenses in CSP grant will be funded by private philanthropy	partial CSP grant allocation - only allowable for renovation work necessary for an E--occupancy certifiate from City of Houston. Unallowable expenses in CSP grant will be funded by private philanthropy
Custom Facilities Operations #2	-	-			0.00%	0.00%	0.00%	0.00%		
TOTAL FACILITY OPERATION & MAINTENANCE	**$ 201,267**	**$ 371,700**								
RESERVES / CONTIGENCIES	12,000	50,000			40.00%	50.00%	30.00%	20.00%		between 2 and 2.5% of expenses per year
TOTAL EXPENSES	**$ 593,152**	**$ 2,382,225**								
NET OPERATING INCOME (before Depreciation)	**$ 21,848**	**$ 229,158**								
DEPRECIATION & AMORTIZATION					0.00%	0.00%	0.00%	0.00%		
NET OPERATING INCOME (including Depreciation)	**$ 21,848**	**$ 229,158**								

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Heritage Classical Academy

PROJECTED BUDGET / OPERATING PLAN

	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
	2021	2022	2023	2024	2025	2026
SUMMARY						
Total Revenue	**615,000**	**2,611,383**	**3,350,573**	**4,784,235**	**6,209,317**	**7,177,911**
Total Expenses	**606,902**	**2,512,225**	**3,301,009**	**4,735,820**	**6,166,650**	**7,118,789**
Net Operating Income (before Depreciation)	**8,098**	**99,158**	**49,564**	**48,415**	**42,666**	**59,122**
Revenue Per Pupil		13,600.95	11,633.93	11,178.12	10,931.90	10,745.38
Expenses Per Pupil		13,084.50	11,461.84	11,065.00	10,856.78	10,656.87
REVENUE						
TOTAL STATE REVENUES		1,845,033	2,767,549	4,123,648	5,484,452	6,471,654
FEDERAL REVENUES						
Charter School Program (CSP) Start-Up Grant	300,000	300,000	174,999	-	-	-
Other Federal Revenues	-	201,350	302,025	450,017	598,523	706,257
TOTAL FEDERAL REVENUES	300,000	501,350	477,024	450,017	598,523	706,257
TOTAL LOCAL & OTHER REVENUES	$ 315,000	265,000	106,000	210,569	126,341	-
TOTAL REVENUE	**$ 615,000**	**$ 2,611,383**	**$ 3,350,573**	**$ 4,784,235**	**$ 6,209,317**	**$ 7,177,911**
EXPENSES						
ADMINISTRATIVE STAFF PERSONNEL COSTS						
Executive Management	113,750	130,000	130,000	130,000	220,000	220,000
Instructional Management	13,750	82,500	82,500	150,000	150,000	217,500
Deans, Directors & Coordinators	44,656	331,250	361,250	390,000	482,500	482,500
CFO / Director of Finance	16,667	100,000	100,000	100,000	100,000	100,000
Operation / Business Manager	-	-	-	42,500	85,000	85,000
Administrative Staff	3,753	47,500	77,500	77,500	92,500	137,500
Other - Administrative	-	-	-	-	-	-
TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS	**$ 192,575**	**$ 691,250**	**$ 751,250**	**$ 890,000**	**$ 1,130,000**	**$ 1,242,500**
INSTRUCTIONAL PERSONNEL COSTS						
Teachers - Regular	27,255	345,000	517,500	862,500	1,150,000	1,322,500
Teachers - SPED	-	28,750	57,500	57,500	115,000	115,000
Substitute Teachers	-	-	-	-	-	-
Teaching Assistants	-	-	-	-	-	-
Specialty Teachers	16,215	205,250	351,000	556,250	702,000	876,500
Aides	4,108	52,000	78,000	156,000	234,000	260,000
Therapists & Counselors	-	-	-	-	-	-
Other - Instructional	-	-	-	-	-	-
TOTAL INSTRUCTIONAL PERSONNEL COSTS	**$ 47,578**	**$ 631,000**	**$ 1,004,000**	**$ 1,632,250**	**$ 2,201,000**	**$ 2,574,000**
NON-INSTRUCTIONAL PERSONNEL COSTS						
Nurse	-	27,500	55,000	55,000	55,000	55,000
Librarian	-	-	-	-	-	-
Custodian	1,975	25,000	25,000	50,000	50,000	50,000
Security	-	-	-	-	-	-

	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
	2021	2022	2023	2024	2025	2026
Other - Non-Instructional	-	-	-	-	-	-
TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS	$ 1,975	$ 52,500	$ 80,000	$ 105,000	$ 105,000	$ 105,000
TOTAL PERSONNEL EXPENSES	$ 242,128	$ 1,374,750	$ 1,835,250	$ 2,627,250	$ 3,436,000	$ 3,921,500

PAYROLL TAXES AND BENEFITS						
Social Security	-	-	-	-	-	-
Medicare	3,511	19,934	26,611	38,095	49,822	56,862
State Unemployment	1,259	7,149	9,543	13,662	17,867	20,392
Worker's Compensation Insurance	1,477	8,386	11,195	16,026	20,960	23,921
Custom Other Tax #1	-	-	-	-	-	-
Custom Other Tax #2	-	-	-	-	-	-
Health Insurance	16,949	96,233	128,468	183,908	240,520	274,505
Dental Insurance	3,027	17,184	22,941	32,841	42,950	49,019
Vision Insurance	-	-	-	-	-	-
Life Insurance	-	-	-	-	-	-
Retirement Contribution	19,370	109,980	151,408	216,748	283,470	323,524
Staff incentive pool	-	17,184	22,941	32,841	42,950	49,019
Custom Fringe #2	-	-	-	-	-	-
TOTAL PAYROLL TAXES AND BENEFITS	**$ 45,593**	**$ 276,050**	**$ 373,106**	**$ 534,120**	**$ 698,539**	**$ 797,241**
TOTAL PERSONNEL, TAX & BENEFIT EXPENSES	**$ 287,720**	**$ 1,650,800**	**$ 2,208,356**	**$ 3,161,370**	**$ 4,134,539**	**$ 4,718,741**
CONTRACTED SERVICES						
Accounting / Audit	2,400	10,000	11,000	13,200	14,520	15,972
Legal	-	5,000	7,500	11,175	14,863	17,538
Management Company Fee	-	-	-	-	-	-
Nurse Services	-	3,500	3,675	3,859	4,052	4,254
Food Service / School Lunch	-	157,850	236,775	352,795	469,217	553,676
Payroll Services	1,440	5,300	7,950	11,846	15,755	18,590
Special Ed Services	-	15,000	22,500	33,525	44,588	52,614
Titlement Services (i.e. Title I)	-	-	-	-	-	-
directors and officers insurance	575	975	1,463	2,179	2,898	3,420
Susbstitute Teacher pool	-	15,000	30,000	45,000	60,000	75,000
Custom Contracted Services #3	-	-	-	-	-	-
TOTAL	**$ 4,415**	**$ 212,625**	**$ 320,863**	**$ 473,578**	**$ 625,892**	**$ 741,065**

	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
	2021	2022	2023	2024	2025	2026
SCHOOL OPERATIONS						
Board Expenses	1,000	1,000	1,000	1,000	1,000	1,000
Classroom / Teaching Supplies & Materials	7,500	35,000	52,500	78,225	104,039	122,766
Special Ed Supplies & Materials	-	2,500	3,750	5,588	7,431	8,769
Textbooks / Workbooks	10,000	39,000	58,500	87,165	115,929	136,797
Supplies & Materials other	5,000	1,000	1,500	2,235	2,973	3,508
Equipment / Furniture	38,000	22,000	24,200	33,880	30,492	25,308
Telephone	2,500	11,000	11,550	12,128	12,734	13,371
Technology	4,500	22,000	23,100	24,255	25,468	28,015
Student Testing & Assessment	-	2,500	3,750	5,588	7,431	8,769
Field Trips	-	5,000	7,500	11,175	16,763	25,144
Transportation (student)	-	20,000	30,000	44,700	62,580	81,354
Student Services - other	-	6,300	9,450	14,081	18,727	22,098
Office Expense	1,000	5,000	7,500	11,175	14,863	17,538
Staff Development	5,000	7,500	11,250	16,763	22,294	26,307
Staff Recruitment	10,500	10,500	10,500	10,500	10,500	10,500
Student Recruitment / Marketing	15,000	15,000	15,000	15,000	15,000	15,000
School Meals / Lunch	-	-	-	-	-	-
Travel (Staff)	1,500	6,800	8,500	10,625	13,281	15,273
Fundraising	-	-	-	-	-	-
After School Program	-	15,000	22,500	33,525	44,588	66,882
Custom Operations #1	-	-	-	-	-	-
Custom Operations #2	-	-	-	-	-	-
TOTAL SCHOOL OPERATIONS	**$ 101,500**	**$ 227,100**	**$ 302,050**	**$ 417,606**	**$ 526,094**	**$ 628,399**
FACILITY OPERATION & MAINTENANCE						
Insurance	3,167	19,000	36,100	54,150	70,395	84,474
Janitorial Services	-	12,000	36,000	50,400	52,920	55,566
Building and Land Rent / Lease	20,500	172,800	259,200	386,208	513,657	606,115
Repairs & Maintenance	-	6,100	9,150	13,634	18,133	21,396
Security Services	-	12,500	25,000	25,000	25,000	25,000
Utilities	2,100	19,500	29,250	43,583	57,965	68,398
Internet	500	4,800	5,040	5,292	5,557	5,834
Tenant Improvements not included in Rent	175,000	125,000	-	-	-	-
Custom Facilities Operations #2	-	-	-	-	-	-
TOTAL FACILITY OPERATION & MAINTENANCE	**$ 201,267**	**$ 371,700**	**$ 399,740**	**$ 578,266**	**$ 743,626**	**$ 866,784**
RESERVES / CONTIGENCIES	12,000	50,000	70,000	105,000	136,500	163,800
TOTAL EXPENSES	**$ 606,902**	**$ 2,512,225**	**$ 3,301,009**	**$ 4,735,820**	**$ 6,166,650**	**$ 7,118,789**
NET OPERATING INCOME (before Depreciation)	**$ 8,098**	**$ 99,158**	**$ 49,564**	**$ 48,415**	**$ 42,666**	**$ 59,122**
DEPRECIATION & AMORTIZATION	-	-	-	-	-	-
NET OPERATING INCOME (including Depreciation)	**$ 8,098**	**$ 99,158**	**$ 49,564**	**$ 48,415**	**$ 42,666**	**$ 59,122**

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Heritage Classical Academy
ESTIMATE OF STATE AID ENTITLEMENT

Summary of Finance Description	Weight or Rate	
General Instructions and Notes		182.400
Prior Year Refined ADA		0.000
SPECIAL EDUCATION FTE		
Homebound (Code 01)	5.0	0.000
Hospital Class (Code 02)	3.0	0.000
Speech Therapy (Code 00)	5.0	0.396
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 Special Education FTE		0.396
Total Special Education Weighted FTE		1.979
EXTENDED YEAR SERVICES (EYS) SPECIAL EDUCATION FTE		
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	1.15	9.500
Regular Career & Technology FTEs	1.35	0.000
Advanced Career & Technology Education FTEs	$ 50	0.000
P-TECH	$ 50	0.000
New Tech Network	$ 50	0.000
Regular Program ADA		182.004
Dyslexia	0.10	8.000
Public Education Grant	0.10	0.000
Early Education	0.10	0.000
State Compensatory Education Enrollment	0.25	144.000
Pregnancy Related FTEs	2.41	0.000
Non-Economically Disadvantaged students without disability living in a residential treatment facility whose parents do not reside in district	0.20	0.000
Bilingual LEP ADA	0.10	66.500
Bilingual LEP Dual Language One-Way, Two-Way	0.15	0.000
Bilingual Non LEP Dual Language One-Way, Two-Way	0.05	0.000
Adjusted GYA		1.4347
Total Weighted Average Daily Attendance (WADA)		269.6070
State Average Funding Components		

Per Capita Rate		$ 476.710
District Basic Allotment (DBA)		$ 6,159.00
ASF ADA		$ 3,294.69
District Tax Rate Level 1 (DTR1)		$ 0.057112
Level 1 Entitlement		$ 98.56
District Tax Rate Level 2 (DTR2)		$ 0.024659
Level 2 Entitlement		$ 49.28
Interest & Sinking Rate		$ -
EDA Guaranteed Yield (GY)		$ 38.58
Program Intent Codes -TIER I Allotments		
11-Regular Program Allotment TEC 48.051		$ 1,120,964
Small and Mid-size Allotment TEC 48.101		$ 192,979
25-Bilingual Education Allotment TEC 48.105 (spend 55% of amount)		$ 40,957
99-New Instructional Facility Allotment		$ -
11-Public Education Grant TEC 48.107		$ -
36-Early Education Allotment TEC 48.108 (spend 100% of amount)		$ -
37-Dyslexia Allotment TEC 48.103 (spend 100% of amount)		$ 2,636
School Safety Allotment TEC 42.168		$ 1,773
Special Education Detail:		
Regular Special Education		$ 12,190
Mainstream		$ 67,287
Residential Care and Treatment		$ -
State Schools		$ -
Non Public Contracts		$ -
Extended Year Special Education		$ -
23-Special Education Adjusted Allotment TEC 48.102 (spend 55% of amount)		$ 79,477
Career & Technology Detail:		
Regular Career & Technology (CTE) Allotment		$ -
Advanced CTE Allotment		$ -
P-TECH		$ -
New Tech Network		$ -
22-Career and Technology Allotment TEC 48.106 (spend 55% of amount)		$ -
State Compensatory Education Detail:		
State Compensatory Allotment		$ 221,724
Pregnancy Related		$ -
Non-Economically Disadvantaged students without disability living in a residential treatment facility whose parents do not reside in district		$ -
24-Compensatory Education Allotment TEC 48.104 (spend 55% of amount)		$ 221,724
Transportation Detail:		
Regular		$ -
Private		$ -
Special Education		$ -
Career & Technology Education		$ -
99-Transportation Allotment TEC 48.151		$ -
TOTAL COST OF TIER I / STATE SHARE OF TIER I		**$ 1,660,510**
TIER II		
Tier II Level 1		$ 151,761

Tier II Level 2		$ 32,763
TOTAL TIER II		**$ 184,523**
OTHER PROGRAMS		
Charter has at least an acceptable academic performance rating?		yes
Charter Schools Facility Funding TEC 12.106(d)		0.000
TOTAL OTHER PROGRAMS		**$ -**
TOTAL STATE AID		**$ 1,845,033**
Available School Fund (ASF)		$ -
Foundation School Fund (FSF)		$ 1,845,033

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Heritage Classical Academy

PAYMENT FORMULA EXAMPLE

Total State Aid	$	1,845,033
Adjustments to Allotments	$	-
Less Total Paid to Date	$	-
FSP Remaining Balance	$	1,845,033

Payment Month	# of Remaining Payments	% of Unpaid Balance	Estimated Payments Schedule
September	12	8.3%	$ 153,138
October	11	9.1%	$ 153,962
November	10	10.1%	$ 155,331
December	9	11.1%	$ 153,469
January	8	12.4%	$ 152,412
February	7	14.4%	$ 155,048
March	6	16.6%	$ 152,998
April	5	19.9%	$ 152,966
May	4	25.1%	$ 154,543
June	3	33.2%	$ 153,107
July	2	49.7%	$ 153,105
August	1	100.0%	$ 154,954
		Total Payments	**$ 1,845,033**

1/25/2021 10:03

Heritage Classical Academy

FINANCIAL PLAN WORKBOOK SUMMARY

	Start-Up Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
	2021	2022	2023	2024	2025	2026
REVENUE						
Total State Revenues		$ 1,845,033	$ 2,767,549	$ 4,123,648	$ 5,484,452	$ 6,471,654
Federal Revenues						
Charter School Program (CSP) Start-Up Grant	$ 300,000	$ 300,000	$ 174,999	$ -	$ -	$ -
Other Federal Revenues	$ -	$ 201,350	$ 302,025	$ 450,017	$ 598,523	$ 706,257
Total Federal Revenues	$ 300,000	$ 501,350	$ 477,024	$ 450,017	$ 598,523	$ 706,257
Total Local and Other Revenue	$ 315,000	$ 265,000	$ 106,000	$ 210,569	$ 126,341	$ -
TOTAL REVENUE	**$ 615,000**	**$ 2,611,383**	**$ 3,350,573**	**$ 4,784,235**	**$ 6,209,317**	**$ 7,177,911**
EXPENSES						
PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES						
Total Administrative Staff Personnel Costs	$ 192,575	$ 691,250	$ 751,250	$ 890,000	$ 1,130,000	$ 1,242,500
Total Instructional Personnel Costs	$ 47,578	$ 631,000	$ 1,004,000	$ 1,632,250	$ 2,201,000	$ 2,574,000
Total Non-Instructional Personnel Costs	$ 1,975	$ 52,500	$ 80,000	$ 105,000	$ 105,000	$ 105,000
Total Payroll Taxes and Benefits	$ 45,593	$ 276,050	$ 373,106	$ 534,120	$ 698,539	$ 797,241
TOTAL PERSONNEL, PAYROLL TAXES, AND BENEFITS EXPENSES	**$ 287,720**	**$ 1,650,800**	**$ 2,208,356**	**$ 3,161,370**	**$ 4,134,539**	**$ 4,718,741**
NON-PAYROLL RELATED EXPENSES						
Total Contracted Services	$ 4,415	$ 212,625	$ 320,863	$ 473,578	$ 625,892	$ 741,065
Total School Operations	$ 101,500	$ 227,100	$ 302,050	$ 417,606	$ 526,094	$ 628,399
Total Facilities Operations and Maintenance	$ 201,267	$ 371,700	$ 399,740	$ 578,266	$ 743,626	$ 866,784
Reserves / Contingencies	$ 12,000	$ 50,000	$ 70,000	$ 105,000	$ 136,500	$ 163,800
TOTAL NON-PAYROLL RELATED EXPENSES	**$ 319,182**	**$ 861,425**	**$ 1,092,653**	**$ 1,574,450**	**$ 2,032,112**	**$ 2,400,048**
TOTAL EXPENSES	**$ 606,902**	**$ 2,512,225**	**$ 3,301,009**	**$ 4,735,820**	**$ 6,166,650**	**$ 7,118,789**
NET OPERATING INCOME (before depreciation)	**$ 8,098**	**$ 99,158**	**$ 49,564**	**$ 48,415**	**$ 42,666**	**$ 59,122**
STUDENT ENROLLMENT						
Projected Student Enrollment		192	288	428	568	668
Revenue Per Pupil		$ 13,601	$ 11,634	$ 11,178	$ 10,932	$ 10,745
Expenses Per Pupil		$ 13,085	$ 11,462	$ 11,065	$ 10,857	$ 10,657

Attachment 32: Budget Narrative

(The Budget Narrative has been updated from the Budget Narrative on pages 421-425 in the HCA GEN 25 charter application.)

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.

Pending applicant eligibility and availability of federal funds, the application provides for up to $900,000 in federal CSP funding. The applicant must include and budget with these funds when completing the budget narrative.

Applicants who would be unable to meet the definition of a charter school, as defined in ESSA, Section 4310(2) are ineligible to receive CSP funds through this application. Consequently, any applicant who would be ineligible should NOT budget the funds outlined above.

For purposes of this grant, the term charter school means a public school that:

a. in accordance with TEC, Chapter 12, is exempt from significant State or local rules that inhibit the flexible operation and management of the school, but not from any rules relating to the other requirements of this section;
b. is created by a developer as a public school, or is adapted by a developer from an existing public school, and is operated under public supervision and direction;
c. operates in pursuit of a specific set of educational objectives determined by the school's developer and agreed to by the authorized public chartering agency;
d. provides a program of elementary or secondary education, or both;
e. is nonsectarian in its programs, admissions policies, employment practices, and all other operations, and is not affiliated with a sectarian school or religious institution;
f. does not charge tuition
g. complies with the Age Discrimination Act of 1975, 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 Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.), Section 444 of the General Education Provisions Act (20 U.S.C. 1232g) (commonly referred to as the ''Family Educational Rights and Privacy Act of 1974''), and Part B of the Individuals with Disabilities Education Act;

h. is a school to which parents choose to send their children, and that admits students on the basis of a lottery, if more students apply for admission than can be accommodated;

i. agrees to comply with the same Federal and State audit requirements as do other elementary schools and secondary schools in the State, unless such requirements are specifically waived for the purposes of this program;

j. meets all applicable Federal, State, and local health and safety requirements;

k. operates in accordance with State law; and

l. has a written performance contract with the authorized public chartering agency in the State that includes a description of how student performance will be measured in charter schools pursuant to State assessments that are required of other schools and pursuant to any other assessments mutually agreeable to the authorized public charter agency and the charter school.

Budget Narrative

Enrollment

Heritage Classical Academy (HCA) will balance its focus on ensuring the students receive a strong educational program with ensuring the school remains in a healthy financial position to continue serving the students, families and community. This balance starts with enrollment. HCA envisions serving students in PreK - 8th grade, but to build a solid foundation with a supportive culture, year 1 will start with just Kindergarten and 1st grade. Starting with more grades would help the budget health, but risk the educational and cultural strong start. To ensure the budget is not at risk, HCA will still start with more than 150 students and grow the school over eight years to a PreK-8th grade school that serves over 1,000 students. Because Kindergarten is an easier grade in which to recruit families and students, HCA will budget for a full Kindergarten class of 96 students and focus recruitment efforts on filling up just one more grade level - first grade - with 96 students as well. To help meet enrollment recruitment goals, HCA is including on the staff a Director of Enrollment/Community Outreach who will start in the start-up year. The fact that HCA has a million-dollar pledge from Saunders Foundation also allows the school to have a buffer in case of enrollment risk, as the dollars allocated by that grant could be accelerated as needed.

Kindergarten and 1st grade in all years of the school will have 24 children per classroom. When HCA grows down to PreK in year 3, those classrooms also will have a maximum enrollment of 22 children per classroom (with a second adult in the PreK classrooms). The maximum enrollment in the 2nd - 4th grade classrooms will be 24 students, and the enrollment in the 5th - 8th middle school grade classrooms will be 25 students. Again, the balance here is to have enough students in the classroom to have a sustainable budget, but limit how much better the budget could be ensuring the class sizes are manageable to deliver the excellent instruction and personalized attention that will be a cornerstone of HCA. The school also will have several teacher aides beyond the PreK classrooms, so when there is a need to have a lower student/teacher ratio in any classroom for specific instructional goals, there is available faculty to address this need.

The attendance rate goal for HCA is at least 98%, but to be more conservative for budgeting purposes, our budget assumes an attendance rate of 95%. At 95%, every student in the school would be missing an average of 9 days per year, or the equivalent of one day per month. If this attendance rate were actually happening at HCA, the Principals, Superintendent, Board, and Director of Community Outreach/Enrollment would be having emergency meetings to plan how to respond in a more supportive way to our families and community to ensure the children were coming to school more frequently. Also of note, staffing the school with a Director of Community Outreach is one strategy to ensure our students meet the attendance goal of 98% and thus, provide a healthier budget than what is assumed in our application budget.

In its desire to serve all children in the community, HCA is assuming a special education population of 10-11%, as well as a Gifted and Talented population of 10% (even if there is no longer GT funding). HCA will serve children to meet their needs across the entire academic spectrum. The Special Education enrollment assumes students with Individual Education Plans (IEP's) ranging from Speech to Mainstream and HCA will provide a continuum of services for special education students. HCA also aligns its Bilingual/ESL enrollment assumptions with the data from the community in which we intend to operate. That assumption is 36-37%

Bilingual/ESL, which is the average Bilingual/ESL enrollment of the three school districts in HCA's main geographic boundary. We anticipate a higher Bilingual/ESL population in the early grades, and after several years in HCA, those students will begin to be mainstreamed. HCA assumes one-quarter of the homeroom teachers per grade in elementary school will need to be Bilingual/ESL certified, and HCA has budgeted a higher average salary for these teachers to assist with recruiting teachers with these certifications. HCA is strategically searching for a facility in the community that would be accessible to families with economic challenges as well as the general population. Our goal is to serve all the children and families in Northwest Houston, which means our school will be majority low-income. Our staffing - including bilingual/ESL teachers, additional aides, special education faculty, a counselor, a social worker, and an enrollment/ community outreach staff member - reflect our commitment to serving ALL children in our community. Lastly, given HCA will start serving young children, and eventually, PreK children where HCA is their first public school. HCA has staffed accordingly to ensure a robust early identification process to both be compliant with state and federal law's Child Find and do a quality job of serving children with special needs as quickly as possible after enrollment.

The enrollment growth will be a methodical one: add a grade level per year through 8th grade, and in year 3, when the school is more stable after a two-year start, the school also will grow down to PreK 4 year olds. In year 4, the school will include a half-day program for PreK 3 year olds as well, thus growing a PreK3- 8th grade school in eight years.

Personnel

People make the difference, so a majority of the charter school budget will be allocated to personnel, and a majority of the personnel will be teachers. There will be one teacher for every cohort of 22 students (PreK), 24 students (1st - 4th grade), and 25 students (5th - 8th grade). The homeroom teachers will be supported by Instructional Aides, with one Aide in every PreK classroom, and 4 additional Aides supporting the elementary grade classrooms. Those K-5 Aides will also serve as substitute teacher support as needed, with a dual purpose of training the aides to become lead teachers when they have the necessary educational degrees. There is money each year in the budget to contract with a substitute teacher pool, so the school does not need to rely solely on Aides to be substitutes. Beyond homeroom teachers, HCA will have specialty teachers to provide the students with a well-rounded education, teaching subjects such as Music, Art, Science, Spanish, and PE. The specialty teachers also include Bilingual/ESL certified teachers at every grade level (2 in the first year and 7 by year 5) to ensure Bilingual/ESL students will have teachers available to them who are trained and certified to deliver the necessary services. The average teacher salary is $57,500 to be competitive with the salary scales of the school districts in the Houston area. The average salaries for the Bilingual/ESL teachers are higher at $59,500 to ensure the school can attract teachers with these additional certifications and instructional skills. Lastly, one teacher at each grade level will be designated as Master Teacher, assisting the campus leadership with grade level management of the rest of the faculty. Those positions come with a $1,000 stipend that is built into the calculations of the average teacher salaries. Our budget is not incorporating annual salary increases given the revenue assumptions do not increase annually as well. HCA plans to give annual teacher salary increases assuming state and federal revenue increase accordingly. Historical teacher salaries in Houston increase in years when state aid increases and remains flat in periods of recession and when state aid does not increase or occasionally decreases.

Other personnel at the campus level include a full-time Special Coordinator and half-time Special Education teacher in year 1 increasing to a full-time Special Education teacher and a full-time Special Education Coordinator in year 2 to ensure that HCA in its first two years will meet the needs of children with special needs. HCA will employ a full-time Counselor in year 1, a full-time EL Specialist in year 1, 2 Instructional Aides, a half-time Social Worker (growing to full time by Year 3), an Office Manager, a full-time Custodian (plus contracted services for nighttime cleaning), and a Lower School Principal who will lead the campus. Even if the school cannot afford all the positions to be full-time in year 1 with lower enrollment, it is important to have these services available to the children and families right away, and their workload will grow as the enrollment grows. Given how important it is that the school serve special education students and Bilingual/ESL students from the beginning, it is a priority investment to have a Special Education Coordinator as well as the EL Specialist to support the homeroom teachers right away. As the school grows to full size, other positions that will be added include two Special Education teachers (beyond the Special Education Coordinator), additional specialist teachers, a Middle School Principal to lead the middle school (grades 6-8) faculty with outstanding credentials in English, Science, Math, History, and Latin; a full-time Social Worker, 2 Assistant Principals, 7 Instructional Aides, a second Custodian, and 3 Office Clerks.

Supporting the campus staff will be a lean central office staff in year 1, consisting of the CEO/Superintendent, PEIMS Manager, Chief Financial Officer, a part-time Director of Enrollment/Community Outreach (growing to full-time in year 2), and a part-time Director of IT (growing to full time in year 4). As the enrollment grows, the charter will add a Chief Operating Officer, Chief Academic Officer, Nurse, HR Director, Facilities Manager, Food Service Manager, and data entry clerk.

Start-Up Budget

We are budgeting for all the year 1 personnel to start in year 0, with the CEO/Superintendent starting one month after the charter hopefully is awarded, and all the teachers starting 3 weeks before the school year begins. Other personnel will start between 4-14 weeks before the school year begins. In this time, the personnel will undergo professional development in their field, they will collectively set the charter school culture, and they will prepare for the students to arrive.

Resources will also be dedicated to student and staff recruitment in year 0, as it will continue in every year to help ensure the school is filled with enrollment and has an excellent faculty. Additional dollars will be allocated to the classroom furniture, instructional materials and equipment, technology, and professional development for the staff. Lastly, the Board will meet monthly during the start-up year to govern the charter as well as participate in board training, so there will be expenses to support these board meetings and trainings.

We are assuming our facility lease will start two months before the school year begins, and we are assuming that $175,000 will need to be spent on getting the facility up to code and ready as a school that will be beyond the Tenant Improvements built into our lease.

The revenue in the Start-up year, as well as in the growth years, comes from pledges secured by the Board (see Attachment 33) that total $1,023,000. HCA is fortunate to have secured these

pledges and is using these precious resources to supplement the state and federal revenue in years 0 through year 4. The pledge payment timeline could be accelerated in these years to offset any enrollment risk or other unexpected expenses beyond Contingency. It should be noted that HCA is not budgeting any philanthropy/local revenue in year 5, thus showing that the charter is sustainable on the state and federal revenue by the time it grows to PreK -5th grade enrollment in that year.

Assumptions

HCA is budgeting 18.83% for benefits on top of salaries, and this percent grows to 20.33% over the growth years, as state legislation was enacted to increase district contributions to the state retirement system (TRS) over the next several years.

Contracted services include accounting/audit, legal, special education services such as testing and other services beyond the scope of the special education teachers, nursing services before a full time Nurse is hired, payroll services, and food services. The food services will include breakfast, lunch, and snacks for the students, and we are assuming the federal nutrition program reimbursement will match the expenses.

HCA will dedicate sufficient resources to support the classical education curriculum and other education needs of the students. The school will have liability insurance of at least $2 million with an additional umbrella coverage so that the school will have $5 million of coverage, plus Directors and Officers insurance, Property Insurance, and Workers Compensation Insurance. There will also be a security service hired to provide a guard during school hours to help ensure the students and faculty are safe. The health and safety of our children is Priority 1A, with Priority 1B to ensure the students flourish in the classrooms.

Given HCA plans to serve the community surrounding the campus, the school is planning to assist families with transportation needs for their children. We are also budgeting for transportation in case we enroll a special education student(s) whose IEP requires transportation. Our annual transportation budget increases annually to allow for transportation support to be traditional school buses and/or van service, depending on the needs of our families. Transportation allocations begin in year 1 with $20,000 and by year 5 this allocation grows to $81,354.

HCA has budgeted an annual contingency of 2 - 2.5% of the overall budget to account for any areas that the budget assumptions were too low or for any surprise expenses. Beyond the contingency, it was important to also see a surplus annually. While we do not want to hold resources that can be used by the school to help children and families, this budget is a balance of allocating those resources with being good stewards of the public and private dollars. This contingency and budget also will offset any inflation on salaries and expenses beyond what is expected in the economy. Given this budget assumes flat revenues from the state and federal government in all years, our budget has kept the expense escalation flat as well. Therefore, our budget allows for increasing revenues to match increasing expenses. Should that match not happen, the contingency and surplus will cover areas in the budget where the expenses are outpacing the revenues.

Attachment 33: Evidence of Other Financial Support

(Attachment 33 has been updated from Attachment 33 on pages 437 in the HCA GEN 25 charter application.)

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."

SAUNDERS FOUNDATION

602 SAWYER STREET, SUITE 720
HOUSTON, TX. 77007

713-914-9778

January 13, 2021

The Texas Education Agency
Generation Twenty-six Charter School Application
1701 N. Congress Ave.
Austin, TX. 78701

Re: Commitment of Start-Up Funds to Heritage Classical Academy
Project Start Date: August 2021

To Whom It May Concern,

This letter is to share that Heritage Classical Academy has been awarded a school start-up grant from the Saunders Foundation in the amount of $750,000, with an additional $250,000 available if needed to cover early year operating losses. This grant will serve to support the school's start-up needs for the launch of its campus along with covering any operating revenue shortfalls which might occur in the school's first few years of operation.

The grant is subject to the following restrictions:

1. Seven hundred fifty thousand ($750,000) is contingent upon Heritage Ed receiving a charter from the State of Texas;
2. In the event start-up operating losses are larger than budgeted, the Saunders Foundation is prepared to grant an additional $250,000 in funding in years 2 – 5 of operations; and
3. Heritage Ed. must maintain its tax-exempt 501 (c)(3) status.

Thank you for your consideration of Heritage Classical Academy. We are excited for more Houston families to gain access to a high-quality, classical school choice option.

Sincerely,

F. M. Saunders
Chairman

Heritage Classical Academy Pledges/Donations

Last Name	First Name	Pledge/Donation	Notes
[redacted]		$1,000.00	check
		$100.00	
		$500.00	
		$500.00	
		$1,000.00	
		$200.00	
		$100.00	
		$500.00	
		$100.00	
		$1,000.00	
		$100.00	
		$100.00	
		$500.00	
		$100.00	
		$50.00	
		$100.00	
		$1,000.00	
		$250.00	
		$50.00	
		$250.00	
		$500.00	
		$8,000.00	
[redacted]		$1,000.00	check
		$3,500.00	1500 check + 2500 pledge
		$500.00	cash
		$500.00	cash
		$500.00	check
		$9,000.00	
		$15,000.00	

Foundations/Corporations

Saunders Foundation	$1,000,000.00
	$1,000,000.00

HERITAGE
CLASSICAL ACADEMY

PLEDGE FORM

I am pleased to pledge a gift of $ 200.00, to be paid on the condition that Heritage Ed.* receives a charter from the Texas Education Agency to operate Heritage Classical Academy in Houston, Texas.

Note: It is expected that the Texas Education Agency will award charters in mid-September 2020. If Heritage Classical Academy is granted a charter at that time, my/our pledge will be due and payable on or before May 31, 2021.

[redacted]

Signature: [redacted]

* Heritage Ed. is a Texas non-profit corporation.

HERITAGE
CLASSICAL ACADEMY

PLEDGE FORM

I am pleased to pledge a gift of $ 500.00, to be paid on the condition that Heritage Ed.* receives a charter from the Texas Education Agency to operate Heritage Classical Academy in Houston, Texas.

Note: It is expected that the Texas Education Agency will award charters in mid-September 2020. If Heritage Classical Academy is granted a charter at that time, my/our pledge will be due and payable on or before May 31, 2021.

[redacted]

Signature: Jeanty Lee

* Heritage Ed. is a Texas non-profit corporation.

Subject: Fwd: [Heritage] Contact - new submission
Date: Friday, January 17, 2020 at 11:59:58 AM Central Standard Time
From: Farrell Saunders
To: Brenda Harvell, Stuart Saunders
Category: Farrell

Begin forwarded message:

From: "[redacted]" <no-reply+9dda0cc33083@crm.wix.com>
Subject: **[Heritage] Contact - new submission**
Date: January 16, 2020 at 8:11:26 PM CST
To: [redacted]
Reply-To: "Tracy Poerschke" <592522cf-184c-4c01-899e-1f9a8f570898@crm.wix.com>

[redacted] just submitted your form: Contact on Heritage

[redacted]

Short Text Field 2: $1,000

Dropdown Field: Friend

HERITAGE
CLASSICAL ACADEMY

PLEDGE FORM

I am pleased to pledge a gift of $ 2500.00, to be paid on the condition that Heritage Ed.* receives a charter from the Texas Education Agency to operate Heritage Classical Academy in Houston, Texas.

Note: It is expected that the Texas Education Agency will award charters in mid-September 2020. If Heritage Classical Academy is granted a charter at that time, my/our pledge will be due and payable on or before May 31, 2021.

[redacted]

* Heritage Ed. is a Texas non-profit corporation.

HERITAGE
CLASSICAL ACADEMY

PLEDGE FORM

I am pleased to pledge a gift of $ 9,000.00, to be paid on the condition that Heritage Ed.* receives a charter from the Texas Education Agency to operate Heritage Classical Academy in Houston, Texas.

Note: It is expected that the Texas Education Agency will award charters in mid-September 2020. If Heritage Classical Academy is granted a charter at that time, my/our pledge will be due and payable on or before May 31, 2021.

[redacted]

* Heritage Ed. is a Texas non-profit corporation.

HERITAGE
CLASSICAL ACADEMY

PLEDGE FORM

I am pleased to pledge a gift of $ 500.00 , to be paid on the condition that Heritage Ed.* receives a charter from the Texas Education Agency to operate Heritage Classical Academy in Houston, Texas.

Note: It is expected that the Texas Education Agency will award charters in mid-September 2020. If Heritage Classical Academy is granted a charter at that time, my/our pledge will be due and payable on or before May 31, 2021.

[redacted]

* Heritage Ed. is a Texas non-profit corporation.

602 Sawyer Street, Suite 720, Houston, Texas. 77007

HERITAGE
CLASSICAL ACADEMY

PLEDGE FORM

I am pleased to pledge a gift of $500.00, to be paid on the condition that Heritage Ed.* receives a charter from the Texas Education Agency to operate Heritage Classical Academy in Houston, Texas.

Note: It is expected that the Texas Education Agency will award charters in mid-September 2020. If Heritage Classical Academy is granted a charter at that time, my/our pledge will be due and payable on or before May 31, 2021.

[redacted]

* Heritage Ed. is a Texas non-profit corporation.

HERITAGE
CLASSICAL ACADEMY

PLEDGE FORM

I am pleased to pledge a gift of $ 100, to be paid on the condition that Heritage Ed.* receives a charter from the Texas Education Agency to operate Heritage Classical Academy in Houston, Texas.

Note: It is expected that the Texas Education Agency will award charters in mid-September 2020. If Heritage Classical Academy is granted a charter at that time, my/our pledge will be due and payable on or before May 31, 2021.

[redacted]

* Heritage Ed. is a Texas non-profit corporation.

602 Sawyer Street, Suite 720, Houston, Texas. 77007

Subject: Fwd: [Heritage] Contact - new submission
Date: Friday, January 17, 2020 at 12:01:57 PM Central Standard Time
From: Farrell Saunders
To: Brenda Harvell, Stuart Saunders
Category: Farrell

SAMPLE of SMALLER PLEDGES THROUGH ASCEND

Begin forwarded message:

From: [redacted]

Kevin Ellis just submitted your form: Contact
on Heritage

[redacted]

Short Text Field 2: 500

Dropdown Field: Friend

From: Jodie Holstien [redacted]
Subject: Brown Foundation/Will Mathis grant
Date: January 12, 2021 at 9:48 AM
To: sdsaunders@missionheights.net

Hi Stuart,

Will Mathis has recommended a grant from his Brown Foundation discretionary funds for Heritage Ed in the amount of $5,000.00 toward General Operating Expenses.

Pending approval at the Foundation's February Board meeting, the grant agreement will be emailed by DocuSign in late February to you for signature.

Please let me know if you have any questions.

Thanks,
Jodie

Jodie Holstien
The Brown Foundation, Inc.

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/.

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

If applicable, applicants must submit the statements above even if the statements indicate a zero balance.

Heritage Ed has not had a professional audit conducted and therefore does not have an Audit Report. Attached are its most recent financial documents.

Heritage Ed.
Balance Sheet
As of December 31, 2020

	Dec 31, 20
ASSETS	
Current Assets	
Checking/Savings	
SouthTrust Bank Heritage Ed.	129,396.08
Total Checking/Savings	129,396.08
Total Current Assets	129,396.08
TOTAL ASSETS	**129,396.08**
LIABILITIES & EQUITY	
Equity	
Unrestricted Net Assets	17,348.63
Net Income	112,047.45
Total Equity	129,396.08
TOTAL LIABILITIES & EQUITY	**129,396.08**

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, 2019, 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, 2019, 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, 2019."

HERITAGE
CLASSICAL ACADEMY

January 13, 2021

Commissioner Mike
Morath Texas
Education Agency
1701 N. Congress
Avenue Austin, TX.
78701

Re: Heritage Classical Academy - Credit Report

Dear Commissioner Morath,

I am writing to provide some context to the attached Dun & Bradstreet credit report. First, as a reminder, the credit report is in the name of EnterpriseU. We changed the name of our Nonprofit corporation about 2 years ago, and the name change has not yet found its way into Dun & Bradstreet's system.

In addition, I wish to point out that there is very limited credit information in the report. Some of the data fields have been marked with information but most are marked "unavailable" because Heritage Ed (formerly EnterpriseU) has not conducted much business and certainly never borrowed any money. Unfortunately, when there is limited data, their system starts making assumptions, which results in a low credit score and an unfair prediction of credit risk.

Today Heritage Ed is a nonprofit company with several thousand in cash in a checking account, over $1 million in pledges, and zero liabilities. Nevertheless, the credit report looks awkward because of a lack of credit history and virtually. No business activity.

Sincerely,

Stuart D. Saunders
President

INSIGHTS

ALERTS HELP

Update your information with D-U-N-S® Manager

Report as of: 01-15-2021

Enterpriseu

ACTIVE SINGLE LOCATION

Address: 7500 San Felipe St Ste 1070, Houston, TX, 77063, United States

Manage your bu
with ClientBook
from 1-800Acco
Your first two months are
Start for Fr
1-800ACCOUNT

SCORES AND RATINGS

PAYDEX® Score	Delinquency Predictor Percentile	Financial Stress Percentile	Supplier Evaluation Risk Rating
NO CHANGE	NO CHANGE	NO CHANGE	NO CHANGE
SINCE 2020-06-18	SINCE 2020-06-18	SINCE 2020-06-18	SINCE 2020-06-18

Monitor in Real-time
to Gain Valuable Insights into Your Business Credit
Get alerts when changes occur and have 24/7 access to the information in your Dun & Bradstreet business credit file.
$39/mo ADD TO CART
CreditMonitor℠

Monitor & Take Action
to Help Build Your Business Credit File
Potentially build your D&B credit file by submitting Trade References, subject to verification and acceptance,* to Dun & Bradstreet and get alerts when changes are made to your file.
$149/mo ADD TO CART
CreditBuilder

COMPANY PROFILE

D-U-N-S
02-448-6233

Ownership
Not publicly traded

Mailing Address
United States

Annual Sales
US$ 94,459

Employees
7

Age (Year Started)
3 (2018)

Line of Business
Nonclassified establishment

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. A screen shot of the form will not fulfill this attachment requirement.

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.

CALLOWAY, STINSON & CO., P.C.
8554 KATY FREEWAY SUITE 110
HOUSTON, TX 77024
713-468-4133

January 14, 2021

CONFIDENTIAL

HERITAGE ED
602 SAWYER STREET STE 720
HOUSTON, TX 77007

Dear Stuart:

We have prepared the following returns from information provided by you without verification or audit.

Return of Organization Exempt From Income Tax (Form 990)

We suggest that you examine these returns carefully to fully acquaint yourself with all items contained therein to ensure that there are no omissions or misstatements. Attached are instructions for signing and filing each return. Please follow those instructions carefully.

Enclosed is any material you furnished for use in preparing the returns. If the returns are examined, requests may be made for supporting documentation. Therefore, we recommend that you retain all pertinent records for at least seven years.

In order that we may properly advise you of tax considerations, please keep us informed of any significant changes in your financial affairs or of any correspondence received from taxing authorities.

If you have any questions, or if we can be of assistance in any way, please call.

Sincerely,

CALLOWAY, STINSON & CO., P.C.

Filing Instructions

HERITAGE ED

Exempt Organization Tax Return

Taxable Year Ended June 30, 2020

Date Due: May 17, 2021

Remittance: None is required. Your Form 990 for the tax year ended 6/30/20 shows no balance due.

Mail To: Department of the Treasury
Internal Revenue Service Center
Ogden, UT 84201-0027

If a private delivery service is used, mail to:
OSPC
1973 Rulon White Blvd.
Ogden, UT 84201-1000

Signature: The return should be signed and dated on Page 1 by an officer representing the organization.

COPYRIGHT MATERIAL

27 pages have 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 to schedule an appointment.

Taxable Interest on Investments

Description	Amount	Unrelated Business	Exclusion Code	Postal Code	Acquired after 6/30/75	US Obs ($ or %)
	$ 7					
TOTAL	$ 7					

Form 990, Part IX, Line 11g - Other Fees for Service (Non-employee)

Description	Total Expenses	Program Service	Management & General	Fund Raising
OTHER CONSULTANTS	$ 43,172	$	$ 43,172	$
TOTAL	$ 43,172	$ 0	$ 43,172	$ 0

Schedule A, Part II, Line 12 - Current year

Description	Amount
	$ 7
TOTAL	$ 7

LETTER OF SPECIAL ASSURANCES

Sponsoring Entity: **Heritage Ed.**

Proposed Charter School Name: **Heritage Classical Academy**

*The Board Chair of the proposed sponsoring entity shall initial **all** assurances within this document to confirm awareness and understanding of responsibilities established herein.*

Initial by each blank line in blue ink

Open Meetings Requirements

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 will be held in a public forum as required by the Open Meetings Act in Government Code, Chapter 551.

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 that were proposed and approved in the application for charter.

Public Information Requirements

The proposed charter holder assures that information, that is considered public, requested by anyone will be provided in accordance with Government Code, Chapter 552.

Criminal History Check Requirements

The 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 a 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.

Annual Training Requirements

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.

Residential Facilities Monitoring (RFM) System

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 Residential Facilities (RFs). The charter holder further assures that it understands that it will be required to report data related to students with disabilities residing in RFs in TEA's data collection system known as RF Tracker and that it may be subject to RFM intervention activities and on-site visits based upon a review of the data it reports or on random or other means of selection.

Special RF Training

The 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.

Admission and Enrollment

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.

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.

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.

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.

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.

Public Meeting(s)

The proposed charter holder assures that a public meeting will be held, in accordance with the requirements outlined in Attachment E5 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.

Withdrawal and Expulsion

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.

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.

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).

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).

Ready to Open Check-List

The proposed charter holder understands, upon approval and award of charter, that a ready-to-open check list may be required to be completed prior to final approval for the opening of any campus.

Postponement of Opening

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.

Federal and State Funding

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.

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.

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.

Federal Charter School Program Grant

The applicant provides assurance that program funds will supplement (increase the level of service), and not supplant (replace) state mandates, Commissioner and State Board of Education rules, and activities previously conducted with state or local funds. The applicant provides assurance that state or local funds may not be decreased or diverted for other purposes merely because of the availability of these funds. The applicant provides assurance that program services and activities to be funded from this grant will be supplementary to existing services and activities and will not be used for any services or activities required by state law, State Board of Education rules, or local policy.

The applicant provides assurance that the application does not contain any information that would be protected by the Family Educational Rights and Privacy Act (FERPA) from general release to the public.

The applicant provides assurance to adhere to all Statutory Requirements, TEA Program Requirements, and Performance Measures, as noted in the Generation 26 Application for Charter, and shall provide the Texas Education Agency, upon request, any performance data necessary to assess the success of the Charter School Program (CSP) grant.

The applicant provides assurance that the chosen financial accounting system will adhere to the following requirements, upon award of a charter:

- accommodates the minimum 15-digit account code mandated by the FASRG;
- generates information needed for PEIMS reporting; and
- ensures adequate accountability of state and federal funds. If the applicant's financial accounting system is not approved by TEA, the applicant assures that it will budget and acquire an acceptable accounting system and training with CSP grant funds. Additionally, the applicant will be required to submit proof of an acceptable accounting system prior to receiving continued and/or additional funding.

The applicant provides assurance that it will maintain clear documentation and data for the school and students served by the CSP grant, will comply with any reporting and evaluation requirements that may be established by the TEA, and will submit the reports in the format and manner requested by TEA. Grantees will be required to cooperate with the team that has been contracted to evaluate the use of CSP grant funds.

The applicant provides assurance that it has, or will have before serving students, on file a certificate of occupancy or the equivalent, for the instructional facility. At any time, should the TEA Division of Charter School Authorizing and Administration request a copy, the applicant will provide such copy immediately.

According to Title IV, Part C of ESSA, to receive federal grant funds of any type, including U. S. Department of Education funds, the charter school must meet the definition of a charter school, as defined in ESSA, Section 4310(2). By signing and submitting the application, the authorized official of the proposed public charter school certifies that each of the statements in the definition is true and that the school is in compliance with this definition. A charter school is not eligible to receive any federal funds at any time, formula or discretionary, from TEA if it does not comply with this definition.

The term charter school means a public school that:

a. in accordance with TEC, Chapter 12, is exempt from significant State or local rules that inhibit the flexible operation and management of the school, but not from any rules relating to the other requirements of this section;

b. is created by a developer as a public school, or is adapted by a developer from an existing public school, and is operated under public supervision and direction;

c. operates in pursuit of a specific set of educational objectives determined by the school's developer and agreed to by the authorized public chartering agency;

d. provides a program of elementary or secondary education, or both;

e. is nonsectarian in its programs, admissions policies, employment practices, and all other operations, and is not affiliated with a sectarian school or religious institution;

f. does not charge tuition

g. complies with the Age Discrimination Act of 1975, 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 Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.), Section 444 of the General Education Provisions Act (20 U.S.C. 1232g) (commonly referred to as the "Family Educational Rights and Privacy Act of 1974"), and Part B of the Individuals with Disabilities Education Act;

h. is a school to which parents choose to send their children, and that admits students on the basis of a lottery, if more students apply for admission than can be accommodated;

i. agrees to comply with the same Federal and State audit requirements as do other elementary schools and secondary schools in the State, unless such requirements are specifically waived for the purposes of this program;

j. meets all applicable Federal, State, and local health and safety requirements;

k. operates in accordance with State law; and

l. has a written performance contract with the authorized public chartering agency in the State that includes a description of how student performance will be measured in charter schools pursuant to State assessments that are required of other schools and pursuant to any other assessments mutually agreeable to the authorized public charter agency and the charter school.

Required Disclosure

SG 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.

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.

STUART SAUNDERS

Printed Name of Sponsoring Entity Board Chair

Stuart Saunders

Signature of Sponsoring Entity Board Chair

1-17-21

Date

ADDENDUM
Charter School Program Start-Up Grant

Priority Point

☒ The applicant proposes to open the charter school in a Qualified Opportunity Zone.

The application scoring process will allow for the award of a priority point for applicants committed to serving students who will attend a school located in a Qualified Opportunity Zone. If awarded a charter, applicants committed to opening charter schools in a Qualified Opportunity Zone will be required to provide specific census tract numbers and other information on the plan to serve students in these high-need areas.

Narratives

EDUCATIONAL PLAN

1. **Describe the educational program of the proposed charter school.**
   HCA will provide a focused classical education to a diverse community of primary and secondary scholars by developing their knowledge to a state of wisdom and character to a state of virtue and by preparing them as well-educated, self-governing citizens and leaders for the next generation of America.

   HCA's education model is derived from the Hillsdale College's Barney Charter School Initiative (BCSI) classical education approach and TEA's Effective Schools framework (https://texasesf.org/framework/), as well as the Effective Schools Correlates developed by Larry Lezotte (*Re-Envisioning Effective Schools Correlates*, Lezotte and Snyder, 2016). HCA is collaborating with BCSI in the design and execution of its education model. Given BCSI's existing partnerships with more than 20 charter schools across the nation, its experts have developed and refined a rigorous program based on extensive research in each instructional area that meets the needs of diverse learners. Aligning the BCSI model with the TEA Effective Schools framework and Lezotte's Effective Schools correlates, HCA has developed key design elements for its proposed charter school:

   - Strong instructional leaders use a continuous improvement approach to plan effectively.

- Outstanding, well-supported, and well-trained teachers hold high expectations for ALL students.
- Effective data-driven instruction with frequent progress monitoring allows for differentiated instruction using multiple instructional modalities, such as the Socratic method of inquiry, helps all students achieve mastery of the essential knowledge and skills.
- An orderly and safe learning environment with a positive school culture promotes learning.
- A high-quality curriculum grounded in the classical liberal arts promotes critical thinking, the ability to discourse in a civil manner, and a love of learning.
- Systematic character development and opportunities for service prepare scholars for the best life possible for one's self and others.
- Positive home/school relations and parent engagement support student success.

To achieve its mission, HCA will emphasize an education in the humanities, science, and arts using evidence-based programs including: The Core Knowledge Sequence in science, history, art, music and health; Riggs Institute *The Writing & Spelling Road to Reading & Thinking*; and *Singapore Math* (a conceptual approach to mathematical skill building and problem solving). HCA will abide by all state laws regarding its special education (SPED) and English Learner (EL) populations and will employ the Multi-Tiered System of Support (MTSS) to scaffold instruction in math and reading for any struggling students, including ELs. HCA will hire a full-time Special Education Coordinator and an EL Specialist to ensure that our special populations will have the support they need to be successful. HCA plans to open with 192 students in grades K-1 begin only with grades K-1 to develop strong foundations in literacy and numeracy that will carry our scholars through their years of formal education. The ability to read well is vital to success in a classical education program.

HCA will be the *only* public school -- traditional and charter -- offering a classical education in Northwest Houston. In addition, HCA will offer several distinguishing innovations (adapted from the BCSI model application document):
1) HCA will have a strong emphasis on scientifically-based reading instruction including Riggs explicit phonics to ensure mastery of reading by third grade with partnerships as needed with the Neuhaus Center (working with students with dyslexia) and the UT Health Science Center Children's Learning Institute (providing training in the use of diagnostic assessments and scientifically-based reading instruction).
2) All students in grades four and five will be introduced to Latin roots which have been demonstrated to improve reading comprehension and vocabulary and to bolster performance in all subjects; formal study of Latin will begin in grade six.

3) Middle school students will study history mainly through primary source documents to foster analytical skills and essential insight into their culture and HCA.
4) All students will be trained in study skills, such as time management, organization, and note taking, that are essential for building stamina for further academic pursuits.
5) The program will consistently and directly teach, model, and give opportunities to students to practice the HCA seven core virtues of character.
6) A part-time science specialist will be employed, beginning with grades K and 1, and will conduct lab experiments, engaging students early to become interested in STEM fields.
7) HCA has a partnership with Houston Baptist University to provide student teachers and to co-develop a teacher training program in classical education to enable the scaling of these schools in Texas.
8) HCA will partner with APCQ to develop a continuous improvement model for instructional, financial, and operational planning and execution.

HCA is developing its curriculum and instructional approaches in collaboration with BCSI, mapping carefully the BSCI guidelines and curriculum recommendations with the Texas Essential Knowledge and Skills (TEKS). In addition to the academic programs listed above, HCA will offer co-curricular programs such as competitive sports teams in middle school, opportunities for community service, after school clubs such as robotics and theater, and opportunities to explore careers through internships in the middle school. HCA seeks to provide engaging programs to spark the interest and passions of its students as they journey to fill their potential.

ROLES AND RESPONSIBILITIES

2. **Describe the roles and responsibilities of charter school personnel, any partner organizations, and charter management organizations, as applicable, including the administrative and contractual roles and responsibilities of such partners**.

1) *HCA Board and Personnel*: The HCA Board's primary roles include: 1) setting school policies that support the mission and vision of the school and lead to a safe, secure environment and support student learning; 2) monitoring academic and performance metrics for a culturally relevant curriculum aligned with the TEKS; 3) approving all capital improvements and expenditures over an amount designated by the Board to ensure all financial expenses are aligned to the mission of serving students well; 4) hiring an outstanding CEO/Superintendent to execute the school's vision and mission and holding him or her accountable for achieving performance metrics; 5) compliance with all local, state, and federal regulations; 6) creating strategic plans that include 3- to 5-year financials; and 7) ensuring the financial

health of the school through policies and controls and raising funds if needed to support the budget.

The CEO/Superintendent is responsible for hiring, developing, evaluating, and dismissing as needed all school staff; enrolling students, developing the curriculum and instruction in accordance with Board policies and guidelines, and general operations. The Instructional Leadership Team in Year 1 includes a Lower School Principal, Special Education Coordinator, EL Specialist, two Master Teachers, two bilingual certified teachers, full-time counselor, half-time social worker, nurse, part-time IT Director, and a half-time Director of Enrollment and Community Engagement. The role of this team is to develop and implement the instructional program so that all of HCA's diverse learners achieve at high levels. The Financial Leadership in Year 1 consists of a CFO, a PEIMS Manager, and an Office Manager. The role of this team is to ensure the financial health of the school. In Year 1, this team will also oversee operations such as food service, transportation, facilities management, and security. A full-time Chief Operating Officer will be added in year 4; he or she will assume management of operations.

2) *Partnerships*: HCA is developing its curriculum and instructional approaches in collaboration with Hillsdale College's Barney Charter School Initiative (BCSI), mapping carefully all curriculum with the Texas Essential Knowledge and Skills (TEKS). BCSI is currently supporting more than 20 charter schools at no charge. HCA is the only school BCSI is partnering with that would open in 2022. Overall results in these schools based on 2017-18 data are strong, with 82% of the schools exceeding state averages on ELA proficiency and 52% exceeding state averages by 20% or more; and 64% exceeding state averages on Math Proficiency and 29% of the BCSI schools exceeding state Math proficiency averages by 10% or more. The partnership with BCSI provides board training, access to professional development, additional resources and a network for HCA to lean on. <u>There is no fee **f**or the association with BCSI and they do not maintain any fiduciary rights or responsibilities over the charter</u>. Additional partners include Houston Baptist University for student teachers; Neuhaus Center for dyslexia training; YMCA for after school programming; American Productivity and Quality Center (APQC) for support in process improvement; the Children's Learning Institute for training in scientifically-based reading and assessments; and Region IV ESC for training in special education and PEIMS management.

3. **INPUT FROM PARENTS AND COMMUNITY**

Describe how the eligible applicant will solicit and consider input from parents and other members of the community on the implementation of the school design and operation of the proposed charter school.

HCA will create a bank of contacts of parents who have shown an interest in the school and community leaders, church leaders, area chambers, area nonprofits, SBOE members, and state representatives. The plan outlined for engaging parents and community members from the application approval to school opening includes the following:

1) Bi-weekly updates on the progress of the school toward its opening emailed or mailed to interested parents and community members.
2) Parents will be invited to participate in the school's social media through blogs and posts.
3) Three open houses will be held about the school in October and early December 2021, and February 2022. Parents and community members will be invited to provide feedback on any updates presented.
4) Small meetings in the homes of parents who have committed to the school that will include prospective families. This will also be an opportunity for parents to provide input regarding school design including decisions like which specials classes will be offered in year one, dress code, and innovative transportation ideas.
5) Parents and community members will be invited to join the final interviews of key leadership positions including but not limited to the CFO and school principals.
6) Parents will be invited to help support the student recruitment process and enrollment events that occur in the start-up year while practicing social distancing if necessary due to COVID.
7) In Year 1, HCA will add a parent to the Board and also add parents to a curriculum audit committee that will ensure that the HCA curriculum is culturally relevant to our diverse students and promotes social and racial equity.

PARENT AND COMMUNITY ENGAGEMENT

4. **Describe how the eligible applicant will support the use of effective parent, family, and community engagement strategies to operate the proposed charter school.**

A genuine feeling of community with shared values, traditions, and respect for all members of the community is at the heart of a great school. It is the intent of the HCA Board to create a strong community from the time the charter application is approved throughout its many years of serving students and families.

HCA will create an inclusive, welcoming environment that engages all families in the life of the school and most importantly, in their student learning. HCA will post a sign in English and Spanish near the front of the school that will have a statement such as: "Parents are a child's most important teacher. We welcome you as partners and encourage you to be involved in your child's learning and the life of the school." Parents will have several opportunities for leadership in the school: 1) At the end of the first year, the Board will expand and add one or two parents to the Board; 2) The school will establish a Parent Forum with a leader elected by the parents to help organize educational events several times a year that will always have a translator for Spanish speaking families and that will provide feedback to the CEO/Superintendent and Board on issues that may arise; 3) Parents will be invited to lead, organize, and even invent some of the school's new signature traditions such as a book fair, international festival, Black History Month activities, Cinco de Mayo, and an art show.

HCA is a firm believer in systems and structure, and will establish the following strategies, many of them proven in other high performing schools, to encourage parents' support for learning and involvement:

1) Believing that relationships are the key to engagement, each HCA teacher will make a home visit to each of his/her students prior to the school year and maintain that relationship through proactive email and phone communication with the families throughout the year.

2) Teachers will encourage parents to volunteer in the classroom, call them on their cell phones if any issues arise, and participate in field lessons and school events. HCA will sponsor book nights, Saturday maker-space events, field days, and other events to encourage parent involvement.

All signage in the school will be in English and Spanish, all documents will be produced in English and Spanish, and the school will have at least one certified bilingual teacher in each grade K-3. HCA will also identify translators in any other languages of students enrolling in the school and make sure they are readily available as needed.

The Director of Enrollment and Community Outreach will be tasked with developing ties to community organizations where the school will be located, and organizing events to bring the community together, such as all school picnics, a speaker series, and potential school traditions such as a book fair and international festival that can engage a diverse community.

TRANPORTATION

5. **Describe the eligible applicant's plan for meeting the transportation needs of the**

students at the proposed charter school.

Given HCA's mission to serve ALL students, HCA will ensure that lack of transportation is not a barrier that prevents any student from enrolling and/or getting to school on time on a daily basis. HCA will achieve his through a myriad of creative solutions.

First, HCA will work with parents to assess the needs of all accepted students. HCA will be locating its facility in an area that has a large base of students and HCA team members will help families create safe walking routes for all students living within 1.0 miles of the school. HCA will also work with families to create carpool options for students living in close proximity with each other. For students who are older or can be accompanied by an adult, Metro Houston passes will be made available to ensure that cost is not a barrier. Lastly, HCA has budgeted enough funds for one van in year one for students for whom none of the aforementioned options are feasible. This expense ramps up to approximately 5 vans in year 5 to ensure that even as the school grows, transportation is accessible (see financial workbook, assumption tab, line 107).

Furthermore, HCA will work with local and national partners to further the development of creative transportation solutions. Partners that HCA has already begun conversations with include: Good Reason Houston (https://goodreasonhouston.org/) that is exploring transportation solutions for charter schools such as the use of an uber like app HopSkipDrive (https://www.hopskipdrive.com/); 4mativ (www.4mativ.org) that is a start-up organization providing comprehensive support to schools; and other Houston-based charter schools that would be willing to share transportation services and routes. HCA has also initiated conversations with two bus service companies, First Student Inc. and Goodman Bus Services, to determine pricing for various levels of student participation in HCA bus service. Students who elect to use any of the available transportation options will never be charged for this service.

Given its commitment to an inclusive school environment, HCA will provide bus service for all students with disabilities who choose to enroll in HCA in accordance with CFR 300.349 (c) (16) and has budgeted this within the $20,000 of transportation in year 1 (*see financial workbook, assumptions tab, line 107*).

STUDENT OUTCOME GOALS

6. **Identify three to five specific Student Outcome SMART Goals that will be achieved by the beginning of Year 3 (August 2024). Smart goals are Specific, Measurable, Attainable, Relevant, and Time-bound.**

Because HCA will not administer the STAAR test to its third-grade students until the end

of Year 3, we have selected goals that are indicators of preparation to do well on the STAAR test, as well as one goal related to social emotional learning and character development.

1) 90% of students will be developed in Reading on the TPRI or Acadience EOY assessments at the end of grades K, 1, and 2;
2) EL students will achieve 85% mastery on TELPAS at the end of grades K, 1, and 2.
3) Students will see an average of 0.6 score on the Panorama SEL survey as demonstration of social emotional learning and character development at the end of grades K, 1, and 2.
4) Students will demonstrate 25% annual growth from BOY to EOY on the NWEA MAP assessment at the end of grades 1 and 2.

USE OF EVALUATION DATA

7. **Describe how the board will use evaluation data to determine progress towards meeting the outcome goals and how it will use that data to modify the program(s). Include a preliminary timeline when updates on outcome goals will be reported to the board**.

HCA will create a dashboard that will allow the team to track the following student metrics to ensure that students are progressing, achieving proficiency in reading and English acquisition, developing strong character traits, and progressing in overall academic achievement in comparison to national norms.

1) TPRI and Acadience reading inventories for BOY, MOY and EOY will be used to evaluate SMART Goal 1;
2) TELPAS March administration will be used to track SMART Goal 2;
3) SEL Panorama beginning of the year and end of the year survey data will be used to track SMART Goal 3;
4) NWEA MAP BOY and EOY data will be used for SMART Goal 4.

HCA will monitor progress after each assessment administration, putting information into a dashboard that color codes student progress in green, yellow, and red so that struggling students can be readily identified, and appropriate interventions applied. These online reports will be available to the Board on an ongoing basis and will also be presented by the CEO/Superintendent at Board meetings throughout the year. The Board, and particularly the Education Committee in partnership with the Instructional Leadership Team, will analyze the data to determine trends that may indicate that changes to curriculum and instruction need to be made. If there are clear areas in which most students are demonstrating lack of mastery, immediate action to change a program may need to be taken.

GRANT-RELATED BUDGET

8. **Describe the eligible applicant's planned activities and expenditures of grant funds to open and prepare for the operation of the proposed charter school.**

CSP grant dollars enable HCA to have a strong start to their school year. With these funds, HCA can hire personnel beginning in year 0, have a strong planning process and then launch the school in start-up years with the necessary team, operations, and resources to ensure academic success.

Planning Phase: Year 0

Specifically, we are budgeting for all personnel that will be hired for year 1 to start in year 0, with the CEO/Superintendent starting one month after the charter hopefully is awarded (11 months of employment in year 0), and all the teachers starting 3 weeks before the school year begins for intensive PD. A Director of Enrollment and Community Engagement will be hired by January of 2023 to ensure that the school reaches its enrollment targets. Other personnel will start between 4-26 weeks before the school year begins. In this time, the personnel will undergo professional development in their field, they will collectively set the charter school culture, and they will prepare for the students to arrive. The total personnel cost in year 0 is $273,790 for the salaries plus taxes and benefits. For the CSP grant, we are requesting **$148,000** for salaries, taxes and benefits for Year 0 and **$5,000** for professional development.

Additionally, in year 0 during the planning process, focus will be placed on purchasing resources for teachers including supplies, textbooks, technology, and furniture. The total we will use from CSP dollars to focus on supplies and materials will be **$17,500**; the amount for equipment, furniture and technology is **$55,500**.

Given facilities is a challenge for schools that are approved, a portion of the CSP dollars will be retained in the planning year to ensure that any improvements required to bring a building up to code can be executed. The reserved budget for this is **$70,000** and no renovations that would materially improve the value of the building will be executed.

Total budgeted expenses for the start-up year, Year 0, are $606,902 and include occupancy costs of $201,267, $175,000 of which is tenant improvements to bring the facility up to code. The requested CSP grant allocation in year 0 is **$300,000**, close to half of the budgeted expense for Year 0. In addition, with documented $315,000 in start-up grant dollars from Saunders Foundation coming in year 0 (see **Attachment 33** pp. 482-494 in the HCA GEN 26 application) on top of the federal CSP grant, expenses that are not allowable under CSP will be able to be coded to the private grant.

Implementation: Years 1 and 2.

HCA has similar priorities for the implementation years, to those in Year 0: excellent staff and faculty; student and staff recruitment and professional development; classroom supplies and instructional materials; furniture and technology; and tenant improvements. HCA is dedicated to financial transparency and is thus hiring a CFO in Year 1. CSP dollars will reinforce the CFO's salary so that high quality talent can be hired for this position. Furthermore, HCA is supporting classrooms with teacher aides to ensure that all students, especially EL and SPED students, will thrive at the school. Additional personnel dollars will go to support the principal, directors/coordinators, office manager and custodial staff.

Another priority for the implementation of the CSP grant is to ensure that all contracted services to help with back officer supports and recruitment are of quality. CSP dollars are hence requested to support accounting, payroll, insurance along with student and staff recruitment and professional development/staff travel (as deemed safe).

Finally, the remainder of the implementation dollars will continue to support high quality teaching and learning through the forms of supplies and materials while ensuring that the operations of the facility are running smoothly and create positive learning environments.

The following details the requested funds for the implantation years of the grant:

- Salaries and benefits for the CEO, Principal, CFO, Special Education Coordinator, ESL Specialist and Director of Enrollment/Community Outreach, Office Manager, teachers and aides, and a custodian totaling **$178,458** in salaries, taxes and benefits.
- Student and staff recruitment and PD totaling **$36,500**.
- **$79,500** allocated for classroom furniture, instructional materials and equipment, and technology.
- Tenant improvements; two months' rent and utilities; property and liability insurance, telephone services, and office expenses totaling **$172,267**.
- Additional expenses include accounting ($2400), payroll services ($5,300) and D&O insurance ($575) totaling **$8,275**.

While if necessary, the board could make the needed adjustments to ensure that during years 1 and 2, HCA remains financially sustainable without this grant, the supplement of the $475,000 ensures that HCA can execute on the developed model to its full extent giving the school the sufficient resources it needs to ensure an equitable and high qualityeducation for students.

9. **List all allowable grant-related activities for which the applicant is requesting grant funds in the table below. Include the amounts budgeted for each activity.**

Group similar activities and costs together under the appropriate heading. During negotiation, the applicant will be required to budget planned expenditures on a separate attachment provided by TEA.

Note: Applicants may delete directions within each row to input responses. Hover the cursor over the bottom left corner of each row and press the [+] button to insert additional rows.

COST AREA	PLANNING ACTIVITY BUDGET	IMPLEMENTATION ACTIVITY BUDGET
PAYROLL		
• Superintendent	$100,000	$50,000
• Principal	$5,000	$7,000
• Deans, Directors, & Coordinators	$21,000	$22,000
• CFO		$50,000
• Office manager		$20,000
• Teachers and aides		$24,458
• Custodian		$5,000
• Payroll taxes and benefits	$22,000	
PROFESSIONAL AND CONTRACTED SERVICES		
• Accounting services setting up the books and beginning to code expenses	$2,400	$2,400
• Payroll services		$5,300
• D&O Insurance		$575
• Student recruitment/marketing	$10,000	$15,000
• Staff recruitment/Marketing	$5,000	$15,000
• Professional development for staff	$5,000	$5,000
• Travel for staff recruitment and/or professional development		$1,500
SUPPLIES AND MATERIALS		
• Classroom supplies and materials	$7,500	$30,000
• Textbooks/workbooks	$10,000	$25,000
• Equipment/furniture for classrooms and	$38,000	$20,000

office		
• Technology equipment	$4,100	$4,500
OTHER OPERATING COSTS		
• Tenant Improvements not included in rent (and allowable under CSP to bring a facility up to E-occupancy)	$70,000	$125,000
• Rent, utilities, internet		$38,100
• Property and Liability insurance		$3,167
• Telephone and cell phone service		$3,000
• Office expenses		$3,000
CAPITAL OUTLAY		
Total Planning Costs		$300,000
Total Implementation Costs		$475,000
Total Planning + Implementation Costs		$775,000

10. **Describe how the eligible applicant will maintain financial sustainability after the end of the grant period.**

The $1.023 million in grants and pledges from Saunders Foundation and other board members in years 0-4 allow Heritage Classical Academy Charter to ensure the school has a strong financial foundation even though the charter school is starting with just two grade levels and growing one grade per year (except when we add PreK and grow two grades per year). We have budgeted for all philanthropy to be allocated by year 4 and $0 in philanthropy in year 5. In that year 5, the school will have grown from PreK3 - 5th grade with 756 students. At that size, and without any philanthropic support, the charter school budget still has a net operating income of $59,122, and that is after a 2% contingency allocation. CSP and Saunders Foundation start up support allow the school to spend more dollars during these start up years than it would have been able to spend otherwise, but the spending is not lavish; it simply contemplates an accelerated schedule for staff and supplies, thereby making year 5 and beyond sustainable without these grant dollars as the student enrollment catches up to the budget.

Attachments

- CSP1: Equitable Access and Participation
- CSP2: Charter Management Receipt of Funds

Evaluation criteria

A strong response will:

- ✓ Present a clear and robust educational program for the proposed charter school.
- ✓ Describe specific roles and responsibilities of charter school personnel, any partner organizations, and charter management organizations, as applicable, including the administrative and contractual roles and responsibilities of such partners.
- ✓ Present clear and strong plans to solicit and consider input from parents and other members of the community on the implementation and operation of the proposed charter school.
- ✓ Present clear and robust plans to support the use of effective parent, family, and community engagement strategies to operate the proposed charter school.
- ✓ Present clear and viable plans to meet the transportation needs of the students at the proposed charter school.
- ✓ Identify at least three specific, measurable, attainable, relevant, and time-bound student outcome goals that will be reached by the beginning of Year 3 of operations.
- ✓ Present realistic and viable plans to evaluate data to determine progress towards meeting the outcome goals and how it will use that data to modify the program(s) - Include a preliminary timeline when updates on outcome goals will be reported to the board.
- ✓ Present allowable activities that are appropriate for the results expected.
- ✓ Identify personnel, materials and other identified expenses that support the outlined activities.
- ✓ Present funds that are reasonable and necessary for achieving the objectives.
- ✓ Present a clear plan to maintain financial sustainability after the end of the grant.

ATTACHMENT CSP1
Equitable Access and Participation

Check the appropriate box below to indicate whether any barriers are foreseeable to equitable access and participation for any groups that will receive services funded by this federal grant.

☒ The applicant assures that **no barriers** are likely to exist to equitable access and participation for any groups receiving services funded by this grant.

☐ The applicant **foresees barriers** to equitable access and participation for the following
groups that would receive services funded by this grant, as described below.

	BARRIERS	EFFECTED GROUPS
☐	Gender-Specific Bias	
☐	Cultural, Linguistic, or Economic Diversity	
☐	Gang-Related Activities	
☐	Drug-Related Activities	
☐	Visual Impairments	
☐	Hearing Impairments	
☐	Learning Disabilities	
☐	Other Physical Disabilities or Constraints	
☐	Inaccessible Physical Structures	
☐	Absenteeism/Truancy	
☐	High Mobility Rates	
☐	Lack of Support from Parents	
☐	Shortage of Qualified Personnel	
☐	Lack of Knowledge Regarding Program Benefits	
☐	Lack of Transportation to Program Activities	
☐	Other Barriers	

ATTACHMENT CSP2
Charter Management Organization Receipt of Funds

A Charter Management Organization (CMO) is defined as a nonprofit organization that operates or manages a network of charter schools linked by centralized support, operations, and oversight.

Check the appropriate box.

☒ The applicant is NOT affiliated with nor proposing to contract with a CMO. Skip this attachment.

☐ The applicant IS affiliated with or proposing to contract with a CMO.

If yes, check all that apply below and provide the following documentation:

☐ The CMO does not currently receive or will not receive CSP funds directly from the United States Department of Education. **No further documentation is needed.**

☐ The CMO currently receives CSP funds directly from the United States Department of Education. **Provide the Grant Award Notification Number (GAN#) associated with this CSP grant.**

☐ The CMO will receive CSP funds directly from the United States Department of Education. **Provide a description of the anticipated timeline of award, charter school campuses (including the states in which they will operate) that will benefit from the grant if awarded, and the anticipated award amount.**

☐ Other. **Provide a thorough explanation.**

Insert Material Behind this Page.
Also Include this Cover Page with Submission