



F.A.M.E., Inc.

## Board Meeting

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### Date and Time

Saturday May 30, 2020 at 10:00 AM CDT

### Location

428 Broadway Street, New Orleans, LA 70118, Cafeteria

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Topic: FAME Board Meeting

Time: May 30, 2020 10:00 AM Central Time (US and Canada)

Join Zoom Meeting

<https://zoom.us/j/99809502582?pwd=ditzaE02a1pRaTQzbVhOenRodldKQT09>

Meeting ID: 998 0950 2582

Password: 203588

One tap mobile

+13017158592,,99809502582#,1#,203588# US (Germantown)

+13126266799,,99809502582#,1#,203588# US (Chicago)

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### Agenda

#### I. Opening Items

Opening Items

**A. Call the Meeting to Order**

**B. Record Attendance and Guests**

**C. Approve Minutes**

It is recommended that the board approve the minutes from the April 25, 2020 meeting with any suggested modifications or changes.

Approve minutes for Board Meeting on April 25, 2020

**II. Finance Committee**

Finance Committee

**A. Policy on IT Procedures**

The Finance Committee recommends that the board approve the Policy on IT Procedures as presented with any suggested modifications and revisions.

**B. Form 990 (Fiscal Year June 2019)**

The Finance Committee recommends that the board approve the presented Form 990 for the fiscal year ended June 2019.

**C. 2020-2021 Operating Budget Draft Review**

The CFO will share an initial draft of the 2020-2021 operating budget for informational purposes. The Formal Budget Presentation and Final Budget Adoption will take place in July.

**D. Contract Approval**

The Administration recommends the approval of a contract with Young Audiences in the amount of \$87,457.50 as outlined in the attached document to continue to provide Arts education and after school programming to Audubon Gentilly for the 2020-2021 school year.

**E. Financial Statement April 2020**

Review the April 2020 Financial Statements of Audubon Schools

**III. Other Business**

**A. Strategic Plan Draft Review**

The Administration will present a draft of the strategic plan prepared through our work with Bellwether Education Partners.

**B. CEO Search Committee Update**

The CEO Search Committee will provide an update on the CEO Search Process.

**IV. CEO's Report**

- A.** Academic Report
- B.** Training Center Update
- C.** Operations Report
- D.** Development Report
- E.** Parent Reports

**V. Closing Items**

- A.** Announcements

The next meeting of the FAME Board will take place on Saturday, June 20, 2020 beginning at 10 am. More information regarding this meeting will be sent out at a later time.

- B.** Adjourn Meeting

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All non-FAME board or staff attendees are asked to ensure that their microphones remain on mute for the duration of this call. If any attendee would like to make a public comment, please do so using the chat function provided in the Zoom Meeting tool.

# Coversheet

## Approve Minutes

<b>Section:</b>	I. Opening Items
<b>Item:</b>	C. Approve Minutes
<b>Purpose:</b>	Approve Minutes
<b>Submitted by:</b>	
<b>Related Material:</b>	Minutes for Board Meeting on April 25, 2020

APPROVED



## F.A.M.E., Inc.

### Minutes

#### Board Meeting

Virtual Board Meeting

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#### Date and Time

Saturday April 25, 2020 at 10:00 AM

#### Location

Topic: April FAME Board Meeting

Time: Apr 25, 2020 10:00 AM Central Time (US and Canada)

Join Zoom Meeting

<https://zoom.us/j/97796248839?pwd=Nk0wZ0gxTFILSFJvcXMzNXhueG5CQT09>

Meeting ID: 977 9624 8839

Password: 686250

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#### Directors Present

C. Lawson (remote), C. Lebas (remote), D. Omojola (remote), J. Jalice (remote), M. Russell (remote), R. Fernandez (remote), R. Kirschman (remote), T. Lasher (remote)

#### Directors Absent

B. Connick, C. Tregre, L. Moran

#### Ex Officio Members Present

L. Brown (remote)

#### Non Voting Members Present

L. Brown (remote)

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## **Guests Present**

A. Collopy (remote), A. Dupre (remote), D. LaViscount (remote), J. Anderson (remote), L. Spearman (remote), L. Vermeulen (remote), M. Butler (remote), M. Forcier (remote)

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## **I. Opening Items**

### **A. Call the Meeting to Order**

J. Jalice called a meeting of the board of directors of F.A.M.E., Inc. to order on Saturday Apr 25, 2020 at 10:20 AM.

### **B. Record Attendance and Guests**

### **C. Approve Minutes**

R. Kirschman made a motion to approve the minutes from February 15, 2020 Board Meeting on 02-15-20.

T. Lasher seconded the motion.

The board **VOTED** unanimously to approve the motion.

## **II. Finance Committee**

### **A. Financial Statements February and March 2020**

### **B. Contract Approval**

J. Jalice made a motion to approve the contract with Ulimite Pro Software to provide payroll vendor service.

C. Lebas seconded the motion.

The board **VOTED** unanimously to approve the motion.

### **C. SBA Payroll Protection Program Forgivable Loan**

R. Kirschman made a motion to approve the acceptance and use of the PPP funds for school operational needs.

J. Jalice seconded the motion.

The board **VOTED** unanimously to approve the motion.

### **D. Transportation RFP for 2020-2021 School Year**

### **E. School Lunch Vendor RFP 2020-2021 School Year**

## **III. Other Business**

### **A. 2020-2021 School Year Calendar Amendment**

R. Kirschman made a motion to approve the 2020-2021 calendar amendment.

T. Lasher seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **B. Addendum to 2019-2020 Pupil Progression Plan**

R. Kirschman made a motion to accept the 2019-2020 Pupil Progression Plan amendment as presented.

C. Lebas seconded the motion.

The board **VOTED** unanimously to approve the motion.

### **IV. Closing Items**

#### **A. Announcements**

#### **B. Adjourn Meeting**

R. Kirschman made a motion to adjourn the meeting.

T. Lasher seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 12:04 PM.

Respectfully Submitted,

L. Brown

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All non-FAME board or staff attendees are asked to ensure that their microphones remain on mute for the duration of this call. If any attendee would like to make a public comment, please do so using the chat function provided in the Zoom Meeting tool.

# Coversheet

## Form 990 (Fiscal Year June 2019)

<b>Section:</b>	II. Finance Committee
<b>Item:</b>	B. Form 990 (Fiscal Year June 2019)
<b>Purpose:</b>	Vote
<b>Submitted by:</b>	
<b>Related Material:</b>	Draft Form 990-Audubon.PDF



**Caution:** Forms printed from within Adobe Acrobat may not meet IRS or state taxing agency specifications. When using Acrobat, select the "Actual Size" in the Adobe "Print" dialog.

CLIENT'S COPY

DRAFT

LAPORTE CPAS & BUSINESS ADVISORS  
5100 VILLAGE WALK, SUITE 300  
COVINGTON, LA 70433

MAY 12, 2020

FRENCH AND MONTESSORI EDUCATION INC.  
DBA AUDUBON CHARTER SCHOOL  
428 BROADWAY STREET  
NEW ORLEANS, LA 70118  
ATTENTION: JUSTIN ANDERSON

DEAR JUSTIN,

ENCLOSED IS THE ORGANIZATION'S 2018 EXEMPT ORGANIZATION  
RETURN.

SPECIFIC FILING INSTRUCTIONS ARE AS FOLLOWS.

FORM 990 RETURN:

THIS RETURN HAS BEEN PREPARED FOR ELECTRONIC FILING. IF YOU  
WISH TO HAVE IT TRANSMITTED ELECTRONICALLY TO THE IRS, PLEASE  
SIGN, DATE, AND RETURN FORM 8879-EO TO OUR OFFICE. WE WILL  
THEN SUBMIT THE ELECTRONIC RETURN TO THE IRS. DO NOT MAIL A  
PAPER COPY OF THE RETURN TO THE IRS.

PLEASE REVIEW THE RETURN FOR COMPLETENESS AND ACCURACY.

WE SINCERELY APPRECIATE THE OPPORTUNITY TO SERVE YOU. PLEASE  
CONTACT US IF YOU HAVE ANY QUESTIONS CONCERNING THE TAX  
RETURN.

A COPY OF THE RETURN IS ENCLOSED FOR YOUR FILES. WE SUGGEST  
THAT YOU RETAIN THIS COPY INDEFINITELY.

SINCERELY,

CODY GUTTIERREZ, CPA  
SENIOR MANAGER

**TAX RETURN FILING INSTRUCTIONS**

FORM 990

**FOR THE YEAR ENDING****JUNE 30, 2019**

<b>Prepared for</b>	FRENCH AND MONTESSORI EDUCATION INC. DBA AUDUBON CHARTER SCHOOL 428 BROADWAY STREET NEW ORLEANS, LA 70118
<b>Prepared by</b>	LAPORTE, APAC 5100 VILLAGE WALK, SUITE 300 COVINGTON, LA 70433
<b>Amount due or refund</b>	NOT APPLICABLE
<b>Make check payable to</b>	NOT APPLICABLE
<b>Mail tax return and check (if applicable) to</b>	NOT APPLICABLE
<b>Return must be mailed on or before</b>	NOT APPLICABLE
<b>Special Instructions</b>	THIS RETURN HAS BEEN PREPARED FOR ELECTRONIC FILING. IF YOU WISH TO HAVE IT TRANSMITTED ELECTRONICALLY TO THE IRS, PLEASE SIGN, DATE, AND RETURN FORM 8879-EO TO OUR OFFICE. WE WILL THEN SUBMIT THE ELECTRONIC RETURN TO THE IRS. DO NOT MAIL A PAPER COPY OF THE RETURN TO THE IRS.

Form **8879-EO****IRS e-file Signature Authorization  
for an Exempt Organization**

OMB No. 1545-1878

For calendar year 2018, or fiscal year beginning JUL 1, 2018, and ending JUN 30, 2019**2018**Department of the Treasury  
Internal Revenue Service▶ **Do not send to the IRS. Keep for your records.**  
▶ **Go to [www.irs.gov/Form8879EO](http://www.irs.gov/Form8879EO) for the latest information.**

Name of exempt organization

**FRENCH AND MONTESSORI EDUCATION INC.  
DBA AUDUBON CHARTER SCHOOL**

Employer identification number

**\*\* - \*\*\*4026**

Name and title of officer

**JAVIER JALICE  
BOARD CHAIR****Part I Type of Return and Return Information** (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line **1a**, **2a**, **3a**, **4a**, or **5a**, below, and the amount on that line for the return being filed with this form was blank, then leave line **1b**, **2b**, **3b**, **4b**, or **5b**, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than one line in Part I.

<b>1a</b> Form 990 check here ▶ <input checked="" type="checkbox"/>	<b>b Total revenue</b> , if any (Form 990, Part VIII, column (A), line 12) .....	<b>1b</b> <u>11,427,567.</u>
<b>2a</b> Form 990-EZ check here ▶ <input type="checkbox"/>	<b>b Total revenue</b> , if any (Form 990-EZ, line 9) .....	<b>2b</b> _____
<b>3a</b> Form 1120-POL check here ▶ <input type="checkbox"/>	<b>b Total tax</b> (Form 1120-POL, line 22) .....	<b>3b</b> _____
<b>4a</b> Form 990-PF check here ▶ <input type="checkbox"/>	<b>b Tax based on investment income</b> (Form 990-PF, Part VI, line 5) .....	<b>4b</b> _____
<b>5a</b> Form 8868 check here ▶ <input type="checkbox"/>	<b>b Balance Due</b> (Form 8868, line 3c) .....	<b>5b</b> _____

**Part II Declaration and Signature Authorization of Officer**

Under penalties of perjury, I declare that I am an officer of the above organization and that I have examined a copy of the organization's 2018 electronic return and accompanying schedules and statements and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the organization's electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the organization's return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the organization's federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the organization's electronic return and, if applicable, the organization's consent to electronic funds withdrawal.

Officer's PIN: check one box only

☒ I authorize LAPORTE, APAC

ERO firm name

to enter my PIN 00854Enter five numbers, but  
do not enter all zeros

as my signature on the organization's tax year 2018 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

☐ As an officer of the organization, I will enter my PIN as my signature on the organization's tax year 2018 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Officer's signature ▶ \_\_\_\_\_ Date ▶ \_\_\_\_\_

**Part III Certification and Authentication**

**ERO's EFIN/PIN.** Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

72583970005

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2018 electronically filed return for the organization indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ \_\_\_\_\_ Date ▶ \_\_\_\_\_

**ERO Must Retain This Form - See Instructions**  
**Do Not Submit This Form to the IRS Unless Requested To Do So**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8879-EO** (2018)

823051 10-26-18

15250512 755639 00854

2018 05000 FRENCH AND MONTESSORI EDUCA 00854\_\_2 12 of 111

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Form **990**Department of the Treasury  
Internal Revenue Service**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2018**Open to Public  
Inspection**A** For the 2018 calendar year, or tax year beginning **JUL 1, 2018** and ending **JUN 30, 2019****B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return/terminated  
☐ Amended return  
☐ Application pending

**C** Name of organization  
**FRENCH AND MONTESSORI EDUCATION INC.  
DBA AUDUBON CHARTER SCHOOL**

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) Room/suite  
**428 BROADWAY STREET**City or town, state or province, country, and ZIP or foreign postal code  
**NEW ORLEANS, LA 70118****F** Name and address of principal officer: **JAVIER JALICE  
SAME AS C ABOVE****D** Employer identification number**\*\* - \*\*\*4026****E** Telephone number  
**(504) 324-7103****G** Gross receipts \$ **11,797,502.****H(a)** Is this a group return for subordinates? ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No  
If "No," attach a list. (see instructions)**H(c)** Group exemption number ▶**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: ▶ **WWW.AUDUBONCHARTER.COM****K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of formation: **2005** **M** State of legal domicile: **LA****Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b>	Briefly describe the organization's mission or most significant activities: <b>SCHOOL PROVIDING MONTESSORI AND FRENCH EDUCATION FOR STUDENTS IN GRADES PRE-KINDERGARTEN THROUGH 8TH</b>
	<b>2</b>	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.
	<b>3</b>	Number of voting members of the governing body (Part VI, line 1a) <b>13</b>
	<b>4</b>	Number of independent voting members of the governing body (Part VI, line 1b) <b>13</b>
	<b>5</b>	Total number of individuals employed in calendar year 2018 (Part V, line 2a) <b>231</b>
	<b>6</b>	Total number of volunteers (estimate if necessary) <b>500</b>
	<b>7a</b>	Total unrelated business revenue from Part VIII, column (C), line 12 <b>0.</b>
<b>7b</b>	Net unrelated business taxable income from Form 990-T, line 38 <b>0.</b>	
<b>Revenue</b>	<b>8</b>	Contributions and grants (Part VIII, line 1h) <b>11,016,460.</b>
	<b>9</b>	Program service revenue (Part VIII, line 2g) <b>557,857.</b>
	<b>10</b>	Investment income (Part VIII, column (A), lines 3, 4, and 7d) <b>132,459.</b>
	<b>11</b>	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) <b>18,095.</b>
	<b>12</b>	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) <b>11,724,871.</b>
<b>Expenses</b>	<b>13</b>	Grants and similar amounts paid (Part IX, column (A), lines 1-3) <b>0.</b>
	<b>14</b>	Benefits paid to or for members (Part IX, column (A), line 4) <b>0.</b>
	<b>15</b>	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) <b>8,263,536.</b>
	<b>16a</b>	Professional fundraising fees (Part IX, column (A), line 11e) <b>0.</b>
	<b>b</b>	Total fundraising expenses (Part IX, column (D), line 25) <b>0.</b>
	<b>17</b>	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) <b>2,549,751.</b>
	<b>18</b>	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) <b>10,813,287.</b>
<b>19</b>	Revenue less expenses. Subtract line 18 from line 12 <b>911,584.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b>	Total assets (Part X, line 16) <b>6,794,725.</b>
	<b>21</b>	Total liabilities (Part X, line 26) <b>255,004.</b>
	<b>22</b>	Net assets or fund balances. Subtract line 21 from line 20 <b>6,539,721.</b>

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer		Date
	<b>JAVIER JALICE, BOARD CHAIR</b>		
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date
	<b>STEVEN C. GUTTIERREZ, CPA</b>		
	Firm's name ▶ <b>LAPORTE, APAC</b>	Firm's EIN ▶ <b>** - ***8864</b>	PTIN <b>P01467416</b>
	Firm's address ▶ <b>5100 VILLAGE WALK, SUITE 300 COVINGTON, LA 70433</b>	Phone no. <b>985-892-5850</b>	

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

## FRENCH AND MONTESSORI EDUCATION INC.

DBA AUDUBON CHARTER SCHOOL

\*\*-\*\*\*4026 Page 2

Form 990 (2018)

**Part III Statement of Program Service Accomplishments**Check if Schedule O contains a response or note to any line in this Part III ☐

- 1** Briefly describe the organization's mission:  
**AUDUBON CHARTER SCHOOL IS DEDICATED TO THE DEVELOPMENT OF CREATIVE, CONSTRUCTIVE AND DISCIPLINED LEARNERS. THIS OBJECTIVE IS ACHIEVED THROUGH UNIQUELY INNOVATIVE EDUCATIONAL PROGRAMS.**
- 2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No  
 If "Yes," describe these new services on Schedule O.
- 3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No  
 If "Yes," describe these changes on Schedule O.
- 4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.
- 4a** (Code: ) (Expenses \$ **12,052,659.** including grants of \$ ) (Revenue \$ **742,940.**)  
**WITH ITS MONTESSORI AND FRENCH PROGRAMS, AUDUBON CHARTER SCHOOL HAS CREATED AN ADVANCED LEARNING ENVIRONMENT DRIVEN BY CURRICULA DESIGNED TO DRAW HIGHLY-MOTIVATED, HIGH-ACHIEVING STUDENTS. AUDUBON CHARTER SCHOOL TEACHES PRE-KINDERGARTEN THROUGH 8TH GRADE. 1020 STUDENTS ATTENDED DURING THE 2018 - 2019 SCHOOL YEAR.**
- 4b** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )
- 4c** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )
- 4d** Other program services (Describe in Schedule O.)  
 (Expenses \$ including grants of \$ ) (Revenue \$ )
- 4e** Total program service expenses **12,052,659.**

Form **990** (2018)

## FRENCH AND MONTESSORI EDUCATION INC.

DBA AUDUBON CHARTER SCHOOL

\*\* - \*\*\*4026 Page 3

Form 990 (2018)

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
b Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	X	
c Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X



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**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III		X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J		X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		X
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?	X	

Note. All Form 990 filers are required to complete Schedule O

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
<b>1a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
<b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	



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**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
<b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return .....	<b>2a</b> 231		
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns? .....	<b>2b</b>	X	
<b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) .....			
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? .....	<b>3a</b>		X
<b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O .....	<b>3b</b>		
<b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? .....	<b>4a</b>		X
<b>b</b> If "Yes," enter the name of the foreign country: ▶ .....			
See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? .....	<b>5a</b>		X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? .....	<b>5b</b>		X
<b>c</b> If "Yes" to line 5a or 5b, did the organization file Form 8886-T? .....	<b>5c</b>		
<b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? .....	<b>6a</b>		X
<b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? .....	<b>6b</b>		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>			
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? .....	<b>7a</b>		X
<b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided? .....	<b>7b</b>		
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? .....	<b>7c</b>		X
<b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year .....	<b>7d</b>		
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? .....	<b>7e</b>		X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? .....	<b>7f</b>		X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? .....	<b>7g</b>		
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? .....	<b>7h</b>		
<b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? .....	<b>8</b>		
<b>9 Sponsoring organizations maintaining donor advised funds.</b>			
<b>a</b> Did the sponsoring organization make any taxable distributions under section 4966? .....	<b>9a</b>		
<b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? .....	<b>9b</b>		
<b>10 Section 501(c)(7) organizations.</b> Enter:			
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12 .....	<b>10a</b>		
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities .....	<b>10b</b>		
<b>11 Section 501(c)(12) organizations.</b> Enter:			
<b>a</b> Gross income from members or shareholders .....	<b>11a</b>		
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) .....	<b>11b</b>		
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041? .....	<b>12a</b>		
<b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year .....	<b>12b</b>		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>			
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state? .....	<b>13a</b>		
<b>Note.</b> See the instructions for additional information the organization must report on Schedule O.			
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans .....	<b>13b</b>		
<b>c</b> Enter the amount of reserves on hand .....	<b>13c</b>		
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year? .....	<b>14a</b>		X
<b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O .....	<b>14b</b>		
<b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? .....	<b>15</b>		X
If "Yes," see instructions and file Form 4720, Schedule N.			
<b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income? .....	<b>16</b>		X
If "Yes," complete Form 4720, Schedule O.			

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**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

☒**Section A. Governing Body and Management**

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year ..... <b>1a</b> 13 If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
<b>b</b> Enter the number of voting members included in line 1a, above, who are independent ..... <b>1b</b> 13		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? ..... <b>2</b>		X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? ..... <b>3</b>		X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? ..... <b>4</b>		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? ..... <b>5</b>		X
<b>6</b> Did the organization have members or stockholders? ..... <b>6</b>		X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? ..... <b>7a</b>		X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? ..... <b>7b</b>		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body? ..... <b>8a</b>	X	
<b>b</b> Each committee with authority to act on behalf of the governing body? ..... <b>8b</b>	X	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O ..... <b>9</b>		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates? ..... <b>10a</b>		X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? ..... <b>10b</b>		
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? ..... <b>11a</b>	X	
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13 ..... <b>12a</b>	X	
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? ..... <b>12b</b>	X	
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done ..... <b>12c</b>	X	
<b>13</b> Did the organization have a written whistleblower policy? ..... <b>13</b>	X	
<b>14</b> Did the organization have a written document retention and destruction policy? ..... <b>14</b>	X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official ..... <b>15a</b>	X	
<b>b</b> Other officers or key employees of the organization ..... <b>15b</b>	X	
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? ..... <b>16a</b>		X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? ..... <b>16b</b>		

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed ► **NONE**

**18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☒ Own website    ☐ Another's website    ☒ Upon request    ☐ Other (explain in Schedule O)

**19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records ►  
**JUSTIN C. ANDERSON - (504) 274-1952**  
**428 BROADWAY STREET, NEW ORLEANS, LA 70118**

## FRENCH AND MONTESSORI EDUCATION INC.

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**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) JAVIER JALICE CHAIRPERSON	0.50	X		X				0.	0.	0.
(2) BRENDAN CONNICK VICE-CHAIRPERSON	0.50	X		X				0.	0.	0.
(3) CALVIN TREGRE TREASURER	0.50	X		X				0.	0.	0.
(4) DORCAS OMAJOLA SECRETARY	0.50	X		X				0.	0.	0.
(5) DANIEL HELD MEMBER	0.50	X						0.	0.	0.
(6) DEREK BARDELL MEMBER	0.50	X						0.	0.	0.
(7) MELISSA RUSSELL MEMBER	0.50	X						0.	0.	0.
(8) RACHEL VAN VORHEES KIRSCHMAN MEMBER	0.50	X						0.	0.	0.
(9) RAMONA FERNANDEZ MEMBER	0.50	X						0.	0.	0.
(10) CLAIR LEBAS MEMBER	0.50	X						0.	0.	0.
(11) LOURDES MORAN MEMBER	0.50	X						0.	0.	0.
(12) THOMAS LASHER MEMBER	0.50	X						0.	0.	0.
(13) VINCENT SCIAMA MEMBER	0.50	X						0.	0.	0.
(14) LATOYE BROWN CEO	50.00			X				111,335.	0.	30,073.
(15) JUSTIN ANDERSON DIRECTOR OF FINANCE	50.00			X				75,003.	0.	20,679.



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**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns .....	<b>1a</b>					
	<b>b</b> Membership dues .....	<b>1b</b>					
	<b>c</b> Fundraising events .....	<b>1c</b>					
	<b>d</b> Related organizations .....	<b>1d</b>					
	<b>e</b> Government grants (contributions) .....	<b>1e</b>	10,414,570.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above .....	<b>1f</b>	152,870.				
	<b>g</b> Noncash contributions included in lines 1a-1f: \$ .....						
	<b>h Total.</b> Add lines 1a-1f .....			10,567,440.			
<b>Program Service Revenue</b>	<b>2 a</b> STUDENT ACTIVITY PROGRAMS .....	<b>Business Code</b>	611710	371,166.	371,166.		
	<b>b</b> TUITION REVENUE .....		611710	204,481.	204,481.		
	<b>c</b> AFTER SCHOOL CARE .....		611710	101,583.	101,583.		
	<b>d</b> SCHOOL FOOD PROGRAM .....		611710	62,566.	62,566.		
	<b>e</b> .....						
	<b>f</b> All other program service revenue .....						
	<b>g Total.</b> Add lines 2a-2f .....			739,796.			
	<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....			40,254.		
<b>4</b> Income from investment of tax-exempt bond proceeds .....							
<b>5</b> Royalties .....							
<b>6 a</b> Gross rents .....		(i) Real	(ii) Personal				
<b>b</b> Less: rental expenses .....							
<b>c</b> Rental income or (loss) .....							
<b>d</b> Net rental income or (loss) .....							
<b>7 a</b> Gross amount from sales of assets other than inventory .....		(i) Securities	(ii) Other				
<b>b</b> Less: cost or other basis and sales expenses .....							
<b>c</b> Gain or (loss) .....							
<b>d</b> Net gain or (loss) .....				45,418.			45,418.
<b>8 a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 .....		<b>a</b>	50,430.				
<b>b</b> Less: direct expenses .....		<b>b</b>	18,915.				
<b>c</b> Net income or (loss) from fundraising events .....				31,515.			31,515.
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....		<b>a</b>					
<b>b</b> Less: direct expenses .....		<b>b</b>					
<b>c</b> Net income or (loss) from gaming activities .....							
<b>10 a</b> Gross sales of inventory, less returns and allowances .....		<b>a</b>					
<b>b</b> Less: cost of goods sold .....	<b>b</b>						
<b>c</b> Net income or (loss) from sales of inventory .....							
<b>Miscellaneous Revenue</b>			<b>Business Code</b>				
<b>11 a</b> MISCELLANEOUS .....		611710	3,144.	3,144.			
<b>b</b> .....							
<b>c</b> .....							
<b>d</b> All other revenue .....							
<b>e Total.</b> Add lines 11a-11d .....			3,144.				
<b>12 Total revenue.</b> See instructions .....			11,427,567.	742,940.	0.	117,187.	



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**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>				
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	258,870.	105,822.	153,048.	
<b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	7,703,503.	7,158,679.	544,824.	
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,560,134.	1,462,954.	97,180.	
<b>9</b> Other employee benefits	505,930.	475,585.	30,345.	
<b>10</b> Payroll taxes	328,016.	309,854.	18,162.	
<b>11</b> Fees for services (non-employees):				
<b>a</b> Management				
<b>b</b> Legal				
<b>c</b> Accounting	26,250.		26,250.	
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees				
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	1,302,509.	981,206.	321,303.	
<b>12</b> Advertising and promotion	2,023.	2,023.		
<b>13</b> Office expenses	89,544.	68,496.	21,048.	
<b>14</b> Information technology				
<b>15</b> Royalties				
<b>16</b> Occupancy	168,074.	168,074.		
<b>17</b> Travel	268,275.	268,275.		
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings				
<b>20</b> Interest	2,120.	986.	1,134.	
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization	166,954.	166,954.		
<b>23</b> Insurance	166,299.	162,873.	3,426.	
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> EDUCATIONAL SUPPLIES AND	478,766.	407,180.	71,586.	
<b>b</b> REPAIRS AND MAINTENANCE	264,528.	264,528.		
<b>c</b> DUES AND FEES	48,386.	48,316.	70.	
<b>d</b> MISCELLANEOUS	2,244.	794.	1,450.	
<b>e</b> All other expenses	60.	60.		
<b>25</b> Total functional expenses. Add lines 1 through 24e	13,342,485.	12,052,659.	1,289,826.	0.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)

**FRENCH AND MONTESSORI EDUCATION INC.**  
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**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	2,152,955.	<b>1</b>	300,138.
	<b>2</b> Savings and temporary cash investments .....		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net .....	341,902.	<b>3</b>	900,281.
	<b>4</b> Accounts receivable, net .....	851,198.	<b>4</b>	4,913.
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	115,209.	<b>9</b>	35,744.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 4,246,328.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 660,530.	<b>10c</b>	3,585,798.
	<b>11</b> Investments - publicly traded securities .....		<b>11</b>	
	<b>12</b> Investments - other securities. See Part IV, line 11 .....	1,397,477.	<b>12</b>	921,079.
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....		<b>15</b>	
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) .....	6,794,725.	<b>16</b>	5,747,953.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	160,663.	<b>17</b>	776,841.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....	94,341.	<b>19</b>	102,037.
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....	0.	<b>25</b>	255,000.
	<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....	255,004.	<b>26</b>	1,133,878.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets .....	5,797,969.	<b>27</b>	4,272,173.
	<b>28</b> Temporarily restricted net assets .....	741,752.	<b>28</b>	341,902.
	<b>29</b> Permanently restricted net assets .....		<b>29</b>	
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here</b> <input type="checkbox"/> <b>and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds .....		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>32</b>	
	<b>33</b> <b>Total net assets or fund balances</b> .....	6,539,721.	<b>33</b>	4,614,075.
	<b>34</b> <b>Total liabilities and net assets/fund balances</b> .....	6,794,725.	<b>34</b>	5,747,953.

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**FRENCH AND MONTESSORI EDUCATION INC.**  
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\*\*-\*\*\*4026 Page **12****Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	11,427,567.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	13,342,485.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	-1,914,918.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	<b>4</b>	6,539,721.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	-10,728.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	<b>10</b>	4,614,075.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
<b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<b>2a</b>	<b>X</b>
<b>b</b> Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<b>2b</b>	<b>X</b>
<b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	<b>2c</b>	<b>X</b>
<b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? _____	<b>3a</b>	<b>X</b>
<b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits _____	<b>3b</b>	<b>X</b>

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## FRENCH AND MONTESSORI EDUCATION INC.

Schedule A (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

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**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....						
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						
<b>6 Public support.</b> Subtract line 5 from line 4.						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>7</b> Amounts from line 4 .....						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>11 Total support.</b> Add lines 7 through 10						
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f)) .....	14	%
<b>15</b> Public support percentage from 2017 Schedule A, Part II, line 14 .....	15	%
<b>16a 33 1/3% support test - 2018.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		
<b>b 33 1/3% support test - 2017.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		
<b>17a 10% -facts-and-circumstances test - 2018.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		
<b>b 10% -facts-and-circumstances test - 2017.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		

Schedule A (Form 990 or 990-EZ) 2018

## FRENCH AND MONTESSORI EDUCATION INC.

Schedule A (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

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**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2018 (line 8, column (f), divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2017 Schedule A, Part III, line 15 .....	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2018 (line 10c, column (f), divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2017 Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2018.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**b 33 1/3% support tests - 2017.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

## FRENCH AND MONTESSORI EDUCATION INC.

Schedule A (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

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**Part IV Supporting Organizations**

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
<b>b</b> <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c</b> <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .		
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer 10b below.		
<b>b</b> Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

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Schedule A (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

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**Part IV** Supporting Organizations (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
<b>11a</b>		
<b>b</b> A family member of a person described in (a) above?		
<b>11b</b>		
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in <b>Part VI</b> .		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
<b>1</b>		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
<b>2</b>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
<b>1</b>		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>1</b>		
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).		
<b>2</b>		
<b>3</b> By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.		
<b>3</b>		

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/>	The organization satisfied the Activities Test. Complete <b>line 2</b> below.	
<b>b</b> <input type="checkbox"/>	The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.	
<b>c</b> <input type="checkbox"/>	The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a government entity (see instructions).	
<b>2</b> Activities Test. Answer (a) and (b) below.		
<b>a</b>	Yes	No
Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
<b>2a</b>		
<b>b</b>	Yes	No
Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
<b>2b</b>		
<b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.		
<b>a</b>	Yes	No
Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in <b>Part VI</b> .		
<b>3a</b>		
<b>b</b>	Yes	No
Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.		
<b>3b</b>		



## FRENCH AND MONTESSORI EDUCATION INC.

Schedule A (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

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**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI.) **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Schedule A (Form 990 or 990-EZ) 2018

## FRENCH AND MONTESSORI EDUCATION INC.

Schedule A (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

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**Part V** Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations	
<b>4</b> Amounts paid to acquire exempt-use assets	
<b>5</b> Qualified set-aside amounts (prior IRS approval required)	
<b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions.	
<b>7</b> <b>Total annual distributions.</b> Add lines 1 through 6.	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions.	
<b>9</b> Distributable amount for 2018 from Section C, line 6	
<b>10</b> Line 8 amount divided by line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2018	(iii) Distributable Amount for 2018
<b>1</b> Distributable amount for 2018 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2018 (reasonable cause required- explain in <b>Part VI</b> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2018			
<b>a</b> From 2013			
<b>b</b> From 2014			
<b>c</b> From 2015			
<b>d</b> From 2016			
<b>e</b> From 2017			
<b>f</b> <b>Total</b> of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2018 distributable amount			
<b>i</b> Carryover from 2013 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
<b>4</b> Distributions for 2018 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2018 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from 4.			
<b>5</b> Remaining underdistributions for years prior to 2018, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>6</b> Remaining underdistributions for 2018. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>7</b> <b>Excess distributions carryover to 2019.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2014			
<b>b</b> Excess from 2015			
<b>c</b> Excess from 2016			
<b>d</b> Excess from 2017			
<b>e</b> Excess from 2018			

Schedule A (Form 990 or 990-EZ) 2018

FRENCH AND MONTESSORI EDUCATION INC.

Schedule A (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

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**Part VI**

**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  
(See instructions.)

DRAFT



**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

- Attach to Form 990, Form 990-EZ, or Form 990-PF.  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2018**

Name of the organization

**FRENCH AND MONTESSORI EDUCATION INC.**  
**DBA AUDUBON CHARTER SCHOOL**

Employer identification number

\*\*-\*\*\*4026

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)( 3 ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ..... ► \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Page **2**

Name of organization <b>FRENCH AND MONTESSORI EDUCATION INC. DBA AUDUBON CHARTER SCHOOL</b>	Employer identification number <b>** - ***4026</b>
--	---

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	FRIENDS OF AUDUBON PTO 428 BROADWAY ST. NEW ORLEANS, LA 70118	\$ 20,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	PRO BONO PUBLICO FOUNDATION P.O. BOX 531024 NEW ORLEANS, LA 70153	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	KELLER FAMILY FOUNDATION 1100 POYDRAS STREET, SUITE 1502 NEW ORLEANS, LA 70163	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	ROSAMARY FOUNDATION, C/O CRESCENT CAPITAL CONSULTING, LLC 1100 POYDRAS STREET, SUITE 1502 NEW ORLEANS, LA 70163	\$ 35,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	NEW SCHOOLS NEW ORLEANS 1555 POYDRAS STREET NEW ORLEANS, LA 70112	\$ 18,030.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	ALAN MELTZER 6500 ROCK SPRINGS DR. STE 500 BETHESDA, MD 20817	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

FRENCH AND MONTESSORI EDUCATION INC.  
DBA AUDUBON CHARTER SCHOOL

Employer identification number

\*\*-\*\*\*4026

**Part II**    **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

[illegible]

Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Page **4**

Name of organization

**FRENCH AND MONTESSORI EDUCATION INC.**  
**DBA AUDUBON CHARTER SCHOOL**

Employer identification number

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**Part III**

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) ▶ \$ \_\_\_\_\_  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

**SCHEDULE D**  
**(Form 990)**Department of the Treasury  
Internal Revenue Service**Supplemental Financial Statements**▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**▶ **Attach to Form 990.**▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

OMB No. 1545-0047

**2018****Open to Public Inspection****Name of the organization** FRENCH AND MONTESSORI EDUCATION INC.  
DBA AUDUBON CHARTER SCHOOL**Employer identification number**  
\*\*-\*\*\*4026**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate value of contributions to (during year) .....		
3 Aggregate value of grants from (during year) .....		
4 Aggregate value at end of year .....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Part II Conservation Easements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ .....

4 Number of states where property subject to conservation easement is located ▶ .....

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ .....

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ .....

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 .....

(ii) Assets included in Form 990, Part X .....

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included on Form 990, Part VIII, line 1 .....

b Assets included in Form 990, Part X .....

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2018

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## FRENCH AND MONTESSORI EDUCATION INC.

DBA AUDUBON CHARTER SCHOOL

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Schedule D (Form 990) 2018

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

a ☐ Public exhibitiond ☐ Loan or exchange programsb ☐ Scholarly researche ☐ Other \_\_\_\_\_c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
1c	
1d	
1e	
1f	

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ☐ %b Permanent endowment ☐ %c Temporarily restricted endowment ☐ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) unrelated organizations

(ii) related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		3,646,980.	200,630.	3,446,350.
d Equipment		599,348.	459,900.	139,448.
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				3,585,798.

Schedule D (Form 990) 2018

## FRENCH AND MONTESSORI EDUCATION INC.

DBA AUDUBON CHARTER SCHOOL

Schedule D (Form 990) 2018

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**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely-held equity interests .....		
(3) Other		
(A) BLACKROCK INVESTMENTS	921,078.	END-OF-YEAR MARKET VALUE
(B) FIRST NBC CDARS	1.	END-OF-YEAR MARKET VALUE
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶	921,079.	

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value	
(1) Federal income taxes		
(2) LINE OF CREDIT	255,000.	
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	255,000.	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII ☒

Schedule D (Form 990) 2018



## FRENCH AND MONTESSORI EDUCATION INC.

DBA AUDUBON CHARTER SCHOOL

Schedule D (Form 990) 2018

\*\*-\*\*\*4026 Page 4

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	11,564,754.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-10,728.
b	Donated services and use of facilities	2b	129,000.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	118,272.
3	Subtract line 2e from line 1	3	11,446,482.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	-18,915.
c	Add lines 4a and 4b	4c	-18,915.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	11,427,567.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	13,490,400.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	129,000.
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	18,915.
e	Add lines 2a through 2d	2e	147,915.
3	Subtract line 2e from line 1	3	13,342,485.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	13,342,485.

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART X, LINE 2:**

THE ORGANIZATION IS RECOGNIZED BY THE INTERNAL REVENUE SERVICE AS A SECTION 501(C)(3) TAX-EXEMPT ORGANIZATION. HOWEVER, INCOME FROM CERTAIN ACTIVITIES NOT DIRECTLY RELATED TO THE SCHOOL'S TAX-EXEMPT PURPOSE IS SUBJECT TO TAXATION AS UNRELATED BUSINESS INCOME.

ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA PROVIDE ACCOUNTING AND DISCLOSURE GUIDANCE ABOUT POSITIONS TAKEN BY AN ENTITY IN ITS TAX RETURNS THAT MIGHT BE UNCERTAIN. THE ORGANIZATION BELIEVES THAT IT HAS APPROPRIATE SUPPORT FOR ANY TAX POSITIONS TAKEN, AND MANAGEMENT HAS DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS THAT ARE MATERIAL TO THE FINANCIAL STATEMENTS.



## FRENCH AND MONTESSORI EDUCATION INC.

DBA AUDUBON CHARTER SCHOOL

Schedule D (Form 990) 2018

\*\*-\*\*\*4026 Page 5

**Part XIII** Supplemental Information (continued)

PENALTIES AND INTEREST ASSESSED BY INCOME TAXING AUTHORITIES, IF ANY, ARE INCLUDED IN INCOME TAX EXPENSE

## PART XI, LINE 4B - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES -18,915.

## PART XII, LINE 2D - OTHER ADJUSTMENTS:

FUNDRAISING EXPENSES 18,915.

DRAFT

**SCHEDULE E**  
**(Form 990 or 990-EZ)**Department of the Treasury  
Internal Revenue Service**Schools**▶ **Complete if the organization answered "Yes" on Form 990,  
Part IV, line 13, or Form 990-EZ, Part VI, line 48.**▶ **Attach to Form 990 or Form 990-EZ.**▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

OMB No. 1545-0047

**2018****Open to Public  
Inspection**Name of the organization **FRENCH AND MONTESSORI EDUCATION INC.  
DBA AUDUBON CHARTER SCHOOL**Employer identification number  
**\*\*-\*\*\*4026****Part I**

- 1** Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body? .....
- 2** Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships? .....
- 3** Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain.  
If you need more space, use Part II .....
- AUDUBON CHARTER SCHOOL HAS PUBLICIZED ITS RACIALLY  
NONDISCRIMINATORY POLICY THROUGH THE FOLLOWING MEDIUMS:  
BROCHURES AND APPLICATION FORMS SENT OUT TO SCHOOLS IN NEW  
ORLEANS AND SURROUNDING PARISHES, LOCAL NEWSPAPERS' EDUCATION  
COLUMNS, NEWSLETTERS, AND ON THE SCHOOL'S WEBSITE.**
- 4** Does the organization maintain the following?
- a** Records indicating the racial composition of the student body, faculty, and administrative staff? .....
- b** Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? .....
- c** Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? .....
- d** Copies of all material used by the organization or on its behalf to solicit contributions? .....
- If you answered "No" to any of the above, please explain. If you need more space, use Part II.
- .....
- .....
- .....
- 5** Does the organization discriminate by race in any way with respect to:
- a** Students' rights or privileges? .....
- b** Admissions policies? .....
- c** Employment of faculty or administrative staff? .....
- d** Scholarships or other financial assistance? .....
- e** Educational policies? .....
- f** Use of facilities? .....
- g** Athletic programs? .....
- h** Other extracurricular activities? .....
- If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.
- .....
- .....
- .....
- 6a** Does the organization receive any financial aid or assistance from a governmental agency? .....
- b** Has the organization's right to such aid ever been revoked or suspended? .....
- If you answered "Yes" on either line 6a or line 6b, explain on Part II.
- 7** Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II .....

	YES	NO
<b>1</b>	X	
<b>2</b>	X	
<b>3</b>	X	
<b>4a</b>	X	
<b>4b</b>	X	
<b>4c</b>	X	
<b>4d</b>	X	
<b>5a</b>		X
<b>5b</b>		X
<b>5c</b>		X
<b>5d</b>		X
<b>5e</b>		X
<b>5f</b>		X
<b>5g</b>		X
<b>5h</b>		X
<b>6a</b>	X	
<b>6b</b>		X
<b>7</b>	X	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) 2018

## FRENCH AND MONTESSORI EDUCATION INC.

Schedule E (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

\*\*-\*\*\*4026 Page 2

**Part II** **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable.

Also provide any other additional information.

**LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:**

THE SCHOOL'S PRIMARY SOURCE OF FUNDING IS THROUGH THE STATE PUBLIC SCHOOL FUND AND THE ORLEANS PARISH SCHOOL BOARD. THE SCHOOL RECEIVED \$8,723,137 FROM THE STATE AND OPSB BASED ON ELIGIBLE STUDENTS IN ATTENDANCE ON A MONTHLY BASIS. STATE AND FEDERAL GRANTS ARE ON A COST REIMBURSEMENT BASIS. AN ACCRUAL IS MADE WHEN ELIGIBLE EXPENSES ARE INCURRED. THE ORGANIZATION RECEIVED 76% OF ITS REVENUES IN THE YEAR ENDED JUNE 30, 2019, FROM THE LOUISIANA DEPARTMENT OF EDUCATION, SUBJECT TO ITS CHARTER SCHOOL CONTRACTS WITH THE ORLEANS PARISH SCHOOL BOARD, 6% FROM OTHER LOUISIANA STATE PROGRAMS, AND 9% OF ITS FUNDING FROM THE FEDERAL GOVERNMENT.



## FRENCH AND MONTESSORI EDUCATION INC.

Schedule G (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

\*\*-\*\*\*4026 Page 2

**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))
		CITY PARK AMUSEMENT NIGHT	NIGHT AT THE COOL ZOO	3	
		(event type)	(event type)	(total number)	
Revenue	1 Gross receipts .....	18,130.	14,885.	17,415.	50,430.
	2 Less: Contributions .....				
	3 Gross income (line 1 minus line 2) .....	18,130.	14,885.	17,415.	50,430.
Direct Expenses	4 Cash prizes .....				
	5 Noncash prizes .....				
	6 Rent/facility costs .....	6,174.	5,236.		11,410.
	7 Food and beverages .....				
	8 Entertainment .....				
	9 Other direct expenses .....			7,505.	7,505.
	10 Direct expense summary. Add lines 4 through 9 in column (d) .....				18,915.
	11 Net income summary. Subtract line 10 from line 3, column (d) .....				31,515.

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue .....				
Direct Expenses	2 Cash prizes .....				
	3 Noncash prizes .....				
	4 Rent/facility costs .....				
	5 Other direct expenses .....				
	6 Volunteer labor .....	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) .....				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) .....				

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: \_\_\_\_\_

## FRENCH AND MONTESSORI EDUCATION INC.

Schedule G (Form 990 or 990-EZ) 2018 DBA AUDUBON CHARTER SCHOOL

\*\*-\*\*\*4026 Page 3

- 11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13 Indicate the percentage of gaming activity conducted in:
- |                               |     |   |
|-------------------------------|-----|---|
| a The organization's facility | 13a | % |
| b An outside facility         | 13b | % |
- 14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

- 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization ► \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ► \$ \_\_\_\_\_

c If "Yes," enter name and address of the third party:

Name ► \_\_\_\_\_

Address ► \_\_\_\_\_

- 16 Gaming manager information:

Name ► \_\_\_\_\_

Gaming manager compensation ► \$ \_\_\_\_\_

Description of services provided ► \_\_\_\_\_

☐ Director/officer☐ Employee☐ Independent contractor

- 17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ \_\_\_\_\_

**Part IV Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

FRENCH AND MONTESSORI EDUCATION INC.

Schedule G (Form 990 or 990-EZ)

DBA AUDUBON CHARTER SCHOOL

\*\* - \*\*\*4026 Page 4

**Part IV** Supplemental Information (continued)

DRAFT



**SCHEDULE O**  
**(Form 990 or 990-EZ)**Department of the Treasury  
Internal Revenue Service**Supplemental Information to Form 990 or 990-EZ**Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2018**Open to Public  
Inspection

Name of the organization

FRENCH AND MONTESSORI EDUCATION INC.  
DBA AUDUBON CHARTER SCHOOLEmployer identification number  
\*\*-\*\*\*4026

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

GRADE. THE FORMATION OF THE SCHOOL WAS IN RESPONSE TO THE DEVASTATION  
LEFT BY HURRICANE KATRINA.

FORM 990, PART VI, SECTION B, LINE 11B:

THE CHAIRMAN AND THE BOARD OF DIRECTORS WILL REVIEW AND APPROVE THE TAX  
RETURN BEFORE IT IS FILED.

FORM 990, PART VI, SECTION B, LINE 12C:

AS PART OF THE ANNUAL AUDIT PROCESS, OFFICERS AND EMPLOYEES MUST DISCLOSE  
ANY INTERESTS THAT COULD GIVE RISE TO CONFLICTS. BOARD MEMBERS READ AND  
SIGN THE CONFLICT OF INTEREST POLICY ANNUALLY.

FORM 990, PART VI, SECTION B, LINE 15:

THE BUDGET AND FINANCE COMMITTEE IS IN CHARGE OF BUDGET DECISIONS,  
INCLUDING DECIDING COMPENSATION FOR ALL EMPLOYEES. THE BUDGET AND FINANCE  
COMMITTEE USES SALARY AMOUNTS FROM SIMILAR POSITIONS AT SURROUNDING SCHOOLS  
AS A BENCHMARK IN CHOOSING AN APPROPRIATE SALARY. THE COMMITTEE MAKES ITS  
INITIAL DECISIONS AND THEN IT GOES TO THE BOARD OF DIRECTORS FOR APPROVAL.  
THE BOARD OF DIRECTORS ARE INDEPENDENT OF THE SCHOOL AND RECEIVE NO  
COMPENSATION FROM THE SCHOOL. ALL DISCUSSIONS AND DECISIONS ARE DOCUMENTED  
IN THE BOARD'S MINUTES.

FORM 990, PART VI, SECTION C, LINE 19:

THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST  
POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC THROUGH PUBLIC

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2018)

832211 10-10-18

Schedule O (Form 990 or 990-EZ) (2018)

Page **2**Name of the organization **FRENCH AND MONTESSORI EDUCATION INC.**  
**DBA AUDUBON CHARTER SCHOOL**Employer identification number  
**\*\* - \*\*\*4026****RECORDS REQUESTS.****DRAFT**

Form **8868**  
(Rev. January 2019)Department of the Treasury  
Internal Revenue Service**Application for Automatic Extension of Time To File an  
Exempt Organization Return**

OMB No. 1545-1709

► **File a separate application for each return.**  
 ► **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

		Enter filer's identifying number
Type or print	Name of exempt organization or other filer, see instructions. <b>FRENCH AND MONTESSORI EDUCATION INC. DBA AUDUBON CHARTER SCHOOL</b>	Employer identification number (EIN) or  <b>**-***4026</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>428 BROADWAY STREET</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>NEW ORLEANS, LA 70118</b>	

Enter the Return Code for the return that this application is for (file a separate application for each return) 01

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**JUSTIN C. ANDERSON**

- The books are in the care of ► **428 BROADWAY STREET - NEW ORLEANS, LA 70118**  
 Telephone No. ► **(504) 274-1952** Fax No. ► \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box ☐   
 • If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 6-month extension of time until **MAY 15, 2020**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ► ☐ calendar year \_\_\_\_\_ or  
 ► ☒ tax year beginning **JUL 1, 2018**, and ending **JUN 30, 2019**.

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev. 1-2019)

# Coversheet

## 2020-2021 Operating Budget Draft Review

<b>Section:</b>	II. Finance Committee
<b>Item:</b>	C. 2020-2021 Operating Budget Draft Review
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	Preliminary Draft Budget 20-21.pdf

**Audubon Schools**  
**Comparative Income Statements**  
**2020 - 2021 Preliminary Budget Schedule**

	AUDUBON UPTOWN FY 2021	AUDUBON GENTILLY FY 2021	AUDUBON CENTRAL OFFICE FY 2021	TOTAL FY 2021	PRIOR YEAR BUDGET	% CHANGE	19-20 PROJECTION
REVENUES AND SUPPORT							
MFP revenues	7,757,626	2,172,380	-	9,930,006	8,973,106	11%	9,642,679
Fee revenues	214,200	158,100	-	372,300	372,300	0%	245,711
Public grants and program funding	1,334,529	300,575	-	1,635,104	2,057,780	-21%	3,770,335
Private grants and donations	191,000	53,000	-	244,000	569,000	-57%	232,462
Income from investments	15,000	-	-	15,000	15,000	0%	65,939
Other income	227,500	32,000	-	259,500	509,368	-49%	594,154
Released from restrictions				-	353,000		353,000
<b>Total revenues and support</b>	<b>9,739,855</b>	<b>2,716,055</b>	<b>-</b>	<b>12,455,910</b>	<b>12,849,554</b>	<b>-3%</b>	<b>14,904,280</b>
EXPENSES							
Salaries	5,338,372	1,633,930	574,283	7,546,585	7,367,929	2%	7,916,124
Benefits	1,498,636	231,120	172,285	1,902,041	2,205,603	-14%	2,033,957
Disposal	15,000	6,000	-	21,000	22,800	-8%	21,523
Dues	32,760	9,240	2,500	44,500	120,000	-63%	53,652
Food service	275,000	100,000	-	375,000	455,000	-18%	213,188
Insurance	225,000	67,500	-	292,500	230,000	27%	253,537
Materials	100,250	68,560	91,846	260,656	421,811	-38%	279,863
Purchased services	740,809	283,028	153,712	1,177,549	957,212	23%	1,153,321
Rentals	21,500	1,000	2,500	25,000	25,500	-2%	24,364
Repairs and maintenance	176,033	97,169	-	273,202	223,200	22%	360,209
Travel	50,000	2,500	5,000	57,500	44,500	29%	60,895
Utilities	175,500	44,000	-	219,500	248,500	-12%	215,239
Depreciation	75,000	105,000	-	180,000	175,000	3%	173,264
Other expenses	12,500	1,000	2,500	16,000	22,500	-29%	17,685
Debt Service	3,000	135,000	-	138,000	132,000	5%	102,761
Student Transportation	60,000	204,500	-	264,500	198,000	34%	156,300
<b>Total expenses</b>	<b>8,799,360</b>	<b>2,989,548</b>	<b>1,004,626</b>	<b>12,793,534</b>	<b>12,849,554</b>	<b>0%</b>	<b>13,035,881</b>
<b>Surplus (Defecit)</b>	<b>\$ 940,495</b>	<b>\$ (273,493)</b>	<b>\$ (1,004,626)</b>	<b>\$ (337,624)</b>	<b>\$ 0</b>		<b>\$ 1,868,399</b>

# Coversheet

## Contract Approval

<b>Section:</b>	II. Finance Committee
<b>Item:</b>	D. Contract Approval
<b>Purpose:</b>	Vote
<b>Submitted by:</b>	
<b>Related Material:</b>	20-21 LOA Audubon Charter (YA).pdf



3900 General Taylor St. #201  
New Orleans, LA 70125  
(504) 523-3525

David LaViscount  
**Audubon Charter School**

May 8, 2020

Dear Principal LaViscount,

This letter reflects our intent to provide a residency and after school programming at Audubon Charter School

Each staff member will work 4 hours per day, Monday Tuesday, Thursday and Friday.  
The total fee for these services is **\$87,457.50**. This includes YALA's administration fee of 15%.

Young Audiences agrees to provide:

- Five teaching artists at \$27.50 per hour, 4 hours per day for 131 days for a total of \$72,050.00
- Supplies at \$4,000.
- As many as 2 Professional Development Workshops per year for classroom teachers at no additional cost to the school.
- Curriculum support and review for teaching artists and ongoing professional development for teaching artists at no additional cost to the school.
- Young Audiences administration costs are 15%. Total Administrative fees equal \$11,407.50

The School agrees to the following:

- Provide a safe and secure space for all activities, and storage facilities when available.
- When appropriate, provide access to student test scores to be used only for program evaluation of YALA.
- Pay all invoices on or before the due dates agreed upon by YALA and the School
- Provide bulletin board space to showcase student work as well as YALA signage and branding materials, which could include banners, yard signs, or plaques.
- Provide access to signed photo releases from parents for YALA's use in promotional materials and/or for purposes of documentation.
- Offer invitations to YALA staff for professional development workshops whenever appropriate.
- All services provided by YALA teaching artists must be contracted directly through YALA.



The total discounted cost to Audubon Charter School for these services is **\$87,457.50**. YALA will invoice Audubon Charter on the monthly basis.

Any unused services will be deducted from your final invoice.

We appreciate your support for this programming and look forward to working with the Audubon leadership and faculty to best implement it. Your signature below indicates your acceptance of this proposal.

Sincerely,

Jon Cospers, Director of Extended Learning

Rickie Nutik, Executive Director

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

David LaViscount, Principal  
Audubon Charter School

# Coversheet

## Financial Statement April 2020

<b>Section:</b>	II. Finance Committee
<b>Item:</b>	E. Financial Statement April 2020
<b>Purpose:</b>	Discuss
<b>Submitted by:</b>	
<b>Related Material:</b>	2004 ACS Financial Statement.pdf

**FRENCH AND MONTESSORI EDUCATION INCORPORATED**

**Financial Statements**

**For the Month Ended April 30, 2020**

These financial statements have not been subject to an audit, review, or compilation engagement, and no assurance is provided on them. Substantially all of the disclosures, and the statement of cash flows, required by accounting principles generally accepted in the United States of America have been omitted.

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Statement of Financial Position	1
Statement of Activities and Change in Net Assets and Budget Comparison for the nine months ended April 30, 2020	2
Statement of Activities and Change in Net Assets and Budget Comparison for the ten months ended April 30, 2020	3
Statment of Cash Flows for the period ended April 30, 2020	4
Management's Discussion and Analysis	5-6

These financial statements have not been subject to an audit, review, or compilation engagement, and no assurance is provided on them. Substantially all of the disclosures, and the statement of cash flows, required by accounting principles generally accepted in the United States of America have been omitted.

**FRENCH AND MONTESSORI EDUCATION INCORPORATED  
D/B/A AUDUBON CHARTER SCHOOL  
STATEMENT OF FINANCIAL POSITION  
FOR THE MONTH ENDED APRIL 30, 2020**

**ASSETS****CURRENT ASSETS**

Cash and cash equivalents	\$ 2,705,379
Accounts receivable	648,822
Investments	983,339
Prepaid expenses and other current assets	<u>34,401</u>
Total current assets	4,371,941

PROPERTY AND EQUIPMENT, net	<u>3,809,215</u>
-----------------------------	------------------

<b>TOTAL ASSETS</b>	<b><u>\$ 8,181,156</u></b>
---------------------	----------------------------

**LIABILITIES AND NET ASSETS****CURRENT LIABILITIES**

Accounts payable and accrued expenses	\$ 63,788
Accrued salaries and benefits payable	896,546
Deferred revenues	<u>12,710</u>
Total current liabilities	973,044

**LONG TERM LIABILITIES**

Note Payable	<u>4,075,865</u>
Total long term liabilities	4,075,865

**NET ASSETS**

Unrestricted net assets	<u>3,132,243</u>
-------------------------	------------------

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b><u>\$ 8,181,156</u></b>
---	----------------------------

**FRENCH AND MONTESSORI EDUCATION INCORPORATED  
D/B/A AUDUBON CHARTER SCHOOL  
STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS AND BUDGET COMPARISON  
FOR THE NINE MONTHS ENDED APRIL 30, 2020**

	<b>AUDUBON UPTOWN Actual</b>	<b>AUDUBON GENTILLY Actual</b>	<b>AUDUBON CENTRAL OFFICE Actual</b>	<b>TOTAL</b>	<b>% ACHIEVED OF ANNUAL</b>
<b>REVENUES AND SUPPORT</b>					
MFP revenues	\$ 6,598,804	\$ 1,411,458	\$ -	\$ 8,010,262	89%
Fee revenues	150,526	77,358	-	\$ 227,884	61%
Public grants and program funding	981,181	179,847	-	\$ 1,161,028	56%
Private grants and donations	210,564	52,978	-	\$ 263,542	46%
Income from investments	43,693	518	-	\$ 44,211	295%
Other income	397,380	53,500	-	\$ 450,880	89%
Released from restrictions				-	
Total revenues and support	8,382,148	1,775,659	-	\$ 10,157,807	79%
<b>EXPENSES</b>					
Salaries	\$ 5,157,536	\$ 1,402,905	\$ 594,966	\$ 7,155,407	97%
Benefits	1,465,250	194,121	201,383	\$ 1,860,754	84%
Disposal	10,962	3,374	-	\$ 14,336	63%
Dues	27,172	7,615	14,352	\$ 49,139	41%
Food service	183,910	63,302	-	\$ 247,212	54%
Insurance	164,359	23,325	-	\$ 187,684	82%
Materials	159,506	31,987	12,542	\$ 204,035	48%
Purchased services	752,515	179,808	60,376	\$ 992,699	104%
Rentals	22,252	-	268	\$ 22,520	88%
Repairs and maintenance	179,198	87,187	-	\$ 266,385	119%
Travel	41,755	1,301	227	\$ 43,283	97%
Utilities	136,167	32,878	-	\$ 169,045	68%
Depreciation	61,033	83,354	-	\$ 144,387	83%
Other expenses	9,426	268	2,275	\$ 11,969	53%
Debt Service	1,956	106,418	-	\$ 108,374	82%
Student Transportation	70,240	92,170	-	\$ 162,410	82%
Total expenses	8,443,237	2,310,013	886,389	11,639,639	91%
<b>CHANGE IN NET ASSETS</b>	<b>\$ (61,089)</b>	<b>\$ (534,354)</b>	<b>\$ (886,389)</b>	<b>\$ (1,481,832)</b>	
NET ASSETS - Beginning of period				4,614,075	
<b>NET ASSETS - End of period</b>				<b>\$ 3,132,243</b>	

These financial statements have not been subject to an audit, review, or compilation engagement, and no assurance is provided on them. Substantially all of the disclosures required by accounting principles generally accepted in the United States of America have been omitted.

**FRENCH AND MONTESSORI EDUCATION INCORPORATED**  
**D/B/A AUDUBON CHARTER SCHOOL**  
**STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS AND BUDGET COMPARISON**  
**FOR THE MONTH ENDED APRIL 30, 2020**

	AUDUBON UPTOWN	AUDUBON GENTILLY	AUDUBON CENTRAL OFFICE	Total	Budeted	Variance
	Actual	Actual	Actual			
<b>REVENUES AND SUPPORT</b>						
MFP revenues	\$ 867,678	\$ 237,640	-	\$ 1,105,318	\$ 747,759	357,559
Fee revenues	16,020	14,543	-	30,563	\$ 37,230	(6,667)
Public grants and program funding	75,347	1,750	-	77,097	\$ 205,778	(128,681)
Private grants and donations	55,862	4,807	-	60,669	\$ 56,900	3,769
Income from investments	87	-	-	87	\$ 1,250	(1,163)
Other income	14,026	3,621	-	17,647	\$ 50,937	(33,290)
Released from restrictions					\$ -	-
Total revenues and support	1,029,020	262,361	-	1,291,381	1,099,854	191,527
<b>EXPENSES</b>						
Salaries	\$ 421,808	\$ 126,097	\$ 54,366	\$ 602,271	\$ 613,994	(11,723)
Benefits	146,600	19,703	16,657	182,960	\$ 183,800	(840)
Disposal	-	-	-	-	\$ 1,900	(1,900)
Dues	1,563	521	-	2,084	\$ 10,000	(7,916)
Food service	24,389	8,164	-	32,553	\$ 40,197	(7,644)
Insurance	6,998	2,333	-	9,331	\$ 18,647	(9,316)
Materials	579	286	-	865	\$ 35,151	(34,286)
Purchased services	38,479	15,201	15,000	68,680	\$ 97,932	(29,252)
Rentals	2,116	-	-	2,116	\$ 765	1,351
Repairs and maintenance	21,574	6,672	-	28,246	\$ 18,600	9,646
Travel	(49)	-	-	(49)	\$ 3,708	(3,757)
Utilities	11,887	2,423	-	14,310	\$ 20,708	(6,398)
Depreciation	6,103	8,335	-	14,438	\$ 14,583	(145)
Other expenses	-	-	-	-	\$ 1,875	(1,875)
Debt Service	-	19,933	-	19,933	\$ 11,000	8,933
Student Transportation	-	-	-	-	\$ 19,800	(19,800)
Total expenses	682,047	209,668	86,023	977,738	1,092,660	(114,922)
<b>CHANGE IN NET ASSETS</b>				<b>\$ 313,643</b>	<b>\$ 7,194</b>	<b>\$ 306,449</b>
NET ASSETS - Beginning of month				2,818,599		
<b>NET ASSETS - End of month</b>				<b><u>\$ 3,132,242</u></b>		

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**FRENCH AND MONTESSORI EDUCATION INCORPORATED**  
**D/B/A AUDUBON CHARTER SCHOOL**  
**STATEMENT OF CASH FLOWS**  
**FOR THE MONTH ENDED APRIL 30, 2020**

**Cash Flows from Operating Activities**

Changes in Net Assets	\$ (1,481,832)
Adjustments to Reconcile Change in Net Assets to	
Net Cash Provided by Operating Activities	
Net Realized and Unrealized Loss on Investments	(29,957)
Depreciation	144,385
(Increase) Decrease in Assets	-
Accounts Receivable	251,459
Interest Receivable	4,913
Prepaid Expenses	1,343
Increase (Decrease) in Liabilities	-
Accounts Payable	(284,634)
Accrued liabilities	213,127
Deferred Revenue	(89,327)
Total Adjustments	<u>211,310</u>
Net Cash Provided by Operating Activities	<u>\$ (1,270,522)</u>

**Cash Flows from Investing Activities**

Sale of Investments	(32,304)
Purchases of Fixed Assets	<u>(367,803)</u>
Net Cash Used in Investing Activities	<u>\$ (400,107)</u>

**Cash Flows from Financing Activities**

Long term note payable	<u>4,075,865</u>
Net Cash Provided by Financing Activities	<u>\$ 4,075,865</u>

<b>Net Increase in Cash</b>	<b>\$ 2,405,236</b>
<b>Cash, Beginning of Year</b>	<b>\$ 300,138</b>
<b>Cash, End of Year</b>	<b><u><u>\$ 2,705,374</u></u></b>

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**FRENCH AND MONTESSORI EDUCATION INCORPORATED  
D/B/A AUDUBON CHARTER SCHOOL**

**STATEMENT OF CASH FLOWS**

generally accepted in the United States of America have been omitted.  
**FOR THE MONTH ENDED APRIL 30, 2020**

**FRENCH AND MONTESSORI EDUCATION INCORPORATED  
D/B/A AUDUBON CHARTER SCHOOL  
MANAGEMENT DISCUSSION AND ANALYSIS  
APRIL 30, 2020**

**1. MFP REVENUES**

The total 2% administrative fee, charged by the OPSB for its supervisory role in being the school's granting authority, retained by OPSB for fiscal year 2019-20, is \$174,971 through APRIL 30, 2020 and is recorded within Purchased Services on the Statement of Activities and Change in Fund Balance.

**2. PUBLIC GRANTS & PROGRAM FUNDING**

	<u>Month</u>	<u>Year to Date</u>	<u>Annual Budget</u>	<u>% ACHIEVED</u>
NCLB - Title I		257,578	\$ 325,258	
Title II - Improving Teacher Quality		-		
IDEA-B		141,811		
LA 4	27,938	172,666		
EEF		37,500		
CODOFIL Stipends		63,250		
2018-19 F.A.T. Salary	33,250	299,250		
New School for Nola		-		
Federal Lunch Program	15,909	188,974		
Literacy Grant		-		
Total Public Grants and Program Funding	<u>\$ 77,097</u>	<u>\$ 1,161,028</u>	<u>\$ 2,057,780</u>	<u>56%</u>

**3. PRIVATE GRANTS AND DONATIONS**

	<u>Month</u>	<u>Year to Date</u>	<u>Annual Budget</u>	<u>% ACHIEVED</u>
Chinese - Donation In-Kind (Salaries)	12,900	116,100		
LASIP Program		-		
Give Nola		8,482		
Sunship		-		
DISASTER GRANT	10,000	10,000		
Keller Family		-		
Rosamary Foundation		-		
Annual Giving and Other Donations	17,467	43,880		
Cool Zoo		15,751		
City Park		302		
Kellogg Grant		-		
PTO Mini Grant		-		
Walton Grant		-		
Pro Bono Publico Foundation Grant		15,000		
CSGF	20,000	40,000		
FAME BOARD		-		
GNOF		-		
Fais Do-Do	302	687		
Misc Donations		13,340		
Total Private Grants and Donations	<u>\$ 60,669</u>	<u>\$ 263,541</u>	<u>\$ 569,000</u>	<u>46%</u>

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**FRENCH AND MONTESSORI EDUCATION INCORPORATED  
D/B/A AUDUBON CHARTER SCHOOL  
MANAGEMENT DISCUSSION AND ANALYSIS  
APRIL 30, 2020**

<b>4. OTHER INCOME</b>	<b>Month</b>	<b>Year to Date</b>	<b>Annual Budget</b>	<b>% ACHIEVED</b>
Charter Care and Arts Reach	\$ 1,705	\$ 249,379		
Other Student Activity	525	68,767		
Consumable Fees	12,710	75,594		
EarthKeepers		-		
Summer Camp	2,500	15,424		
Food Service Revenues	207	15,957		
Other Miscellaneous		25,762		
Total Other Income	<u>\$ 17,647</u>	<u>\$ 450,883</u>	<u>\$ 509,368</u>	<u>89%</u>

<b>5. INVESTMENTS</b>	<b>Balance at 4/30/2020</b>
CDARS Account:	
Principal	
Accrued Interest	
Subtotal	<u>-</u>
Merrill Lynch Account:	
Cash/Money account	25,054
Government and Agency Securities	507,293
Corporate Bonds	229,768
Blackrock Mutual Fund	217,685
Accrued Interest	<u>3,539</u>
Subtotal	<u>983,338</u>
Total Investments	<u>\$ 983,338</u>

These financial statements have not been subject to an audit, review, or compilation engagement, and no assurance is provided on them. Substantially all of the disclosures, and the statement of cash flows, required by accounting principles generally accepted in the United States of America have been omitted.

# Coversheet

## Strategic Plan Draft Review

**Section:** III. Other Business  
**Item:** A. Strategic Plan Draft Review  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:**  
BW-CSGF SGI 2\_Audubon Charter School Strategic Plan\_FAME Presentation.pdf



# Audubon Charter School

## *Strategic Plan*

Winter 2020

# Audubon Charter School

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Who We Are

Our Impact

Looking Forward

How We'll Get There



# Audubon Schools' empowers students through access to a high quality, tailored education experience

## Vision

Audubon provides opportunity for students in New Orleans to take part in an educational environment that will not only provide them with a high-quality, well-rounded education, but also develop the skill set needed to be successful in a shifting, globalized career landscape and society

## Key Facts

**1,114 students**

**Grades PreK- 8**

**2 schools** (Gentilly + Uptown)

**3 campuses** (Gentilly, Uptown Broadway, Uptown Milan)



# Audubon's design reflects its history - with diverse learning pathways that appeal to broad range of needs/ interests

A common, mission-oriented mindset propels team...

Teachers, leaders, and staff **share a belief in the potential of all students** to reach their goals, demonstrated by:

- Creativity
- Flexibility
- Initiative
- Collaboration
- Growth mindset
- Joy

...to support implementation of learning pathways...

## Montessori

*Audubon leverages & adapts the highest impact components of AMS model + arts for a public school setting*

## Montessori in French Environment

*Audubon integrates French exposure into Montessori to bring language benefits to more students*

## French Immersion

*Audubon delivers learning in French, via the French instructional approach for truly immersive learning*

...and drive impact for all students

Students are **actively engaged** in learning in order to become **responsible citizens in a changing world** who demonstrate:

- Global mindset
- Creative thinking
- Problem solving
- Collaboration
- Agency

**At Audubon, students enroll in one of the three learning pathways listed above. These operate as distinct “schools” within the Audubon network**

# Montessori: Audubon leverages & adapts the highest impact components of AMS model + arts for a public school setting

*Learning in all Audubon Montessori classrooms is founded on 6 pillars:*

## Exposure to Arts

### Teacher Skills and Mindsets

Credentialed Montessori teachers have the mindset, skillset, and support needed to effectively **adapt, implement, and integrate Montessori + exposure with creative and cultural arts** so that students have access to the benefits of the model(s) in a public school environment

### Learning by Doing

Intentionally designed **materials and experiences are part of the curriculum** (rather than supports). In grades PK-3, materials build concrete skills and students participate in **creative movement/visual arts** sessions. In grades 4-8, application and curated experiences to build habits and mindsets; students engage in **theater, art, and music**

### Child-Directed Work

Students are given **agency to self-select work**, leading to intrinsic motivation and sustained attention. **Nature and extent of choice increases with grade level** (½ day work contract for PK, 1-5 days for K-3, unit-level contract and personalized schedule for later grades)

### Un-interrupted Work Periods

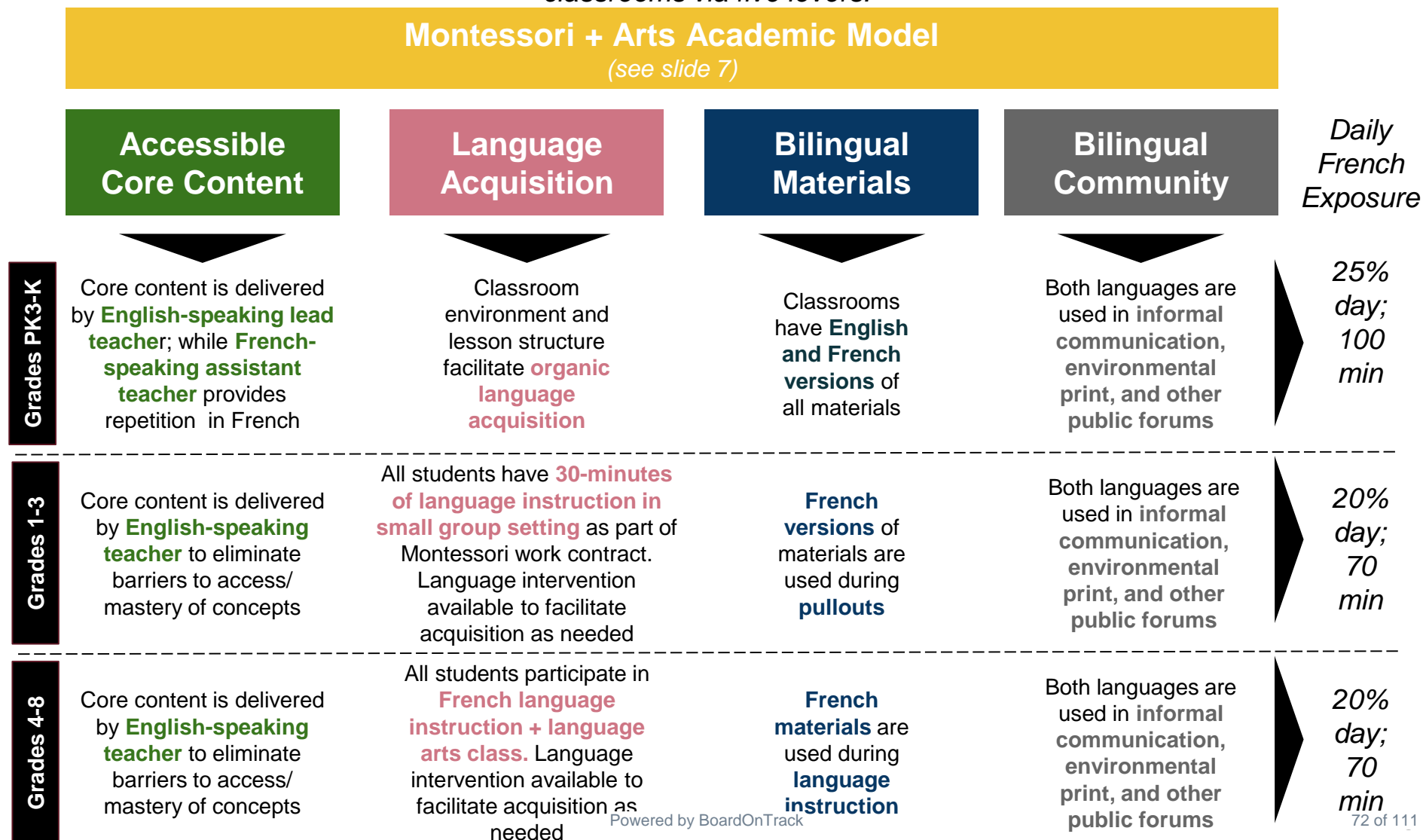
Extended periods of “free choice” enable students to **work at their own pace and without interruption**. To ensure the right breadth/ depth of content, **structure differs by level**: In PK-3, students have 2-3 hour work blocks; in later grades, a block schedule of interdisciplinary core classes

### Multi- Age Classroom

Age span brings a greater **range of content to differentiate for/engage each child**. To ensure the right breadth/ depth of content for assessments, **age bands differ by level**: multi-age for PreK-3; multi-age homeroom with single-age core for 4-6; multi-age homeroom with core by ability level for 7-8

# Montessori in French Environment: A model prioritizing French exposure brings language benefits to more students

*Students access core learning + language exposure in all Montessori in French Environment (MFE) classrooms via five levers:*



# French Immersion: Audubon delivers learning in French, via the French instructional approach for truly immersive learning

*Immersion is supported by four pillars:*

## Accredited French Curriculum

French immersion goes beyond language at Audubon; all classes follow an accredited **French curriculum**, opening the door to diversity of thought and learning philosophies (including a focus on role of art), with **all content delivered in French**. Graduates leave proficient in French and with learning credits transferable to French learning institutions worldwide

## Native Speakers as Teachers

Teachers whose first language is French come to Audubon from the Codofil (French government teaching exchange) program, where they are trained to deliver the French curriculum. This ensures that Audubon teachers are **fluent not only in the language, but in the French approach to learning**

## Language Immersion

Students spend the **80% of the day immersed in French, which facilitates high language proficiency**. ~20% day is in English (students have an English-led ELA class and may choose an English-led elective) which allows students to access benefits of other pathways available at Audubon

## Bilingual Community

As French program is housed in the same campus as Montessori, both languages are used in **informal communication, signage, and other public forums**; this allows students to interact and learn from peers in different learning and language pathways

# All pathways are designed to prepare students for success in a shifting, globalized, career landscape and society

## Audubon Student Success Profile

### Global Mindset

*Demonstrate appreciation/ respect for other backgrounds and perspectives while celebrating their own identities*

- 75% students self-report appreciation on survey\*
- 75% students demonstrate interest in work history\*\*
- 90% students participate in language/ culture class

### Creative Thinking

*Appreciate the arts and understand role in facilitating other SSP traits*

- 75% students participate in external showcase
- 75% students demonstrate interest in work history\*\*
- 85% students participate in arts class

### Problem Solving

*Persist and try multiple strategies when faced with a challenge; can think “outside the box”*

- 75% students bring a solution when they see a problem
- 75% students demonstrate persistence/ multiple strategies to overcome in work history\*\*

### Collaboration

*Seek out opportunities to work with peers when interest/ goal alignment is evident*

- 75% students self-report encouragement to ask a peer for help on survey\*
- 75% students take active role in long term project 2X/ year

### Agency

*Feel confident in perspectives and can articulate and validate with evidence; change agents for causes they feel passionately about*

- 80% students self-report feeling empowered to lead on survey\*
- 90% students have opportunity to participate in service projects



# Audubon Charter School

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Who We Are

Our Impact

Looking Forward

How We'll Get There

# Audubon's unique approach to learning has intentionally evolved alongside the community...

**1981:** 4 passionate **Montessori-trained teachers** petition the district to start a public program; pilot is successful

**1981:** District decides to scale pilot in a vacant Uptown facility - **Audubon is founded!**  
Community demand is demonstrated by a 2 week campout for enrollment

**1986:** Early success builds Audubon's reputation as a trailblazer; founder leverages opportunity to **introduce another innovative model - French**

**1986:** The French government, looking to broaden reach of impactful model, and makes Audubon an **official French School**

**2006:** In the wake of **Hurricane Katrina**, **district schools are closed** and the school system is reorganized into charters

**2006:** **Community petitions to reopen Audubon as charter** based on track record and unique value proposition

**2007-15:** Transportation and other challenges prevent many families from looking beyond neighborhood schools; **citywide movement starts to improve access** to high performing options

**2007-15:** Audubon continues to drive impact for students; Audubon **adjusts recruitment strategies and prerequisites to attract/ encourage families** from across New Orleans to apply

**2016:** Not satisfied that all students have access to high performing options like Audubon, the school 1) further adapts recruiting strategies to encourage enrollment from across the city, and 2) begins to **think about replication**

**2017:** A facility stands vacant in **Gentilly**; the community asks **Audubon to open another site** in their neighborhood

**2018:** **Gentilly opens with another innovative model - Bilingual Montessori**, intended to marry the best parts of Audubon's legacy programs

1980

1990

2000

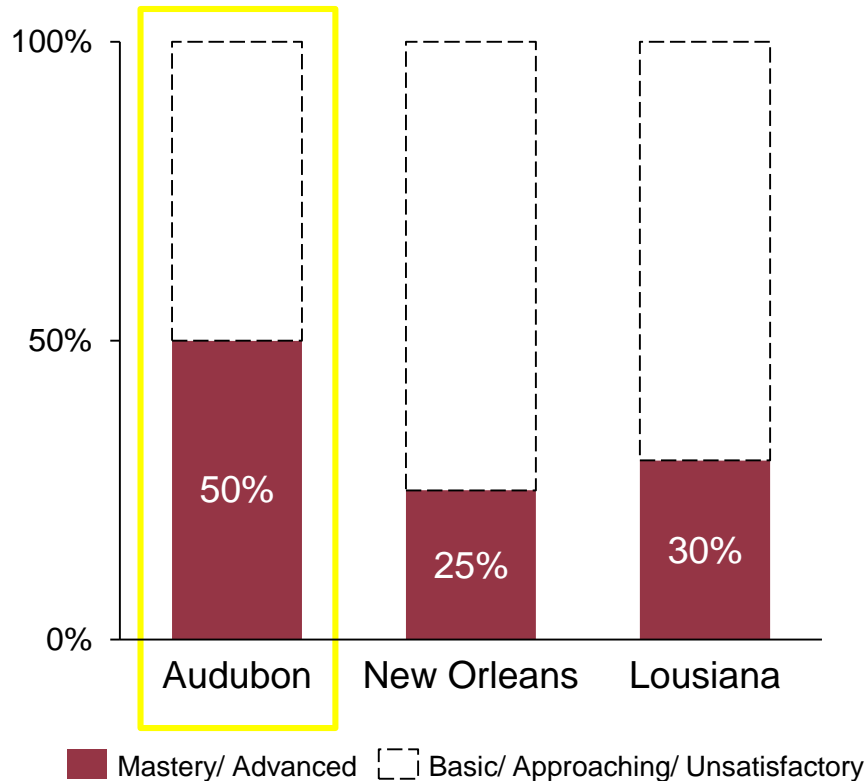
2010

2020

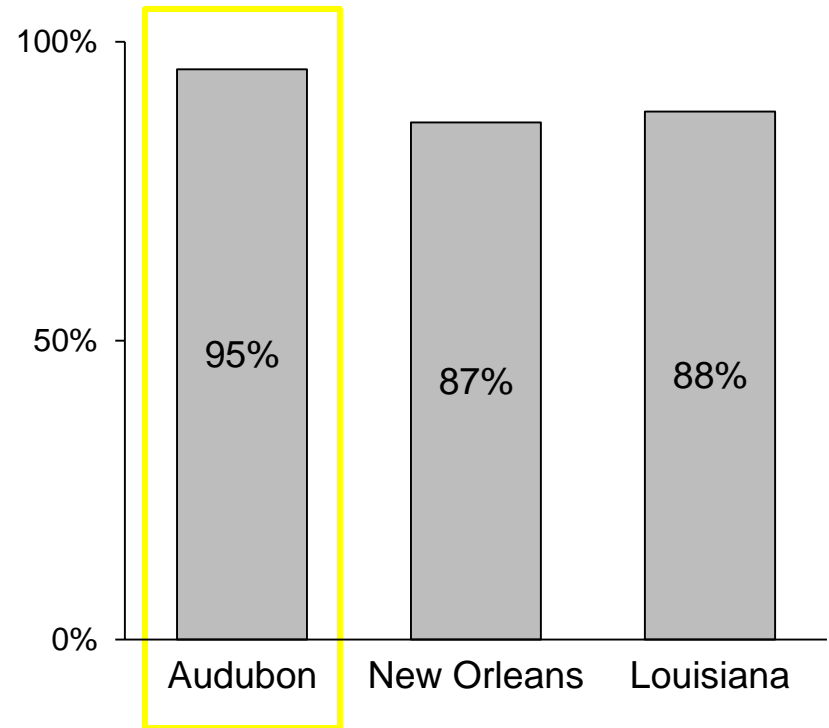


# ... to effectively support student growth and proficiency levels that exceed peers' in local and state schools

**% students by proficiency level (SY18/19)**



**School rating for student growth (SY18/19)**

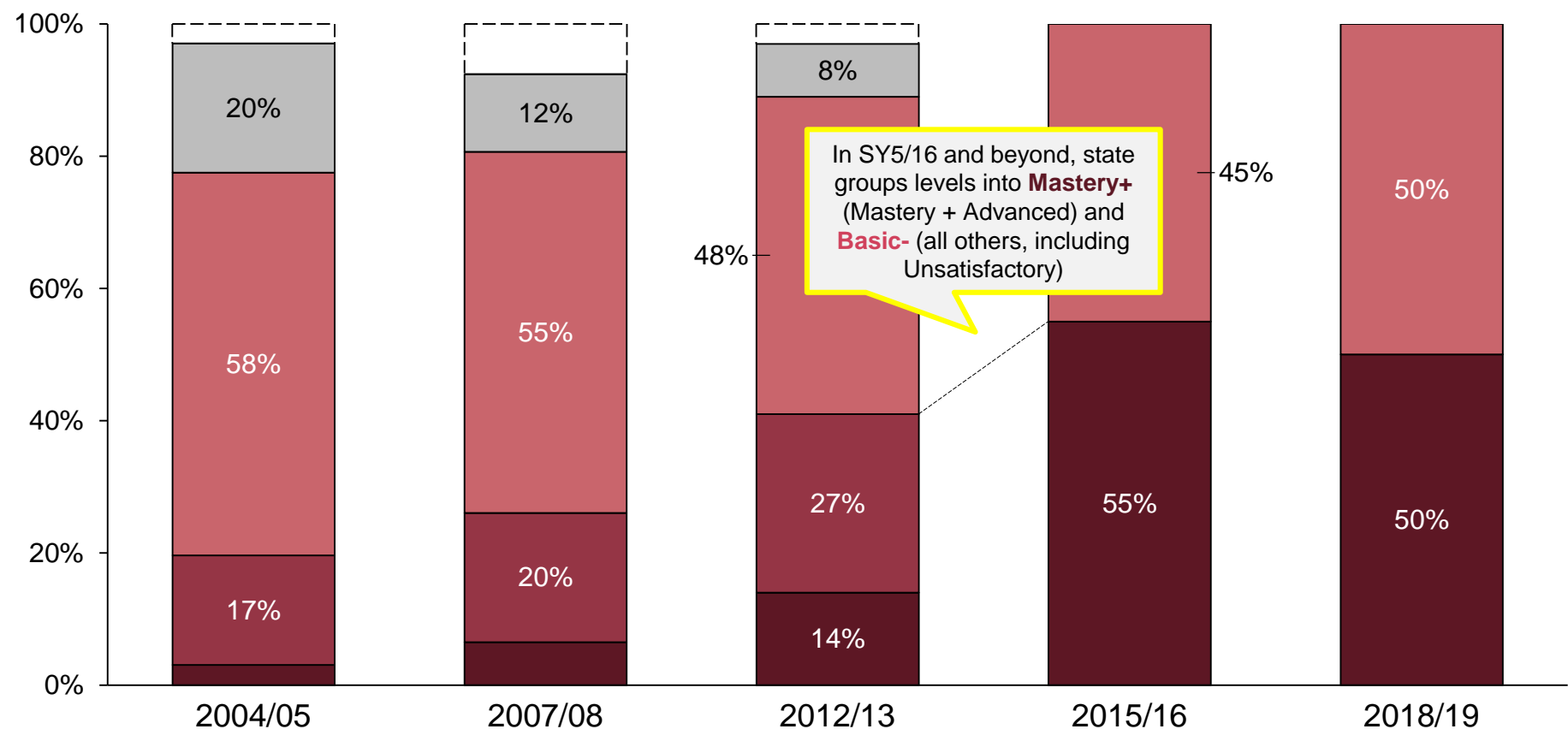


In SY18/19, Audubon received an **overall performance rating of 87**. This is higher than the majority of public elementary schools across New Orleans and Louisiana

# What's more, the share of Audubon students achieving advanced/ mastery proficiency has grown to >50% with time

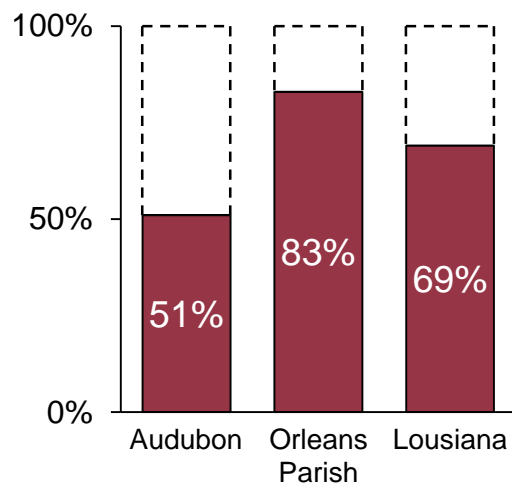
**% Audubon students achieving mastery by year**

Advanced
  Basic
  Unsatisfactory  
 Mastery
  Approaching



# However, Audubon hasn't yet reached its goal of access to the highest quality education for all students

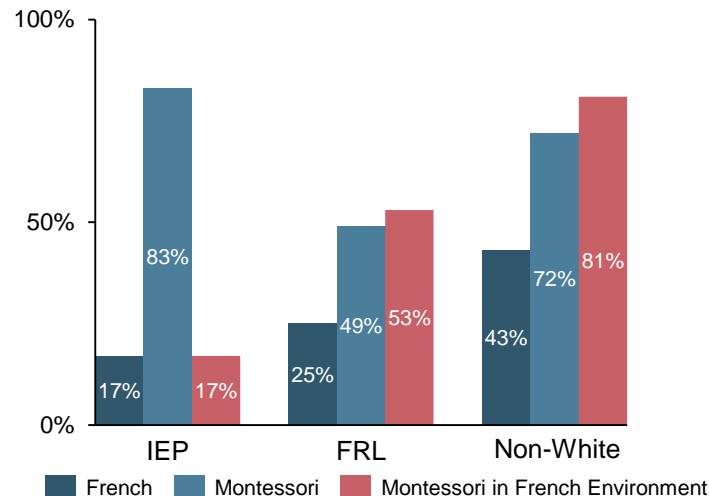
## Relatively low % econ. disadvantaged students



Audubon was founded as a neighborhood school in relatively affluent neighborhood; **local community continues to make up major component of enrollment** at Uptown campus

&amp;

## Distribution of students by program is uneven



French program has admissions requirements that are barriers to entry; **students with different backgrounds (and the majority of those with diverse learning needs) often choose Montessori**

&amp;

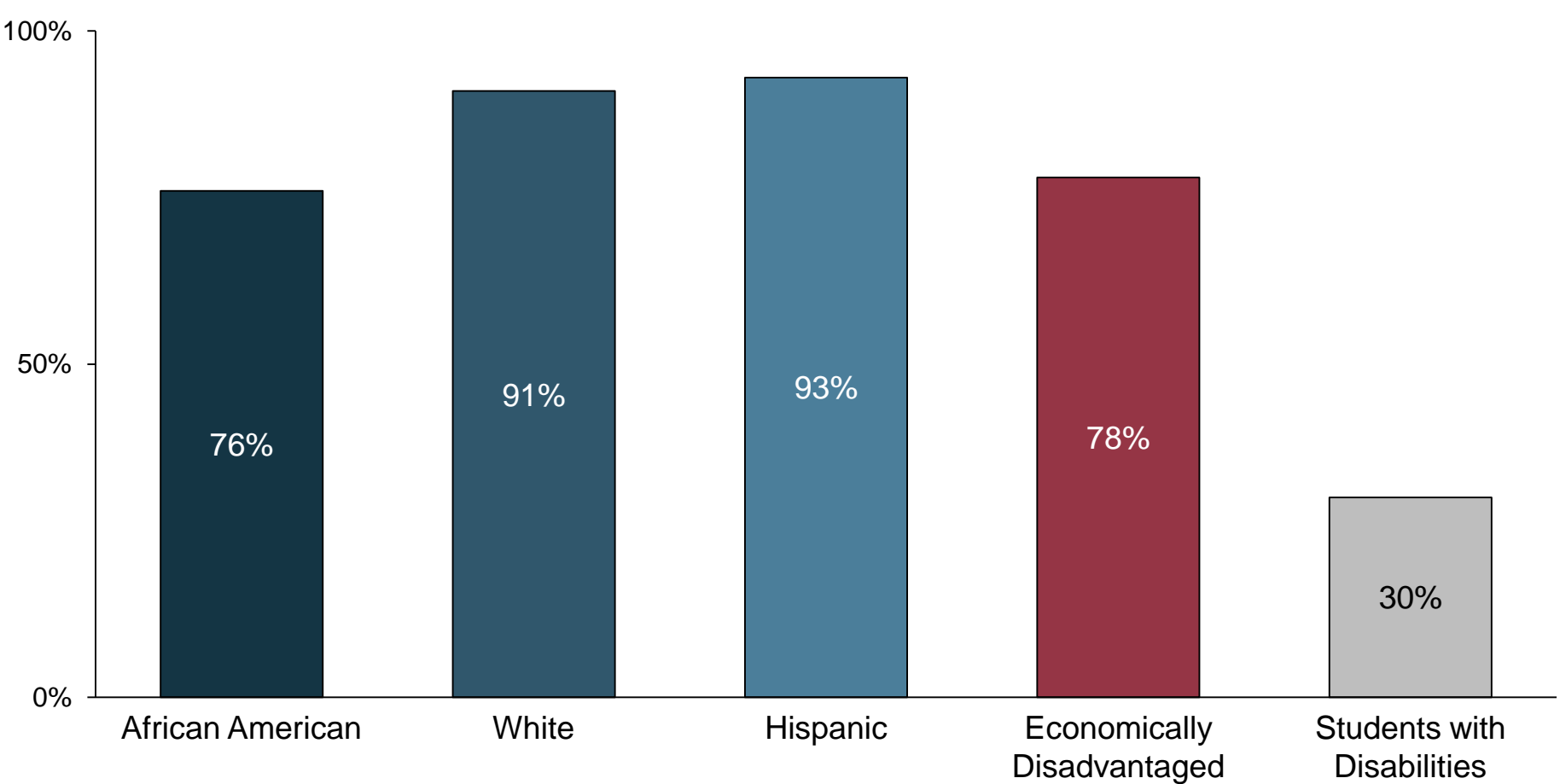
## Instructional quality, rigor, fidelity differs by program

- **French is highly codified** and consistently delivered by trained staff
- Shifting policy context and learning needs of students in **Montessori and Montessori Bilingual** has prevented **codification**; as a result, expectations and implementation differ by classroom

Students in **Montessori classrooms may not receive the support they need to succeed**

# As a result, though all subgroups outperform peers in counterpart schools, achievement gaps persist within Audubon

***Audubon student average percentile performance vs peers statewide by subgroup (SY18/19)***



Source: Audubon report card (2018/19)

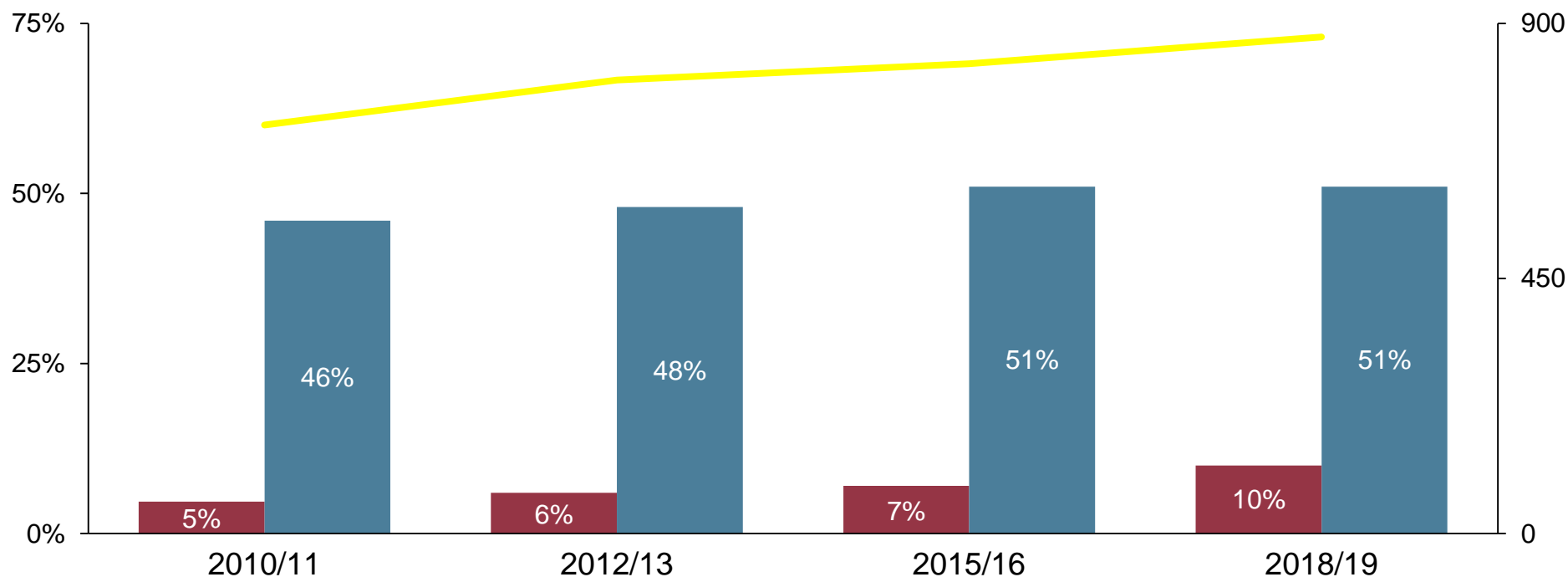
Powered by BoardOnTrack

Note: all performance data reflects Uptown campus only, as Gentilly has not yet received performance data from the state

# And, as Audubon has begun work to improve access by welcoming more students, with more diverse needs...

% Audubon student population by subgroup by year

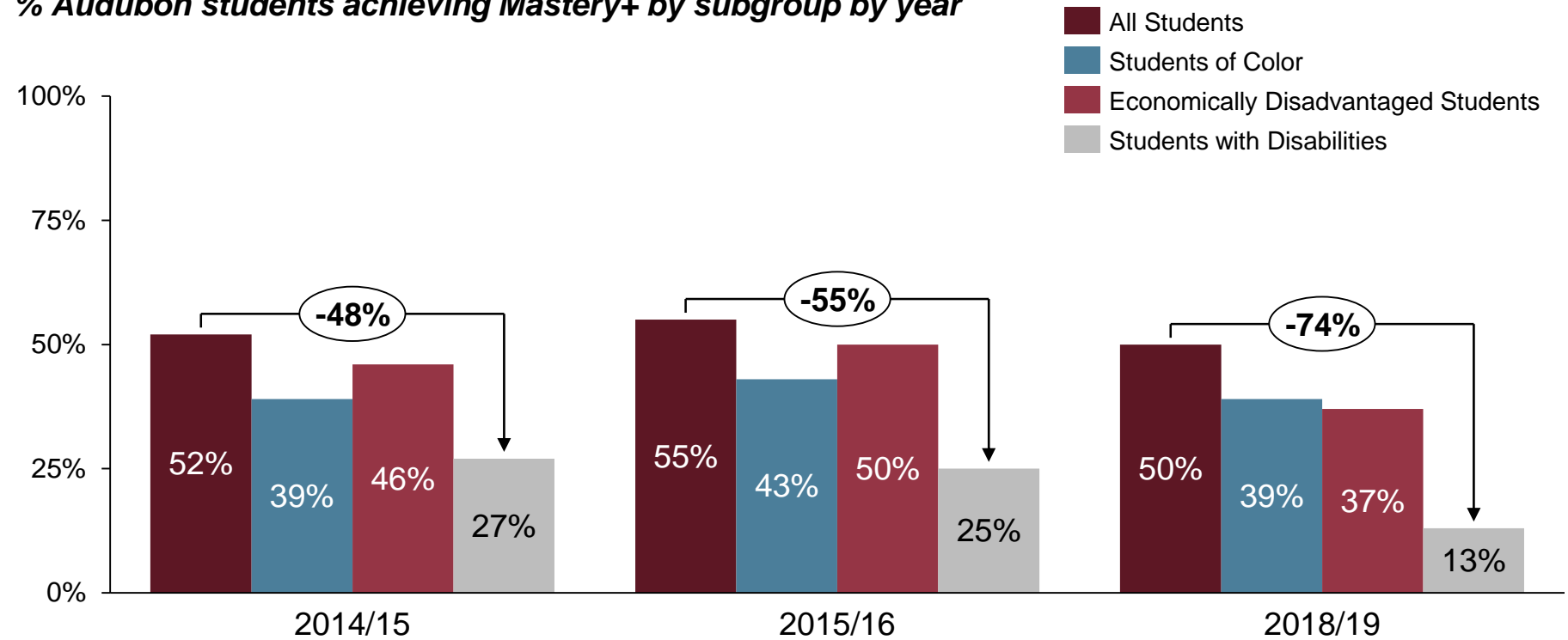
Students with Disabilities  
Economically Disadvantaged Students  
Total Enrollment



Over the last few years, Audubon has developed **new recruiting and support programs to encourage students from all backgrounds to enroll** and make an informed choice about which program to enroll in

# ...achievement gaps have widened - especially for students with disabilities

% Audubon students achieving Mastery+ by subgroup by year



Achievement gaps indicate that students from all backgrounds are **not yet able to access full benefits** of Audubon's model

Source: Audubon report card by year; data unavailable for SY17/18

Powered by BoardOnTrack

Note: all performance data reflects Uptown campus only, as Gentilly has not yet received performance data from the state

# Audubon Charter School

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Who We Are

Our Impact

Looking Forward

How We'll Get There

# Over the next 10 years, Audubon plans to continue to evolve and expand access across New Orleans

Audubon will expand ACCESS for all New Orleans students via four levers:

1

## Improve quality of programming

*Improve, codify, and support implementation of highest quality programming at current campuses to close achievement gaps while maintaining high standards*

2

## Expand reach of network

*Replicate Gentilly model in 2 new elementary school campuses in New Orleans East and West Bank*

3

## Build pipeline of effective talent

*Evolve, gain accreditation, and enroll more prospective talent in the Montessori Training Center to better support current and future schools*

4

## Prepare young children for success

*Open an early childhood center that leverages the Montessori model to help students develop skills needed for success in elementary school*

Audubon will define success by:

**40% decrease  
in gap across  
subgroups**

**1000 more  
Students  
Served**

**50-75 more  
Teachers  
Proficient in  
Model(s)**

**30% increase in  
Kindergarten  
Readiness across  
community**



# As a starting point for development of expansion plan, Audubon underwent a current state assessment

*Current state assessment elevate insights about:*

## Strengths

*that Audubon should  
codify/ leverage to support  
improved access and  
eventual growth*

## Opportunities

*for improvement in student  
impact, organizational  
effectiveness, and readiness  
for sustainable growth*

**The following slides provide more detail on both  
sets of insights**

# **Strengths:** culture, commitment to community and mission, and continuous growth mindset drive impact



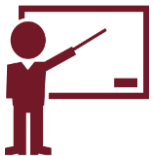
Staff and parents interviewed believe Audubon's rich **40-year history** of preparing students for high school has built a **known brand** in the city



A **nurturing and welcoming culture** was noted by leaders/ staff interviewed as **consistent** across campuses



**Committed leaders with strong vision** for respective schools, as well as clear understanding of where the school is now and **what needs to happen**



**Teacher retention is high** and many are personally connected to Audubon's community and history; those interviewed expressed strong commitment to mission of school



Staff interviewed demonstrate a **desire to learn and grow professionally** in order to make progress towards goals; they seek opportunities to accelerate impact for students and **learn from each other**

# **Opportunities:** inconsistent quality, rigor, and fidelity of implementation act as barriers to access (1 of 2)



A shifting policy landscape has made alignment with state standards challenging; as a result full **program is not yet codified. Without set framework,**

- Teacher **training has been inconsistent**, and
- **Fidelity to model(s) varies** significantly across classrooms/ campuses, and
- **Retention has suffered** (though still relatively high); this perpetuates the cycle



**Leaders are at different stages at development & experience;** although all campuses demonstrate strengths, they do so to different extents



**Quality/ rigor/ fidelity of instruction varies** by Montessori classroom, perhaps driven by:

- **Inconsistent levels of training** in model for teacher
- Changing enrollment demographics; teachers may not yet be prepared to meet **shifting needs of students**

# ***Opportunities:*** inconsistent quality, rigor, and fidelity of implementation act as barriers to access (2 of 2)



Student population **demographics vary significantly by program**, which may unintentionally create inequities; staff report that this may be driven by parents:

1. **Not fully understanding unique value propositions** of programs, and/ or
2. **Not having resources needed to support** students through different programs



A significant **achievement gap remains for students with disabilities**; Audubon has started to put systems/ structures in place to address this, but they are not yet operating highly effectively or sustainably



Uptown campus has **outgrown current facility, and space constraints impede learning**. Although Audubon has access to another building, expensive renovation is needed to make the space conducive to learning

# Assessment outcomes indicate the first step is quality; over the next 5 years, focus will be on improving/ codifying approach

Audubon will expand ACCESS for all New Orleans students via four levers:

1

## Improve quality of programming

*Improve, codify, and support implementation of highest quality programming at current campuses to close achievement gaps while maintaining high standards*

2

## Expand reach of network

*Replicate Gentilly model in 2 new elementary school campuses in New Orleans East and West Bank*

3

## Build pipeline of effective talent

*Evolve, gain accreditation, and enroll more prospective talent in the Montessori Training Center to better support current and future schools*

4

## Prepare young children for success

*Open an early childhood center that leverages the Montessori model to help students develop skills needed for success in elementary school*

## Why start here?

- Audubon's first priority is to provide access to a quality education for all students already enrolled across all classrooms, campuses, and programs by closing gaps
- Audubon must build a strong foundation to support sustainable expansion and effectively serve more students from across the community in the future

# Four strategic priorities will drive improvement and codification of programming

1

While maintaining heart of Audubon, strengthen academic program to support quality implementation and rigor

2


Design/ implement talent strategy to attract, develop, and retain effective instructional experts to support programming

3

Evolve governance structures to reflect network needs

4

Increase access to Audubon programs for students from all backgrounds



*Theory of Action:* If Audubon builds capacity for quality, rigor, & fidelity across programs, access will grow significantly

# Each priority will be realized via a defined set of initiatives

## (1 of 2)

1

While maintaining heart of Audubon, strengthen academic program to support quality implementation and rigor

- Further **codify academic frameworks**, including approach to **social-emotional learning and instructional differentiation**, to ensure program components are accessible to students with diverse learning needs
- **Identify academic and cultural performance metrics** aligned to framework as well as state accountability standards; monitor progress
- **Standardize and implement central data** collection/ reporting expectations to support quality across programs
- **Evolve systems and structures needed to support implementation** of codified framework and culture (student schedule, materials development, etc.)

2

Design and implement talent strategy that will attract, develop, and retain effective instructional experts

- Define **role** descriptions and target profile for new hires
- Fully leverage Montessori Training Center as pipeline for Montessori teachers and develop new **pipelines to support recruitment of other talent**
- Standardize **scope and sequence for professional learning** for all roles, aligned to codified academic framework
- Further develop **coaching capacity** in instructional leadership team, particularly around data to inform planning/ personalization
- Establish robust **leader development program** to ensure all are versed in mission/ vision, culture, and model implementation expectations

# Each priority will be realized via a defined set of initiatives

## (2 of 2)

3

Evolve governance structures to reflect network needs

- **Adjust organizational structure** to more effectively support implementation and accountability across network
- Systematically **update and seek input from board** members over course of plan implementation
- Revisit and adjust **board form and function** as needed in context of current state governance needs
- Ensure needs and perspectives of all **parent groups are considered equitably** in planning and governance

4

Increase access to Audubon programs for students from all backgrounds

- Clearly define and build **awareness/ understanding of unique value propositions of programs** across community by making information more accessible (e.g., online, at events held in different neighborhoods)
- Build and incorporate **supports for students from special populations** (e.g., ELL and SPED) into programming so they are able to fully engage
- **Elevate diversity of all types** (racial, socioeconomic, linguistic, cultural, and by ability and gender) **as an important part of Audubon's history and community** within school routines, rituals, and talent practices
- Adapt **student recruitment and enrollment practices** to lower perceived barriers to programs and reflect prioritization of diversity
- Ensure all students have access to conducive learning environment by building **fundraising capacity/ expertise** to support capital campaign/ grant funding for facilities



# Audubon Charter School

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Who We Are

Our Impact

Looking Forward

How We'll Get There

# Codified models & central shared services will ensure schools have support needed to implement with quality

## **Audubon's Network Model**

**Codified mission/ vision, culture, Montessori and French learning frameworks, and central student success profile** set consistent expectations for students and adults across schools and campuses

Shared **operations/ finance and recruitment systems** support consistent program execution across schools and campuses

Within this structure, schools have **freedom to innovate in how model is implemented:**

- Scope and sequence; content [within Montessori, French, and Bilingual Montessori frameworks]
- School level rituals and culture
- Family and community engagement
- Hiring and tailored professional development for teachers

**Future State Organizational Structure**

```

graph TD
    CEO[CEO] --> Academics[Academics]
    CEO --> Finance[Finance/Legal]
    CEO --> External[External Relations]
    CEO --> Operations[Operations]

    Academics --> Principal[Principal (3)]
    Academics --> Talent[Talent Development]
    Academics --> Learning[Learning Supports]

    Finance --> Special[Special Education]
    Finance --> Social[Social Emotional Learning]

    External --> HR[Human Resources]
    External --> Fundraising[Fundraising/Development]
    External --> Community[Community Engagement]
    External --> Enrollment[Enrollment]

    Operations --> Data[Data Management]
    Operations --> Facilities[Facilities]
    Operations --> Technology[Technology]

    Principal --> Instructional[Instructional Teams]
    Principal --> Student[Student Supports]

    Learning --> SpecialEd[Special Education]
    Learning --> SocialEmotional[Social Emotional Learning]

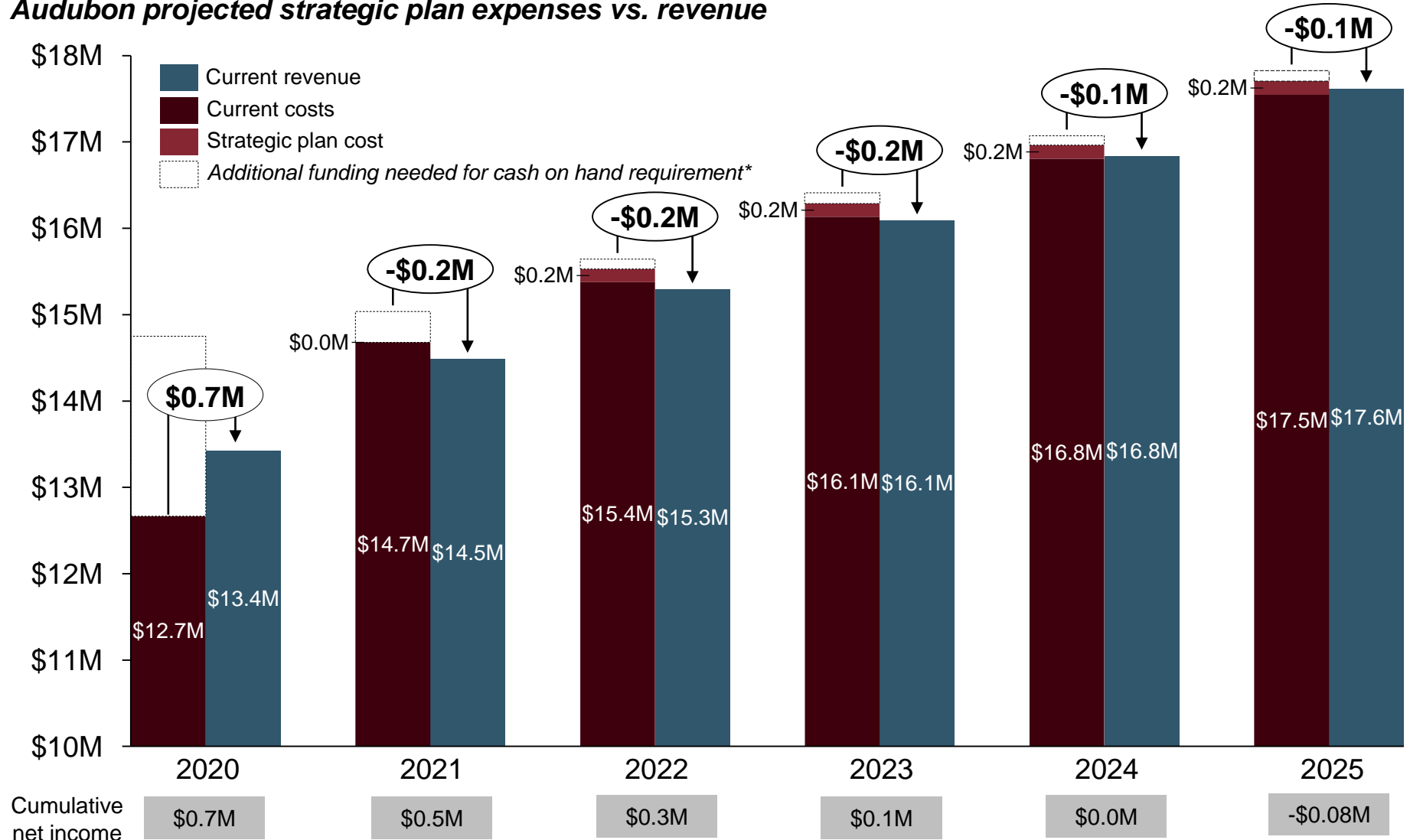
    Fundraising --> FundraisingNew[Fundraising/Development]
    Community --> CommunityNew[Community Engagement]
    Enrollment --> EnrollmentNew[Enrollment]
  
```

**KEY**

- Existing
- New role

# Implementation of full strategic plan would bring Audubon's total, 5-year philanthropic need to ~\$79,000

## Audubon projected strategic plan expenses vs. revenue



\* Note: Assumes 60 days cash on hand. Contributions to cash on hand not included in need calculation. Total contributions to cash on hand: ~\$2.9M

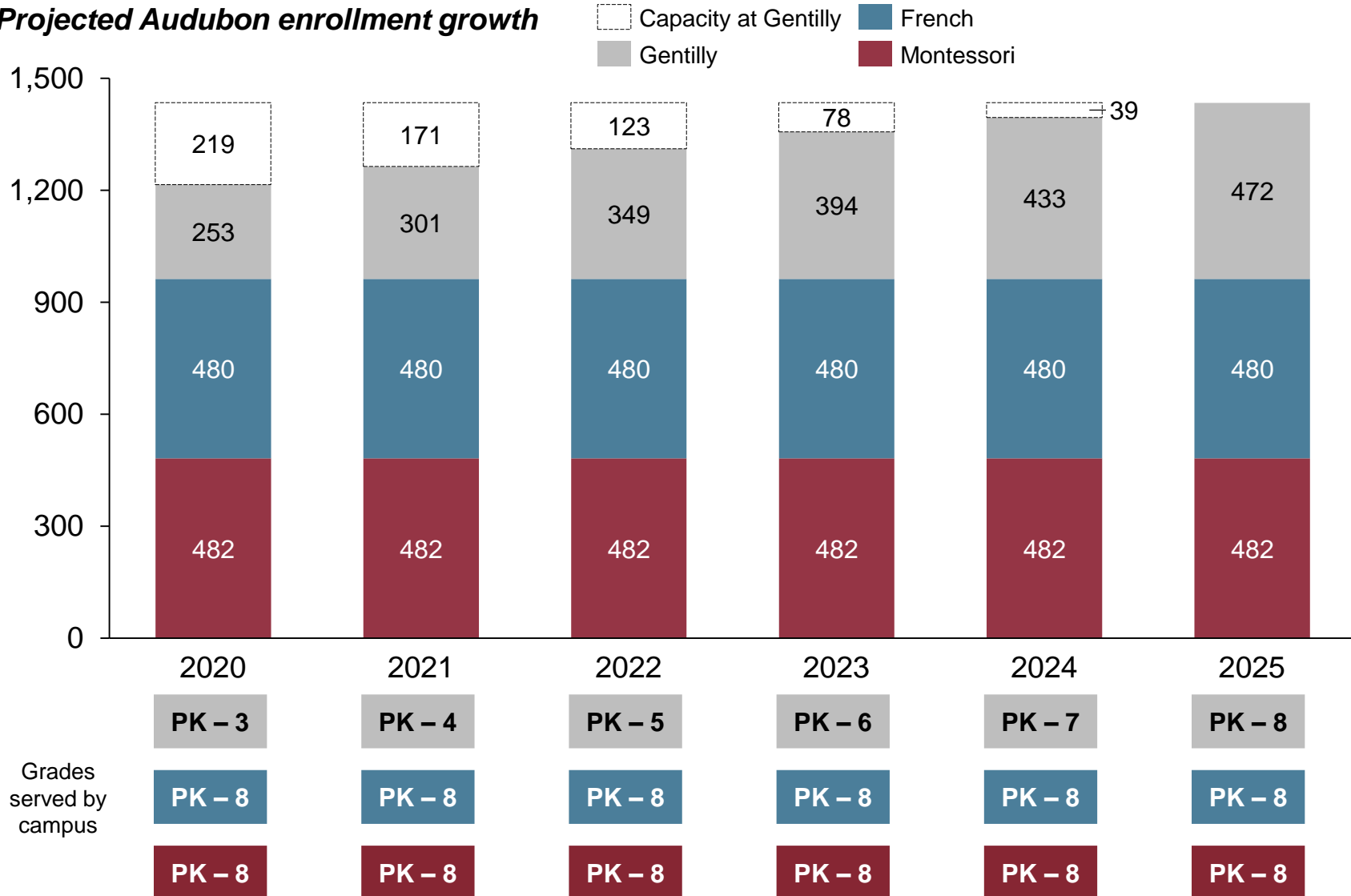
Source: Audubon Financial Model

Powered by BoardOnTrack

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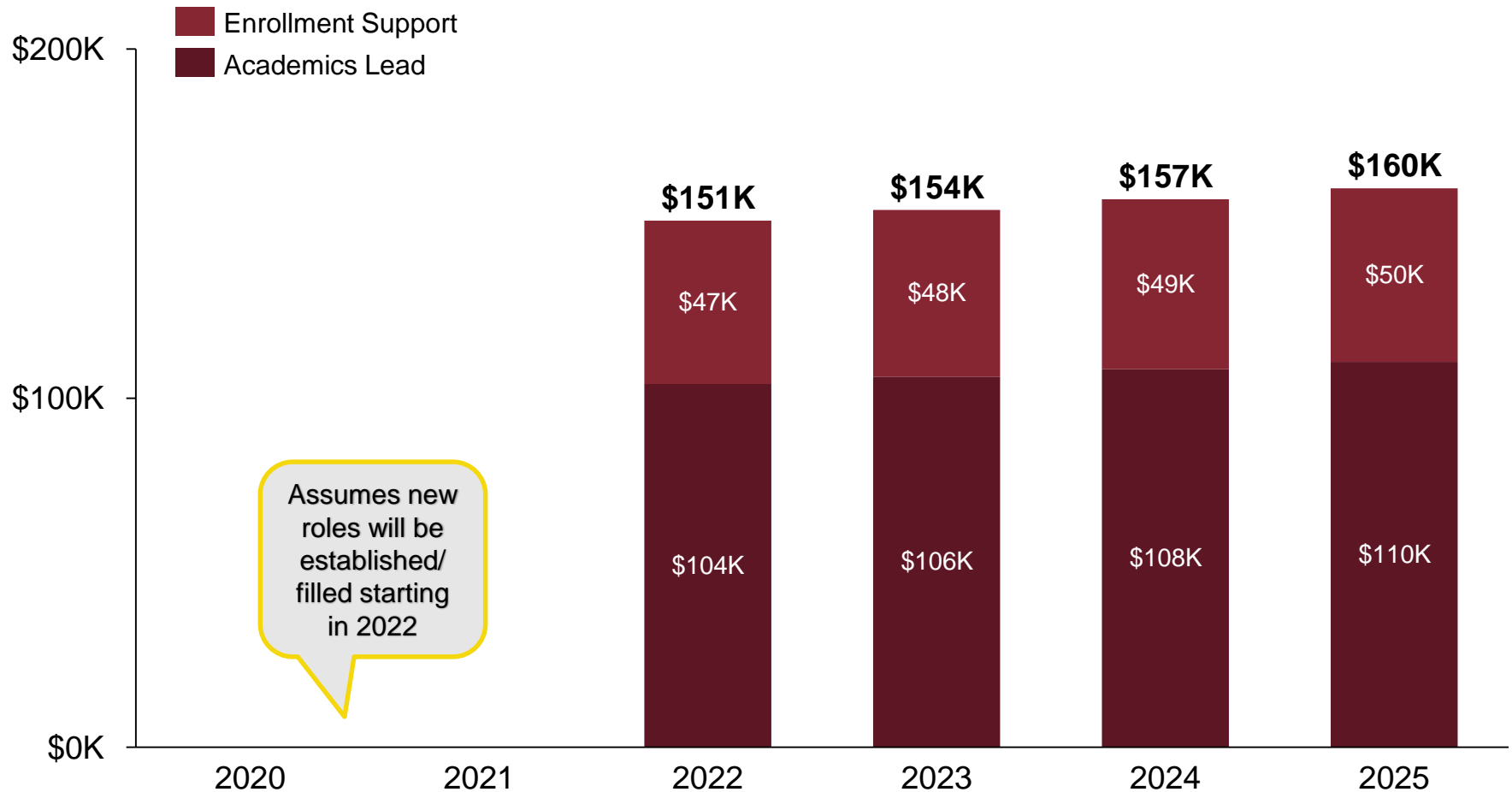
# ...until Gentilly achieves full enrollment and sustainability on the public dollar in 2025

## Projected Audubon enrollment growth



# Incremental need for plan reflects compensation for two new roles necessary for effective implementation

## Strategic plan expenses by initiative



# Financial Model Assumptions

## Enrollment and Staffing

- Model assumes constant enrollment year over year – i.e., that attrition will be backfilled
- At Gentilly, projected one new grade per year, starting with 4<sup>th</sup> grade in 2021 and ending with 8<sup>th</sup> grade in 2025

## Inflation

- Model assumes constant inflation of 2%. Revenues and expenses (excluding debt expense and depreciation) projected to grow by rate of inflation.

## Revenue

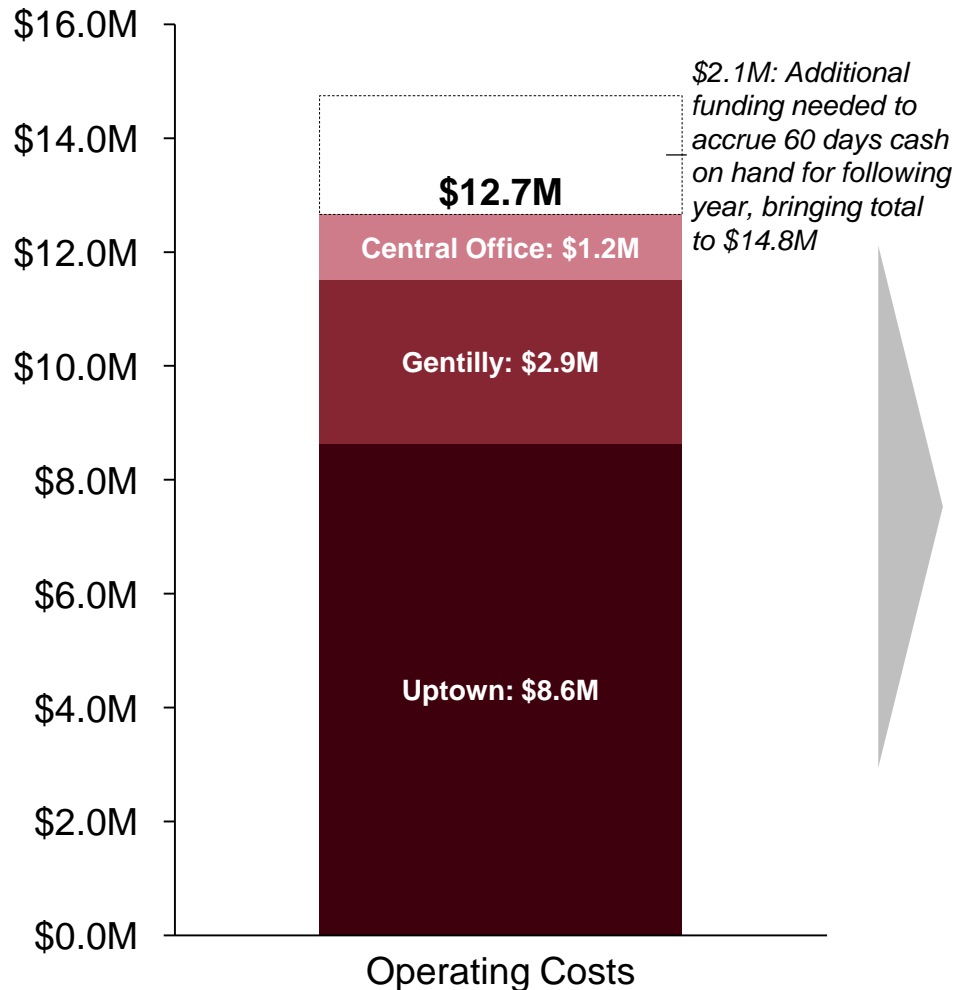
- Per pupil funding estimated based on current budget and enrollment
  - Minimum Foundation Program (MFP), Fees, income from meals, and student activity/ misc. revenue
  - Model assumes no per-pupil funding for scholarship program students
- Other revenues (e.g. grants, fundraising) estimated to grow by inflation

## Expenses

- Compensation (salaries/ benefits), food service, materials, and transportation estimated based on per pupil rates in current state
- Renovation expenses at Broadway and Banner campuses estimated at \$500K + \$500K = \$1M (does not include preschool campus expenses)
- Other expenses projected to grow by inflation

# Today, Audubon serves 1215 students in New Orleans with an annual budget of ~\$12.7M

## Projected Audubon operating cost categories, 2020



### Uptown

- Current enrollment: 962 students
- Per-pupil spending: ~\$9,300
- Salary + Benefits comprises ~80% (~\$6.7M) of school-level budget
- Other operating costs + facilities: ~20% (~\$1.9M)

### Gentilly

- Current enrollment: 253 students PK-3 (not yet fully enrolled)
- Per-pupil spending: ~\$11,400
- Salary + Benefits: ~60% (~1.7M) of school-level budget
- Other operating costs + facilities: ~40% (~\$1.2M)

### Central Office

- Salary + Benefits comprise ~85% (~\$1.0M) of central office budget
- Other operating costs + facilities: ~15% (~\$0.2M)



# Audubon is funded by three revenue streams – primarily ~\$10.7M in per-pupil funding

## Projected Audubon revenue streams, 2020



### Per Pupil

- Louisiana per pupil funding
  - **Minimum Foundation Program:** ~\$10M (~\$8,200 per pupil)
  - **Gifted & Talented + ELL funding** (K-8 only): ~\$0.3M
- **Fees**
  - 50% of PK3, PK4 families elect to pay tuition
  - ~\$0.4M total (\$5,400 per pupil)

### Philanthropy

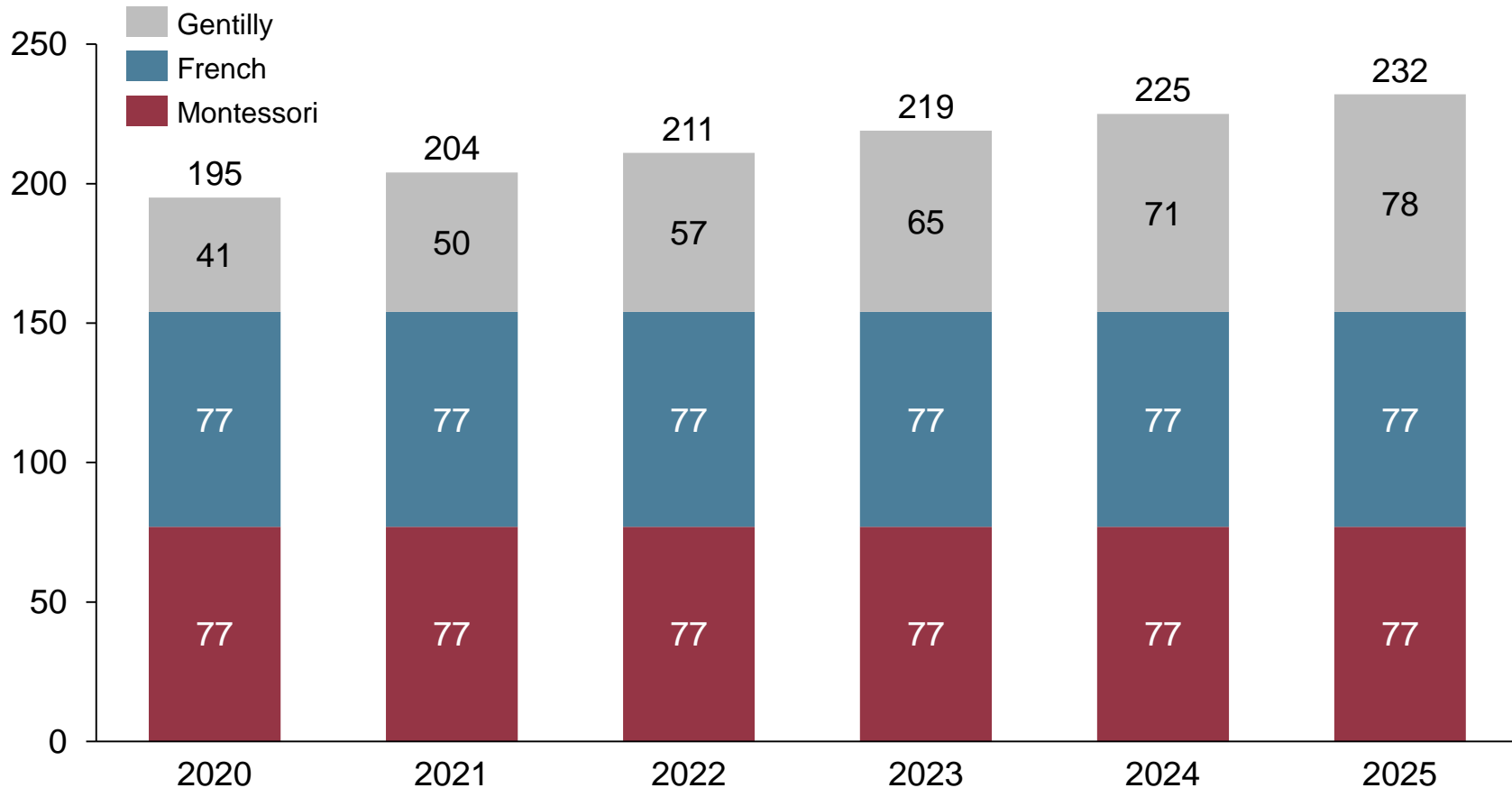
- Public grants and program funding:
  - **Grants:** ~\$1.0M
  - **Title funds:** ~\$0.3M
  - **IDEA B, HC, & CENF funding:** ~\$0.3M
  - **Child Nutrition Program funding:** ~\$0.4M

### Other Revenues

- **In kind donations** of teacher salary (~\$0.1M)
- Income from **meals, student activity & miscellaneous** revenue (~\$0.5M)

# Staffing\* will increase in tandem with enrollment at Audubon Gentilly

## Projected Audubon staffing growth



Staffing projected using school-level, per-pupil data Audubon reported to the state in 2018.

\*Staffing categories: Instructional staff, other instructional functions, pupil/instructional support, other support functions, school administration.

Sources: Audubon Financial Model, <http://louisianabelieves.com/data> Powered by BoardOnTrack

# Next Steps

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- Share identified plan priorities with school community for feedback
- Revise plan priorities based on feedback
- Devise action plans to accomplish identified strategic initiatives
- Implement action plans with periodic checkpoints

# Coversheet

## CEO Search Committee Update

<b>Section:</b>	III. Other Business
<b>Item:</b>	B. CEO Search Committee Update
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	CEO 2020 Posting.pdf



<b><u>Title:</u></b>	<b>Chief Executive Officer (CEO)</b>
<b><u>Employment Status:</u></b>	Full-time, EXEMPT
<b><u>Reports to:</u></b>	French and Montessori Education, Incorporated Board of Directors
<b><u>Location:</u></b>	Varies
<b><u>Position Summary:</u></b>	The Chief Executive Officer (CEO) of Audubon Schools will provide strategic vision, leadership, support and oversight of Audubon Schools. The CEO directly manages all members of the Senior Administration and School Principals. The CEO reports to and is the only employee of the French and Montessori Education, Incorporated (FAME) Board of Directors.

**The CEO is accountable for:**

- Collaborating with the FAME Board to develop organizational vision, priorities and goals
- Providing strategic leadership for organizational initiatives
- Ensuring high standards of achievement for students
- Ensuring a strong organizational culture
- Ensuring the maintenance and development of effective systems for managing resources

**ESSENTIAL FUNCTIONS**

**Work in Partnership with Governing Board (FAME)**

- Collaborate with the FAME Board to develop organizational vision, priorities and goals for the organization by facilitating the creation and implementation of strategic plans, business continuity plans, annual plans, budgets and improvement plans (as necessary) which outline action steps, timeline and needed resources that are in alignment with identified organizational priorities and core values
- Provide monthly updates to FAME Board on organizational progress/achievements and changes/updates/threats to law or policies which have implications for Audubon Schools
- Collaborate with Senior Administration to provide monthly updates to FAME Board on the academic, financial and operational health of Audubon Schools
- Provide recommendations to the FAME Board regarding organizational policies and contracts Serve as an advisor to the board and all subcommittees as requested
- Serve as the official signatory and representative of the organization as directed by the FAME board
- Assume other responsibilities as directed by the FAME Board including supporting and advising numerous affiliated entities

**Provide Strategic Leadership**

- Ensure that all stakeholders are aware of the mission, vision, core values and organizational priorities of Audubon Schools



- Align all organizational initiatives with the mission, vision, core values and organizational priorities of Audubon Schools
- Collaborate with Senior Administration and Instructional Leadership with input from stakeholders to develop recommended annual operating budgets
- Implement appropriate procedures, structures and systems to support the successful execution of all organizational initiatives and alignment with all relevant Federal, state, local and district laws and policies
- Ensure the integrity and continuity of the Audubon Schools brand by overseeing all communication, marketing and brand initiatives associated with FAME, Audubon Schools, Audubon Charter School, Audubon Charter Gentilly and any associated/affiliated organizations, clubs or groups
- Provide support and ensure accountability of all members of the Senior Administration and Instructional Leadership staff
- Conduct evaluations of assigned subordinates in accordance with all applicable federal, state, district, and CMO laws, policies, procedures and best practices
- Maintain effective working relationship with the charter authorizer, governing board and Greater New Orleans community
- Serve as an ambassador and advocate of the school community and its interests by representing the organization at local, state and national events

### **Ensure High Standards of Achievement for All Students**

- Collaborate with Instructional Leadership, Senior Administration and other stakeholders to develop a shared instructional vision which ensures success for all students
- Facilitate the allocation of resources to ensure that all school sites have the means to effectively implement curriculum which is aligned with Louisiana standards, the National French Curriculum and the American Montessori Society Standards as well as other best practices in instruction to meet the needs of all students
- Embrace a systematic use of formative assessment data to guide learning and drive instruction
- Facilitate the allocation of resources to ensure that Special Education and English Language Learner (ELL) programming remains in compliance with all relevant Federal, State and local laws and policies, to ensure success for all students
- Build extra-curricular and enrichment programs in the Arts and a variety of other disciplines which provide high quality offerings

### **Ensure A Strong Organizational Culture**

- Demonstrate a belief in the value of the Montessori and French instructional pedagogies as well as the benefit of Arts Education
- Encourage high expectations, supported through both verbal and nonverbal behaviors, for both teaching and learning
- Reflect and refine leadership based on feedback from others and self-reflection
- Encourage and model respectful talk, active listening and difficult conversations
- Acknowledge the diversity of the student population and their family backgrounds



- Cultivate positive two-way communication between school and families
- Create frequent opportunities for families to engage in the learning process
- Exhibit body language indicative of warmth and caring to all people
- Encourage and model politeness and support for all community members
- Encourage and model fairness in all interactions
- Establish high expectations for student achievement and behavior
- Place an emphasis on preparing students for a well-rounded life
- Partner with external organizations that enrich the culture of the school through service learning opportunities as well as life and cultural experiences
- Encourage the implementation of a student support system which addresses student academic and behavioral needs
- Regularly create opportunities for colleagues to work collaboratively to share and plan for student success
- Implement policies to ensure a safe and healthy environment for children and staff which adheres to all state and federal compliance mandates
- Provide a safe and clean environment for all
- Identify and mitigate potential liability issues for the organization

#### **Ensure Strong Systems for Managing Resources**

- Collaborate with FAME Board Finance Committee and the Chief Financial Officer (CFO) to ensure proper financial policies and controls are implemented for Audubon Schools in adherence to all applicable Federal, State, district and local laws and policies
- Provide regular monitoring of the fiscal health of the organization
- Oversee facilities, fixed assets and capital improvements
- Oversee student and personnel data management
- Collaborate with the Director of Operations (DO) to develop and implement an admissions strategy to successfully recruit students to Audubon Schools in compliance with all Federal, State, district and Audubon Schools laws, policies and procedures
- Collaborate with the Director of Development (DD) to develop and implement a fundraising and development strategy which will help to support operational funding gaps and special projects of Audubon Schools

#### **Required Qualifications:**

- Masters Degree or higher from a regionally accredited college or university in a relevant discipline
- Certification as a Principal/Education Leader I or II
- Three years successful administrative experience at the assistant principal level or above
- Three years of experience managing organizational resources and budgets including preparation of the same
- Proven track record in institutional advancement including fundraising and development



**Desired Qualifications:**

- Ph.D or Ed.D from a regionally accredited college or university in a relevant discipline
- Certification as a Principal/Education Leader III
- Experience leading in a Montessori or French School
- Seven years successful teaching experience at the elementary or middle school level
- Five years successful school administration and/or central office experience
- National Board Certification
- Ability to speak French fluently
- Administrative experience in a charter school environment
- Proven leadership in institutional advancement
- Knowledgeable of the New Orleans educational landscape

**Needed Skills:**

- Exceptional verbal, written communication skills
- Strong analytical skills
- Outstanding program management and professional development skills
- Ability to work with diverse constituencies
- Experience dealing with large budgets
- Experience in grant writing
- Understanding of curriculum design and implementation
- Grasp of special education procedures
- Knowledge of current state and federal laws pertaining to schools
- Experience with accreditation processes
- Ability to interpret data and align instruction accordingly



# Coversheet

## Training Center Update

<b>Section:</b>	IV. CEO's Report
<b>Item:</b>	B. Training Center Update
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	NMTC in New Orleans EC Initial Certificate.pdf NMTC in New Orleans EL I Initial Certificate.pdf

# THE MONTESSORI ACCREDITATION COUNCIL FOR TEACHER EDUCATION

grants

## The National Montessori Training Center in New Orleans

428 Broadway St., New Orleans, Louisiana 70118

the status of

# Full Accreditation (Initial)

to

**April 23, 2027**

for its

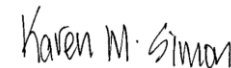
**Early Childhood**

**AMS Montessori Teacher Education Certification Program**

*Based upon submission of an acceptable Interim Report, no later than October 23, 2024*



Rebecca Pelton, Ed.D., President



Karen Simon, Chairperson

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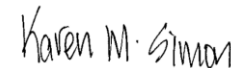
**Elementary I**

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Rebecca Pelton, Ed.D., President



Karen Simon, Chairperson