



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

### Virtual Finance Committee Meeting

---

#### Date and Time

Thursday July 2, 2020 at 5:00 PM CDT

#### Location

Virtual Zoom Meeting

---

Topic: Virtual Finance Committee Meeting

Time: July 2, 2020 05:00 PM Central Time (US and Canada)

Join Zoom Meeting

<https://zoom.us/j/98291227048?pwd=Wmo4RFZqbKREaHhJNkZFVkJRuYTlydz09>

Password: 297337

---

#### Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>5:00 PM</b>
Opening Items			
<b>A.</b> Introduction of the new Chief Financial Officer		Calvin Tregre	2 m
• Welcome of Ms. Kendal Turner			
<b>B.</b> Record Attendance and Guests		Calvin Tregre	1 m

	Purpose	Presenter	Time
<b>C. Call the Meeting to Order</b>		Calvin Tregre	
<b>D. Approve Minutes from May 28, 2020</b>	Approve Minutes	Calvin Tregre	3 m

**II. Financial Reports****5:06 PM**

<b>A. Update on Tax Credits</b>	FYI	Justin Anderson	5 m
<b>B. Financial Statements for May 31, 2020</b>	FYI	Justin Anderson	30 m
<b>C. Preliminary Budget for 2020-21</b>	FYI	Justin Anderson	30 m

**III. Other Business****6:11 PM**

<b>A. Proposed Contract for Bus Transportation Services</b>	Vote	Kendal Turner	5 m
<b>B. Proposed Revisions to the Policies and Procedures</b>	Vote	Kendal Turner	10 m
<b>C. Proposed Pay Period Changes</b>	Vote	Kendal Turner	5 m
<b>D. Contract Renewals for Pest Control &amp; Termites Control</b>	FYI	Kendal Turner	5 m

**Brans Pest Control**

Broadway Campus annually	Pest Control	\$230 month	Termite Control	\$1,800
Gentilly Campus annually	Pest Control	\$250 month	Termite Control	\$1,960
Milan Campus annually	Pest Control	\$195 month	Termite Control	\$1,824

**IV. Closing Items****6:36 PM**

<b>A. Announcements</b>	FYI	Calvin Tregre	2 m
-------------------------	-----	---------------	-----

1. First Budget Hearing on July 11, 2020 at 9:00am.
2. Budget Adoption scheduled on July 11, 2020 at 10:00am Board meeting.
3. Next Finance Committee meeting on August 18, 2020 at 5:30pm.

	Purpose	Presenter	Time
<b>B. Adjourn Meeting</b>	Vote		

# Coversheet

## Approve Minutes from May 28, 2020

<b>Section:</b>	I. Opening Items
<b>Item:</b>	D. Approve Minutes from May 28, 2020
<b>Purpose:</b>	Approve Minutes
<b>Submitted by:</b>	
<b>Related Material:</b>	2020_05 28_finance_committee_meeting_minutes__1_.docx





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

## Finance Committee Meeting

### Minutes

---

#### **Date and Time**

Tuesday, May 28, 2020 6:00 PM CST

#### **Location**

Virtual meeting via zoom

---

#### **I. Opening Items**

##### **A. Record Attendance and Guests**

<b>Name</b>	<b>Position</b>	<b>Present/Absent</b>
Calvin Tregre	Board Member, 2020	Present
Melissa Russell	Board Member, 2020	Absent
Harold LeBlanc	Community Member	Present
Jorge Perez	Community Member	Present
Cristine Coleman	Parent Member	Absent
Justin Anderson	CFO	Present
Latoya Brown	CEO	Absent
Javier Jalice	Board, Chair	Absent

**B.** The meeting was called to order at 6:00p.m. A quorum was present as indicated above.

#### **II. Financial Business**

- A.** Mr. Anderson presented the financial statements for the period ended April 30, 2020. The said financial statements are attached, herewith, as a part of the minutes. As of April 30, 2020 expenditures exceeded revenues by \$1,481,832. Revenues were 79% of the budget, and expenditures were 91% of the budget. The best available estimate at this time is that we could end the fiscal year with a deficit of approximately \$400,000.
- B.** The committee reviewed the preliminary budget for 2020-21. The budget was still under development while waiting for additional funding information from the OPSB.

#### **III. Other Business**

- A.** The committee unanimously agreed to recommend to the Board that the proposed contract with Young Audiences be accepted and approved.

The committee unanimously agreed to recommend to the Board that the proposed Policy for IT Procedures be accepted and approved.

The committee received and reviewed the Form 990 for the fiscal year ended June 30, 2019.

#### **IV. Closing Item**

- A.** The next Finance Committee was scheduled for June 16, 2020.
- B.** The meeting was adjourned at approximately at 7:30pm.

# Coversheet

## Update on Tax Credits

<b>Section:</b>	II. Financial Reports
<b>Item:</b>	A. Update on Tax Credits
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	AudubonFAME-1_Parker Wire Amounts_6-23-20 FINAL.pdf Scan Jun 23, 2020 at 4.47 PM (1).pdf



# Schedule for Final Wire Amounts

Parker-Hannifin Purchase of Y2019 LA SHTCs from FAME - Per PSA dated June 18, 2020

Credit Basis Computation			
Project:	<b>FAME - Gentilly Terrace School</b>		
	QREs		<b>1,988,794</b>
Credit Value Assumptions			
			State Historic Tax Credits
	LA SHTC:	20.00%	397,759
	Price/Value	90.00%	357,983
	Credit Value (before expenses)		<b>357,983</b>
CGC ARRANGER FEE CALCULATION			
		-	
	LESS: Moss Adams Fee (2% of total credit awarded)		(7,955)
	Gross SHTC sale proceeds to FAME		<b>350,028</b>
	Crescent Growth Capital Arranger Fee:	10,501	
	(3% of Gross SHTC sale proceeds)		
	100% of Total Credit Awarded by LDR sold by FAME to Parker-Hannifin		
	<b>RESULTING WIRE AMOUNTS ARE AS FOLLOWS (See next page):</b>		
	<b>WIRE AMOUNTS FROM PARKER-HANNIFIN:</b>		
	TO: Moss Adams		7,955
	TO: Crescent Growth Capital (Arranger Fee)		10,501
	TO: FAME (Gross SHTC Sale Proceeds LESS Arranger Fee)		<b>339,527</b>

		<b>WIRE INSTRUCTIONS:</b>		
		<b>Name of Account: Moss Adams</b>		
		<b>Amount: \$7,955</b>		
		<b>Bank:</b>		
		<b>ABA:</b>		
		<b>Acct#:</b>		
		<b>Reference:</b>		
		<b>Name of Account: Crescent Growth Capital, LLC</b>		
		<b>Amount: \$10,501</b>		
		<b>Bank: Chase Bank</b>		
		<b>ABA: 065400137</b>		
		<b>Acct#: 773600150</b>		
		<b>Reference: Audubon Gentilly - CGC Arranger Fee</b>		
		<b>Name of Account: FAME</b>		
		<b>Amount: \$339,527</b>		
		<b>Bank: Hancock Whitney</b>		
		<b>ABA: 065000171</b>		
		<b>Acct#: 0061523384</b>		
		<b>Reference: SHTC sale proceeds (Gentilly Phase I)</b>		



June 23, 2020

Louisiana Department of Revenue  
ATTN: Haley David/Taxpayer Compliance  
617 N. Third Street  
Baton Rouge, LA 70802

**RE: Transfer of Tax Credits from FAME to Parker-Hannifin  
Form 6140 for LA DHP/SHPO Project #2113; Payment for Transfer**

Dear Ms. David:

Please find enclosed one fully executed LDR Form 6140 providing for the transfer to Parker-Hannifin Corporation of \$397,759 in tax credits registered on March 5, 2020 to French and Montessori Education, Inc. ("FAME"). Enclosed too is the current Form 6135, issued to FAME, as well as one cashier's check, for \$200, made out to LDR to pay for this transfer.

Pursuant to your regulations, I am also attaching the Purchase and Sale Agreement of June 18, 2020 between Parker-Hannifin and FAME providing for the transfer from FAME of the \$397,759 in issued Y2019 tax credits.

Kindly email the Form 6135 registering the transfer of \$397,759 in credits to Parker-Hannifin Corporation to Terence Valencic, Jr. ([terence.valencic@parker.com](mailto:terence.valencic@parker.com)) at Parker-Hannifin:

Terry Valencic  
Senior Manager, State and Local Tax  
Parker-Hannifin Corporation  
6035 Parkland Blvd  
Cleveland, OH 44124

Mr. Valencic may be reached at (216) 896-3341, if necessary.

~ [www.crescentgrowthcapital.com](http://www.crescentgrowthcapital.com) ~

Best regards,

A handwritten signature in blue ink, appearing to read 'Frank Rabalais', is positioned above the printed contact information.

Frank Rabalais, MPS, MBA

Director & Historic Preservation Specialist

Crescent Growth Capital, LLC

201 St. Charles Avenue, Suite 4205

New Orleans, LA 70170

Work: (504) 378-3471

Cell: (504) 495-4060

[frank.rabalais@crescentgrowthcapital.com](mailto:frank.rabalais@crescentgrowthcapital.com)

[www.crescentgrowthcapital.com](http://www.crescentgrowthcapital.com)

**Encl: Form 6140, Form 6135, Purchase & Sale Agreement, Check for \$200**



# LOUISIANA

## DEPARTMENT of REVENUE

**Credit Utilization Form**  
Pursuant to the provisions of  
Louisiana Revised Statutes 47:1524

**For transfers, mail to:**  
Louisiana Department of Revenue  
Attn: Tax Credit Registry  
P.O. Box 1071  
Baton Rouge, LA 70821

**Tax Credit Number**

1 9 0 1 6 7 4 9 6

**Section 1:** To transfer your credit to the State, complete the section below, sign and submit this form, a copy of your Credit Registration Form (R-6135), and the applicable transfer fee to LDR.

Amount of Credit to be Sold to Louisiana	\$
--	----

**Section 2:** To utilize your credit on your tax return, complete the section below, sign and attach this form and a copy of your Credit Registration Form (R-6135) to your tax return.

Tax Period	Amount of Credit Claimed on Return	\$
Remaining Credit Balance		\$



**Section 3:** To transfer your credit to another party, including a flow-through, complete the section below. **Both the transferor and transferee must sign the form.** Submit this form, a copy of your Credit Registration Form (R-6135), a copy of the contract of sale (except for flow-through), and any applicable transfer fees to LDR within 10 days of the transfer.

Transferor's Credit Balance Prior to Transfer	\$ 397,759.00
Amount of Credit Being Transferred	\$ 397,759.00
Transferor's Credit Balance after Transfer	\$ 0.00
Date of Transfer 06/19/2020	Transferee LDR Account ID 0989533
Transferee Address 6035 Parkland Blvd, Cleveland, OH 44124	Transferee Name Parker-Hannifin Corporation
Price Paid by the Transferee to the Transferor	\$ 357,983.00

### Instructions

- A transfer is not effective until it is recorded in the Tax Credit Registry.
- Only one Credit Registration Form (R-6135) can be attached to this form. A separate Credit Utilization Form (R-6140) will need to be completed for each Credit Registration Form (R-6135).
- Only one transferee can be listed on this form. A separate Credit Utilization Form (R-6140) will need to be completed for each transferee.
- The sale or transfer of tax credits may have income tax consequences for the transferor and transferee. Consult your tax advisor.
- To utilize a purchased credit to pay an outstanding liability, attach a copy of your Credit Registration Form (R-6135) to a completed Transferable Credit Payment Voucher, Form R-6170, and submit both to LDR.

By signing below, I certify that I am an authorized representative of the transferor or transferee and as such am authorized to make the statement of affirmation contained herein. I certify under penalties of perjury that the above statements, information contained in this document and attachments are complete, true, and correct to the best of my knowledge and belief. By signing below as the transferor, I further certify that I have not previously transferred or claimed above referenced credits and agree to be subject to recapture and collection procedures authorized under Title 47 of the Louisiana Revised Statutes in the event that I have transferred credits that I do not own.

Signature of Transferor 	Print Name Latoye A. Brown	Date (mm/dd/yyyy) 6/24/20
Signature of Transferee 	Print Name TERENCE VALENCIC JR.	Date (mm/dd/yyyy) 06/22/2020
Signature of Broker	Print Name	Date (mm/dd/yyyy)





84-487  
1111

# CASHIER'S CHECK

9105085033

DATE 06/23/2020

ISSUING REGION 081

BRANCH Eastover

BRANCH DID 41424

1 NO HUNDRED DOLLARS AND 00 CENTS

PAY TO THE  
ORDER OF

\*\*\*\*\* LOUISIANA DEPARTMENT OF REVENUE \*\*\*\*\*

\$ 200.00

Drawer: Capital One, N.A.

RE: LATOYA A BROWN

F.A.N.E. INC

Hishoe Tax Credit

AUTHORIZED SIGNATURE

Read the reverse side for important information on the reissuance of lost, destroyed, or stolen cashier's check. This check may not be replaced until after the 90th day of issue.

THE BACK OF THIS DOCUMENT CONTAINS AN ARTIFICIAL WATERMARK - HOLD AT AN ANGLE TO VIEW



# Coversheet

## Financial Statements for May 31, 2020

<b>Section:</b>	II. Financial Reports
<b>Item:</b>	B. Financial Statements for May 31, 2020
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	2005 ACS Financial Statement DRAFT..pdf

**FRENCH AND MONTESSORI EDUCATION INCORPORATED**

**Financial Statements**

**For the Month Ended May 31, 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.

## Contents

---

Statement of Financial Position	1
Statement of Activities and Change in Net Assets and Budget Comparison for the eleven months ended May 31, 2020	2
Statement of Activities and Change in Net Assets and Budget Comparison for the eleven months ended May 31, 2020	3
Statment of Cash Flows for the period ended May 31, 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 MAY 31 2020**

**ASSETS****CURRENT ASSETS**

Cash and cash equivalents	\$ 2,397,067
Accounts receivable	648,822
Investments	1,002,029
Prepaid expenses and other current assets	<u>18,845</u>

Total current assets 4,066,763

PROPERTY AND EQUIPMENT, net 3,794,776

**TOTAL ASSETS \$ 7,861,539**

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

Accounts payable and accrued expenses	\$ 122,420
Accrued salaries and benefits payable	1,005,675
Deferred revenues	<u>61,582</u>

Total current liabilities 1,189,677

**LONG TERM LIABILITIES**

Note Payable 4,075,865

Total long term liabilities 4,075,865

**NET ASSETS**

Unrestricted net assets 2,595,995

**TOTAL LIABILITIES AND NET ASSETS \$ 7,861,539**

**FRENCH AND MONTESSORI EDUCATION INCORPORATED  
D/B/A AUDUBON CHARTER SCHOOL  
STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS AND BUDGET COMPARISON  
FOR THE ELEVEN MONTHS ENDED MAY 31, 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	\$ 7,277,903	\$ 1,628,716	\$ -	\$ 8,906,619	99%
Fee revenues	171,475	93,659	-	\$ 265,134	71%
Public grants and program funding	1,012,681	181,597	-	\$ 1,194,278	58%
Private grants and donations	254,227	57,278	-	\$ 311,505	55%
Income from investments	61,140	540	-	\$ 61,680	411%
Other income	399,456	53,675	-	\$ 453,131	89%
Released from restrictions				-	
Total revenues and support	9,176,882	2,015,465	-	\$ 11,192,347	87%
<b>EXPENSES</b>					
Salaries	\$ 5,946,975	\$ 1,563,562	\$ 652,675	\$ 8,163,212	111%
Benefits	1,757,236	216,082	218,573	\$ 2,191,891	99%
Disposal	11,658	3,723	-	\$ 15,381	67%
Dues	36,606	8,186	14,352	\$ 59,144	49%
Food service	193,429	64,488	-	\$ 257,917	57%
Insurance	171,357	25,658	-	\$ 197,015	86%
Materials	168,264	32,952	12,542	\$ 213,758	51%
Purchased services	865,427	194,312	69,819	\$ 1,129,558	118%
Rentals	24,432	-	268	\$ 24,700	97%
Repairs and maintenance	192,035	93,428	-	\$ 285,463	128%
Travel	41,755	1,301	227	\$ 43,283	97%
Utilities	150,578	36,201	-	\$ 186,779	75%
Depreciation	67,136	91,689	-	\$ 158,825	91%
Other expenses	9,426	555	2,736	\$ 12,717	57%
Debt Service	1,956	106,418	-	\$ 108,374	82%
Student Transportation	70,240	92,170	-	\$ 162,410	82%
Total expenses	9,708,510	2,530,725	971,192	13,210,427	103%
<b>CHANGE IN NET ASSETS</b>	<b>\$ (531,628)</b>	<b>\$ (515,260)</b>	<b>\$ (971,192)</b>	<b>\$ (2,018,080)</b>	
NET ASSETS - Beginning of period				4,614,075	
<b>NET ASSETS - End of period</b>				<b>\$ 2,595,995</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.

# Coversheet

## Preliminary Budget for 2020-21

<b>Section:</b>	II. Financial Reports
<b>Item:</b>	C. Preliminary Budget for 2020-21
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	20-21 BUDGET Preliminary.pdf

REVENUE	UPTOWN	GENTI LLY	CENTRAL OFFI CE	TOTAL
MFP	\$ 7,757,626	\$ 2,172,380		\$ 9,930,006
Fee Revenue (tuition)	\$ 214,200	\$ 158,100		\$ 372,300
Title Funds and Strong Start	\$ 454,525	\$ 110,921		\$ 565,446
I DE A B & H.C. & CENF	\$ 147,383	\$ 48,528		\$ 195,911
Child Nutrition Program	\$ 150,000	\$ 57,500		\$ 207,500
CODOFIL & Escadrille	\$ 465,000	\$ 46,000		\$ 511,000
EEF	\$ 34,601			\$ 34,601
LA 4	\$ 135,000	\$ 78,000		\$ 213,000
Fundraising and Grants	\$ 105,000	\$ 10,000		\$ 115,000
In-kind Donation of salaries	\$ 86,000	\$ 43,000		\$ 129,000
Income from investments	\$ 15,000			\$ 15,000
Income from meals	\$ 15,000	\$ 7,000		\$ 22,000
Student Activity & Msc Revenue	\$ 212,500	\$ 25,000		\$ 237,500
Released from Restrictions				\$ -
<b>TOTAL REVENUE</b>	<b>\$ 9,791,835</b>	<b>\$ 2,756,429</b>	<b>\$ -</b>	<b>\$ 12,548,264</b>
<b>EXPENSES</b>				
<b>SALARI ES</b>	<b>\$ 5,338,372</b>	<b>\$ 1,633,930</b>	<b>\$ 574,283</b>	<b>\$ 7,546,585</b>
<b>BENEFIT S</b>	<b>\$ 1,498,636</b>	<b>\$ 231,120</b>	<b>\$ 172,285</b>	<b>\$ 1,902,041</b>
<b>DI SPOSAL</b>	<b>\$ 15,000</b>	<b>\$ 6,000</b>	<b>\$ -</b>	<b>\$ 21,000</b>
<b>DUES</b>				
Discretionary Dues	\$ 13,260	\$ 3,740	\$ 2,500	\$ 19,500
GNOCOS	\$ 19,500	\$ 5,500		\$ 25,000
	<b>\$ 32,760</b>	<b>\$ 9,240</b>	<b>\$ 2,500</b>	<b>\$ 44,500</b>
<b>FOOD SERVI CE</b>	<b>\$ 275,000</b>	<b>\$ 100,000</b>		<b>\$ 375,000</b>
<b>I NSURANCE</b>	<b>\$ 225,000</b>	<b>\$ 67,500</b>		<b>\$ 292,500</b>
<b>MATERI ALS</b>				
DISCRETIONARY	\$ 50,000	\$ 15,000	\$ 3,050	\$ 68,050
INSTRUCTIONAL SUPPLIES	\$ 20,250	\$ 39,060	\$ 30,837	\$ 90,147
TECH LICENSES AND SUPPLIES			\$ 57,959	\$ 57,959
M SC STUDENT ACTIVITY SUPPLIES	\$ 5,000	\$ 2,000		
INSTRUCTIONAL TECHNOLOGY				\$ -
CUSTODIAL SUPPLIES & TECH	\$ 25,000	\$ 12,500		\$ 37,500
	<b>\$ 100,250</b>	<b>\$ 68,560</b>	<b>\$ 91,846</b>	<b>\$ 260,656</b>
<b>PURCHASED SERVI CES</b>				
OPSB ADMINI STRATIVE FEE	\$ 155,153	\$ 43,448		\$ 198,600
IN-KIND DONATION SALARIES	\$ 86,000	\$ 43,000		\$ 129,000
SECURITY	\$ 50,000			\$ 50,000
STUDENT ACTIVITY	\$ 105,000	\$ 10,500		\$ 115,500
TECHNOLOGY & MANAGEMENT	\$ 4,500		\$ 52,212	\$ 56,712
PAYROLL PROCESSING			\$ 52,000	\$ 52,000
CONTRACTED SPED	\$ 200,000	\$ 65,000		\$ 265,000
ACCOUNTING, LEGAL, FEES	\$ 12,500	\$ 6,000	\$ 49,500	\$ 68,000
OUTSOURCED CURRICULUM & TRAINING	\$ 10,360	\$ 87,500		\$ 97,860
CONTINGENCY	\$ 50,000	\$ 10,000		\$ 60,000
	<b>\$ 673,513</b>	<b>\$ 265,448</b>	<b>\$ 153,712</b>	<b>\$ 1,092,672</b>

<b>RENTALS</b>					
COPIER RENTAL	\$	20,000			\$ 20,000
BUILDING RENTALS	\$	1,500	\$ 1,000	\$ 2,500	\$ 5,000
	\$	<b>21,500</b>	\$ <b>1,000</b>	\$ <b>2,500</b>	\$ <b>25,000</b>
<b>REPAIRS AND MAINTENANCE</b>					
	\$	<b>176,033</b>	\$ <b>97,169</b>		\$ <b>273,202</b>
<b>TRAVEL</b>					
	\$	<b>50,000</b>	\$ <b>2,500</b>	\$ <b>5,000</b>	\$ <b>57,500</b>
<b>UTILITIES</b>					
ELECTRICITY & GAS	\$	127,000	\$ 35,000		\$ 162,000
COMMUNICATIONS	\$	48,500	\$ 9,000		\$ 57,500
	\$	<b>175,500</b>	\$ <b>44,000</b>		\$ <b>219,500</b>
<b>DEPRECIATION</b>					
	\$	<b>75,000</b>	\$ <b>105,000</b>		\$ <b>180,000</b>
<b>OTHER EXPENSES</b>					
MISC STUDENT ACTIVITY PASS THROUGH	\$	<b>12,500</b>	\$ <b>1,000</b>	\$ <b>2,500</b>	\$ <b>16,000</b>
<b>DEBT SERVICE</b>					
	\$	<b>3,000</b>	\$ <b>135,000</b>	\$ <b>-</b>	\$ <b>138,000</b>
<b>TRANSPORTATION</b>					
BUS SERVICE	\$	35,000	\$ 200,000		\$ 235,000
STUDENT FIELD TRIPS	\$	25,000	\$ 4,500		\$ 29,500
	\$	<b>60,000</b>	\$ <b>204,500</b>		\$ <b>264,500</b>
<b>TOTAL EXPENSES</b>					
	\$	<b>8,732,064</b>	\$ <b>2,971,967</b>	\$ <b>1,004,626</b>	\$ <b>12,708,657</b>
<b>SURPLUS ( DEFECIT )</b>					
	\$	<b>1,059,771</b>	\$ <b>(215,538)</b>	\$ <b>(1,004,626)</b>	\$ <b>(160,393)</b>



**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	1,386,509	340,949	-	1,727,458	2,057,780	-16%	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>9,791,835</b>	<b>2,756,429</b>	<b>-</b>	<b>12,548,264</b>	<b>12,849,554</b>	<b>-2%</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	673,513	265,448	153,712	1,092,672	957,212	14%	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>8,732,064</b>	<b>2,971,967</b>	<b>1,004,626</b>	<b>12,708,657</b>	<b>12,849,554</b>	<b>-1%</b>	<b>13,035,881</b>
<b>Surplus (Defecit)</b>	<b>\$ 1,059,771</b>	<b>\$ (215,538)</b>	<b>\$ (1,004,626)</b>	<b>\$ (160,393)</b>	<b>\$ 0</b>		<b>\$ 1,868,399</b>

# Coversheet

## Proposed Contract for Bus Transportation Services

<b>Section:</b>	III. Other Business
<b>Item:</b>	A. Proposed Contract for Bus Transportation Services
<b>Purpose:</b>	Vote
<b>Submitted by:</b>	
<b>Related Material:</b>	Audubon Charter Schools RFP.pdf B&L Transportation Supporting Documents.pdf

# **B&L Transportation, Inc.**

## **RFP Prepared For:**



**B&L TRANSPORTATION, INC.**  
**2930 FRENCHMEN STREET**  
**NEW ORLEANS, LA 70122**  
**(985) 798-7011**

## **Table of Contents**

	<b>Page</b>
1) Company Information	3
2) Performance, Turnover, Accident History	5
3) Resumes	6
4) References	7
5) Current Accounts	8
6) Buses and Bus Drivers	9
7) Routing, GPS, Parent App, Video System	11
8) Maintenance Program	15
9) Driver Safety, Training Program, Student Safety	16
10) Routing Services	18
11) Pricing	19
12) Supporting Documentation	23

## Company Information

- **Business Name:** B&L Transportation, Inc
- **Owners:** Leslie and William Schwertz
- **Year Founded:** 1990
- **Home Office:** 485 W 23rd St, Larose, La 70373
- **New Orleans Location:** 2930 Frenchmen St New Orleans, La 70122
- **New Orleans Operation Started:** 2019
- **Business Phone:** 985-798-7011
- **Business Web Address:** <https://b-ltransportation.com/>
- **Contact Person:** John Livaccari
- **Contact Person Title:** Operation Manager
- **Contact Person Phone:** 504-460-7127
- **Contact Person Email:** [jlivaccari@bellsouth.net](mailto:jlivaccari@bellsouth.net)

## B&L Transportation

### Company Information

B&L Transportation is a locally owned and operated school bus provider based in Lafourche Parish. B&L Transportation was formed in 1990 to provide school bus transportation for Holy Rosary Catholic School in Larose and E.D. White Catholic High School in Thibodaux for the areas not serviced by Lafourche Parish school buses. For these programs we were responsible for all aspects of transportation. We provided buses, drivers, fuel, maintenance, and insurance. We also scheduled the routes for the buses we provided to these schools. We presently provide bus transportation for the Lafourche Parish School Board. This contract began in 2002. We presently operate over 130 buses in Lafourche Parish.

B&L Transportation entered the New Orleans Area in 2019 and provides bus service for Fannie C. Williams School, Foundation Prep School and Homer Plessy School. We also provide school buses to St. John the Baptist School Board, Bayou Community Academy Charter School. In the past we have provided buses to St Bernard Parish School Board following Katrina. We also provided buses to East Baton Rouge Parish School Board following their flooding several years ago.

Beginning in 2011 through 2017, B&L Transportation has been listed by School Bus Fleet magazine as one of the top 50 school bus contractors in the United States.

The company is owned and operated by Billy and Leslie Schwartz. Billy Schwartz has been a resident of Larose for over thirty years. He is a graduate of the University of New Orleans with a degree in accounting and an ASE certified mechanic. He is also an ASE certified master school bus technician and a licensed State of Louisiana school bus inspector. He has over forty years of experience operating and maintaining fleets of charter buses and school buses. Leslie Loupe Schwartz is a lifelong resident of the South Lafourche area. She is a graduate of South Lafourche High School. Her work experience includes office management, personnel supervisor and payroll record keeper.

John Livaccari, New Orleans Operations Manager, worked for over 25 years at UPS gaining experience in logistics and delivery. Fleet Manager, Donald Ortego started working as charter service owner over 30 years ago. During his time at Holy Cross High School as Director of Facilities, he was tasked with rebuilding the school bus system after Hurricane Katrina. Alexis Schwartz serves as driver trainer and administers B&L Transportation's safety program. The on-road supervisors, dispatchers and drivers have come to us from other companies and bring their years of experience to B&L Transportation. (Resumes attached)

### Performance—Turnover—Accident History

- **On-Time Performance** – B&L Transportation has a planed vs actual arrival of less than 5 minutes per route.
- **Driver Turnover Rate**— 80 % of our drivers have been with B&L Transportation since school started in August. Drivers that have left B&L Transportation could not or would not comply with the policies of B&L Transportation and / or the City of New Orleans.
- **Accident History** - B&L Transportation's accident history in the Lafourche area has been 0 for the last 18 years. Since entering the New Orleans area in August of 2019 there have been 9 accidents. 5 accidents were at fault and 4 not at fault.

## **Resumes**

**Resumes are attached in Supporting Documentation (Section 13)**

- **John Livaccari**—Operations Manager
- **Donald Ortego**—Maintenance Manager
- **Alexis Schwertz**—Safety Manager
- **Anthony Collins**—Driver Supervisor



## B&L Transportation

### References

Steve Vales (985) 563-1106

Transportation Director

St. John the Baptist Parish Schools

P.O. Drawer AL—118 West 10<sup>th</sup> St.

Reserve, LA 70084

Ann Sanamo (985) 791-5705

(former Lafourche Parish School Board Member)

295 Gemini St.

Larose, LA 70373

Adam Campagna (504) 258-9409

Homer Plessy School

721 St. Philip St

New Orleans, La 70116

Kelly S. Batiste (504) 218-9203

Fannie C. Williams Charter School

11755 Dwyer Rd

New Orleans, La 70128

Yoshekia Brown (504) 507-0124

Foundation Preparatory Charter School

3121 St Bernard Ave

New Orleans, La 70119

## **Current Accounts**

### **Fannie C. Williams Charter School**

11755 Dwyer Rd

New Orleans, La 70128

### **Homer Plessy School**

721 St. Philip St

New Orleans, La 70116

### **Foundation Preparatory Charter School**

3121 St Bernard Ave

New Orleans, La 70119

## **Buses and Bus Drivers**

- Bus Fleet is Fully Insured—Policy in Supporting Documentation
- Each bus has semi-annual Louisiana State Police Inspection
- Each bus has passed the City of New Orleans CPNC Inspection
- All drivers have passed drug test and background check
- All drivers have CPNC badges issued by the City of New Orleans
- GPS tracking and Video Cameras on each vehicle

## Buses and Bus Drivers

B&L Transportation's New Orleans fleet maintains a 5% spare factor for equipment and drivers. In the event of a breakdown, field trip, driver or monitor call-in, we can fill the need immediately.

Our supervisors and dispatchers are knowledgeable in all areas of the operation. Supervisors and dispatchers are available to the drivers from 5:30am until the last bus returns to the yard each business day.

Dispatchers have an in-depth knowledge of the city. New Orleans is very challenging to dispatch. Our dispatchers grew up in this city and know how to make a route flow efficiently reducing student time on the bus and reducing the number of routes for a cost savings to the customer.



**Example of B&L Transportation Equipment**

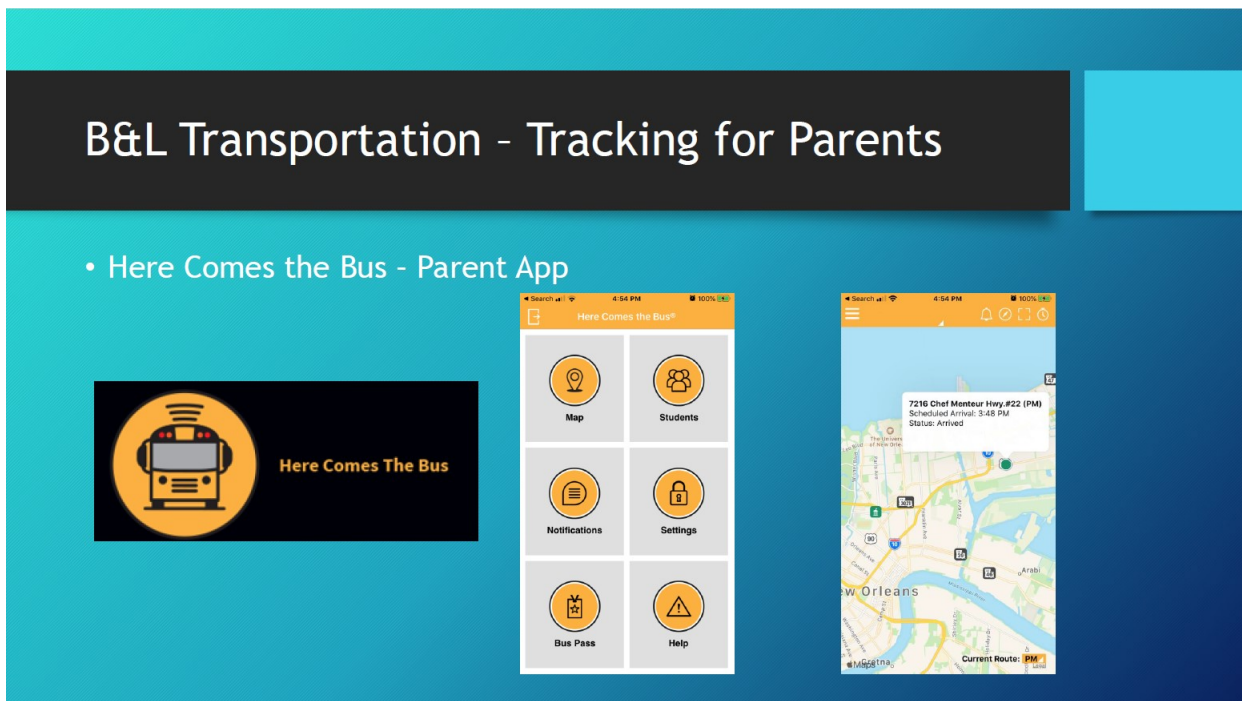




## B&L Transportation

### Here Comes the Bus App

Synovia also provides the Here Comes the Bus app for parents to track their child's bus.

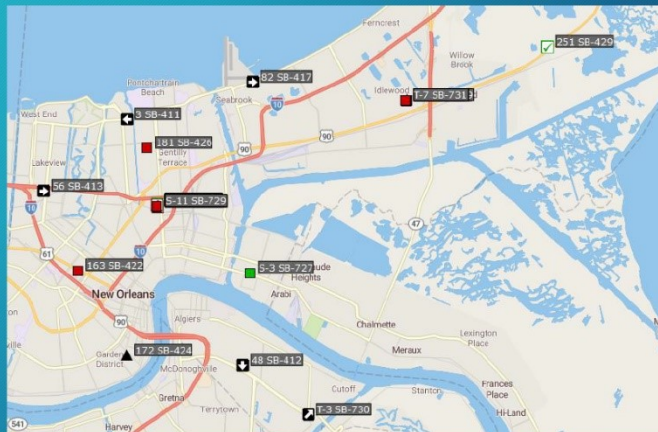


## GPS Monitoring

Synovia Solutions provides GPS tracking for B&L Transportation school buses.

### B&L Transportation- GPS Monitoring

- Live GPS Monitoring



## Video System

All B&L Transportation vehicles are equipped with 3 – 4 video cameras provided by Gatekeeper Mobile Video Solutions. We provide the school with software and training on the video system. This allows the school to see firsthand the behavior of the students and the driver.





## B&L Transportation

### Maintenance Program

B&L Transportation feels proper vehicle maintenance is one of the key factors in the successful operation of a school bus transportation maintenance program.

The core of our maintenance program centers around a comprehensive preventive maintenance program.

Our preventive maintenance program consists of various preventative maintenance inspections with pre & post inspections, twice daily. (Before & After each route)

Our inspections include mechanical inspections by qualified mechanics @ progressive mileage and time intervals. Our inspection program includes two semi-annual inspections by a licensed Louisiana school bus inspector.

We believe proper maintenance is key to the Safe & Successful transportation of students to and from school on time. We believe all maintenance issues, no matter how minor, need to be addressed, as quickly as possible, and documented to ensure the life safety of the passengers.

B&L has a comprehensive maintenance program that documents all major and minor repairs into a computer aided maintenance program. A copy of any vehicle maintenance record can be provided to the school upon request.

Attached is a copy of sample documents.

1. Daily pre & post trip inspection
2. Semi-annual inspection
3. Computer report of maintenance summary
4. Sample work order

All B&L Transportation vehicles are on a 2-week wash rotation. The vehicle is cleaned inside and outside. The driver is responsible for keeping the interior of the vehicle clean from debris and swept daily.

## **Driver Safety & Training Program**

The driver training program consists for “20” hours of classroom training and “10” hours of on road training.

Each driver candidate’s driving record is screened for violations in the past 3 years. An MVR is run on each driver candidate before the hiring process is complete. Each driver candidate must attend training class that is facilitated by a state certified trainer. After the driver candidate successfully completes the classroom instruction, they will begin on road training.

On road training is completed upon initial hire. Each driver is recertified one calendar year from previous certification. Each driver is observed on an annual safety ride, by a driver supervisor (sample form attached). A weekly report of driver behavior will be available with monthly and quarterly reviews of drivers and supervisors. At risk drivers will be recertified to correct the unsatisfactory behavior or safety concern.

Driver are trained in customer service. If any disagreement or argument arises with a student, parent or faculty member, the issue is resolved the same day.

Employees are drug screened before the city issues a CPNC badge. B&L Transportation employees will be retest before the start of the 2020-2021 school year. A random sample of employees will be tested each month during the school year.

B&L Transportation employees have a background check conducted at time of employment. A background check is required by the City of New Orleans before a CPNC badge is issued. Badges and / or background checks are available for review.

## **Student Safety Program**

The safe transport of students to and from school is the number one priority of our operation. Drivers, students, and school administrators must all work together to ensure the safe transportation of students. B&L will implement driver and student training practices for school buses along with route evaluations to ensure safety. Attached are copies of the Louisiana School Transportation specifications and procedures (Bulletin #119) that we will follow. Also attached is our copy of the “Standard Emergency Plans for School Buses”, which we presently utilize in Lafourche Parish.

Any student violating the safety program, will be reported to the school administration. A copy of the form documenting the student’s behavior will be submitted to the school. (Form Attached)

All bus suspensions or loss of ridership privileges must come from the schools Administration – B&L Transportation has a process in place which allows the driver to write up a student and turn the information in to the school. All disciplinary action is administered by the school.

Provide a monthly updated bus roster showing current ridership– Drivers are given and AM and PM roster at the start of each week. The rosters are turned in and kept of file at B&L Transportation’s office.

## B&L Transportation

### Routing Services

1. **Data Management:** B&L Transportation uses Routefinder to manage all routes. The Routefinder system can produce a number of reports including student demographic information, bus rosters, and routes across all pertinent systems. Routefinder has the ability to integrate with most school management systems. A daily import / export can be setup with the schools. Reports can also be setup to send to the school each day.
2. **Roster/Route Maintenance:** The drivers receive a new roster each week and the previous week's roster is filed in the office. Drivers use the roster on AM and PM routes to check students on and off the bus. Data files and rosters are sent to the schools on Friday before the end of the day.
3. **Special Considerations for SPED Service:** SPED route or any route change is completed and put on the road within 48 hours. Changes are communicated to the driver, school, and parents.
4. **Additional Routing Services:** B&L Transportation has a spare factor that is maintained for adequate equipment and driver levels. Making routes changes, adding or deleting a route will not have a negative affect on either the school or bus operation.

## Pricing

Morning / Afternoon Routes (Home to School Transportation)					
Bus Capacity	Cost Per Route Per Day	Excess Hourly Rate	Bus with A/C	Bus with Carseats	Monitor Cost Per Route Per Day
16 passenger or below	N/A				
17-35 passenger	N/A				
36-72 passenger	\$345 / \$235	0	\$345 / \$235	\$345 / \$235	\$345 / \$235
Special Needs Transportation (with A/C) price increase to add wheel chair / lift capability			\$345 / 235		

**Single Route**—Bus used only for one route / one school.

**Tiered Route**—Bus used for multiple routes among schools.

## Pricing

### Field Trip Pricing

Field Trips		
Bus Capacity	Within Orleans / Jefferson Parish Roundtrip	Outside Orleans / Jefferson Parish Roundtrip
16 passenger or below	N/A	N/A
17-35 passenger	N/A	N/A
36-72 passenger	\$175 3 hours \$50 add hour	\$175 3 hours \$50 add hour

## Pricing

A. **AM Route Services & PM Route Services**: The following rates are listed on a per-School Bus and a per-day basis, except as and/or in addition to as otherwise indicated.

Standard Route Services (centralized stopping): \$345.00 per bus

Tiered Route Services: \$235.00 per bus

Monitor Cost: \$105.00 per day

After School Program: \$125.00 up to 2 hours

Ea. additional hour or portion: \$50.00

B. **Special Event Route Services**: All rates for out-of-town Special Event Route Services shall be mutually agreed upon in writing by the parties on a per-occurrence basis.

Field Trips: \$175.00, plus \$50.00 for each additional hour over 3 hours. (limited to 100 mile radius)

## B&L Transportation

### Pricing

C. **Special Needs Route Services**: The following rates are listed on a per-School Bus and a per-day basis, except as and/or in addition to as otherwise indicated.

Standard Route Services (centralized stopping): \$345.00 per bus

Tiered Route Services: \$235.00 per bus

Monitor Cost: \$105.00 per day

D. **Miscellaneous Other Charges & Fees** (These fees will start August 2020):

Fees for Cancelled School-Day

Notified after 5 a.m.: 50% daily charge (per School Bus)

Bus Return To School

If bus is required to return to school after bus has been released by school because student missed bus for PM route: \$75.00



## **Supporting Documentation**

1—Louisiana Secretary of State Business Filing

2 –City of New Orleans Occupational License

3—City Of New Orleans CPNC Letter

4—Insurance Certificate of Liability

5—Louisiana State Police School Bus Inspection Form

6—Resume—John Livaccari

7—Resume—Donald Ortego

8—Resume—Alexis Schwertz

9—Resume Anthony Collins

**State of  
Louisiana  
Secretary of  
State**



**COMMERCIAL DIVISION**  
**225.925.4704**

Fax Numbers

225.932.5317 (Admin. Services)  
225.932.5314 (Corporations)  
225.932.5318 (UCC)

Name	Type	City	Status
B & L TRANSPORTATION, INC.	Business Corporation	LAROSE	Active

**Previous Names**

**Business:** B & L TRANSPORTATION, INC.

**Charter Number:** 34362828D

**Registration Date:** 8/29/1990

**Domicile Address**

428 WEST 23RD STREET  
LAROSE, LA 70373

**Mailing Address**

428 WEST 23RD STREET  
LAROSE, LA 70373

**Principal Office Address**

428 WEST 23RD STREET  
LAROSE, LA 70373

**Status**

**Status:** **Active**

**Annual Report Status:** **In Good Standing**

**File Date:** 8/29/1990

**Last Report Filed:** 9/3/2019

**Type:** Business Corporation

**Registered Agent(s)**

<b>Agent:</b>	LESLIE SCHWERTZ
<b>Address 1:</b>	485 WEST 23RD STREET
<b>City, State, Zip:</b>	LAROSE, LA 70373
<b>Appointment Date:</b>	8/24/2015

**Officer(s)**

**Additional Officers: No**

<b>Officer:</b>	WILLIAM F. SCHWERTZ
<b>Title:</b>	President
<b>Address 1:</b>	485 WEST 23RD STREET
<b>City, State, Zip:</b>	LAROSE, LA 70373

<b>Officer:</b>	LESLIE L. SCHWERTZ
<b>Title:</b>	Secretary, Vice-President

**Address 1:** 485 WEST 23RD STREET  
**City, State, Zip:** LAROSE, LA 70373

**Officer:** DONALD ORTEGO, JR  
**Title:** Trustee  
**Address 1:** 6615 WALES STREET  
**City, State, Zip:** NEW ORLEANS, LA 70126

**Officer:** STEPHEN SCHWERTZ  
**Title:** Treasurer  
**Address 1:** 515 WEST 23RD STREET  
**City, State, Zip:** LAROSE, LA 70373

## Amendments on File (3)

Description	Date
Revoked	11/15/2000
Reinstatement	11/22/2000
Appointing, Change, or Resign of Officer	7/8/2019

**Print**

City of New Orleans  
OCCUPATIONAL LICENSE

F.A.M.E., Inc. - Virtual Finance Committee Meeting - Agenda - Thursday July 2, 2020 at 5:00 PM  
LICENSE NO: 224807  
DATE ISSUED: 10/16/2019  
DATE EXPIRES: 12/31/2019

Issuance of this occupational license is a receipt for payment of said tax and entitles the recipient to operate a business at the location shown, provided said business is operated within the confines of the application thereof, and does not violate any city or state criminal, health, or zoning laws.

For the year ending December 31, 2019 the person or firm named hereon is hereby licensed to pursue the occupation of **3345 - PROF/SCIENTIFIC/TECHNCL SVCS, ALL OTH**

TAXPAYER	<b>B &amp; L TRANSPORTATION</b>	AMOUNT:	\$1,200.00
	<b>dba B &amp; L TRANSPORTATION</b>	INTEREST:	\$29.00
ACCOUNT NO:	<b>105041841</b>	PENALTY:	\$115.00
BUSINESS LOCATION	<b>3701 ELYSIAN FIELDS AVE</b>	TOTAL:	\$1,344.00

THIS PERMIT IS NOT TRANSFERABLE

*Norman L. White*  
DIRECTOR OF FINANCE

*Romy S. Samuel*  
COLLECTOR OF REVENUE

THIS CERTIFICATE MUST BE PUBLICLY DISPLAYED



**CITY OF NEW ORLEANS**  
Department of Finance  
Bureau of Revenue

## CERTIFICATE OF REGISTRATION

When you sell, close or move your business the certificate of registration should be surrendered to cancellation. You are required to register each new business location.

TAXPAYER:	<b>B &amp; L TRANSPORTATION</b>	CERTIFICATE NUMBER:	
	<b>B &amp; L TRANSPORTATION</b>		
ACCOUNT NUMBER:	<b>105041841</b>	EFFECTIVE DATE:	<b>7/8/2019</b>
BUSINESS LOCATION:	<b>3701 ELYSIAN FIELDS AVE</b>		
	<b>NEW ORLEANS, LA 70122</b>		

**Norman L. White**  
Director of Finance/Chief Financial Officer

THIS CERTIFICATE IS NOT TRANSFERRABLE



CITY OF NEW ORLEANS  
**DEPARTMENT OF FINANCE**  
**OCCASIONAL SALES TAX RETURN**

City Sales Tax Number ☐ None  
 10504118411

MONTH OF January 22 2020

S1 GROSS SALES OF ALL TANGIBLE PERSONAL PROPERTY & TAXABLE SERVICES	S1	949,870	
S13 TAX 5%	S13		
L10 OCCUPATIONAL LICENSE	L10	900	
S21 TOTAL TAX (MAKE YOUR REMITTANCE PAYABLE TO CITY OF NEW ORLEANS)	S21	\$ 900	

AMOUNT 900.00 ☐ CASH ☒ OTHER Check #991 January 22, 2020  
 Date

Owner Name John Livaccari  
 Trade Name  
 Mail Address 3701 ELUSIA DRIVE  
 City, State, Zip NEW ORLEANS, LA 70122  
 Dollars

I declare under the penalties for filing false reports that this return has been examined by me and to the best of my knowledge and belief is a true, correct, and complete return.

[Signature]  
 Taxpayer's Signature

Taxpayer hereby certifies that the above amount was this day paid to a representative of the Department of Finance and the original of this receipt left with him. ALL COPIES MUST BE ACCOUNTED FOR AND NO RECEIPT WILL BE RECOGNIZED BY THIS DEPARTMENT AS BEING GENUINE EXCEPT THE OFFICIALLY NUMBERED RECEIPT ISSUED BY THE DIRECTOR OF FINANCE OR DULY AUTHORIZED REPRESENTATIVE.

By [Signature] Revenue Deputy  
 204129  
 OFFICIAL RECEIPT  
 CITY OF NEW ORLEANS  
 LOUISIANA

ORIGINAL - GREEN DUPLICATE - PINK TRIPLICATE - BLUE



DEPARTMENT OF SAFETY AND PERMITS  
GROUND TRANSPORTATION BUREAU

**CITY OF NEW ORLEANS**

LATOYA CANTRELL  
MAYOR

ZACHARY R. SMITH  
DIRECTOR

11/25/2019

B & L Transportation, Inc  
428 West 23rd Street  
Larose, LA 70373

Re: School Bus CPNC Award Letter 19CPN-22762

Dear B & L Transportation, Inc:

Your request for a School Bus Certificate of Public Necessity and Convenience has been awarded.

**You have ninety (90) days from the above date to activate your CPNC**

In order to activate the CPNC and have it issued, you must provide copies of the following documents:

- City of New Orleans Occupational License
- Current for-hire vehicles registration
- A certificate of insurance listing the required limits and the vehicle's VIN
- A company line letter
- Fidelity Bond (Limousines Only)

Upon receipt of the proper documents, the Bureau will issue the CPNC number that will need to be affixed to the vehicle. The vehicle is required to pass inspection prior to the CPNC being issued. The vehicle will not be allowed to operate in the City of New Orleans until it passes inspection and the CPNC is issued.

If this process is not completed within the ninety (90) days, you may request an extension pursuant to the City Code. There is a \$50.00 per month holding fee. In the event that an extension is not requested and/or approved, the awarded CPNC application will be closed and considered void.

Please be aware that as a CPNC holder operating in the City of New Orleans, you and your agents are required to comply with Chapter 162 of the City Code as well as all administrative rules and regulations of the Ground Transportation Bureau. Failure to comply with these regulations and requirements may result in the suspension or revocation of the CPNC. The City of New Orleans does not consider a CPNC property that can be mortgaged or apportioned and recognizes CPNCs as a privilege granted to holders.

CPNCs expire annually and required to be renewed in accordance with the City Code. A complete schedule of fees and expiration dates is outlined below.

3901 DESIRE PKWY | ROOM 103 | NEW ORLEANS, LOUISIANA 70126  
TELEPHONE: 504.658.7170 | FACSIMILE: 504.658.7208



DEPARTMENT OF SAFETY AND PERMITS  
GROUND TRANSPORTATION BUREAU

**CITY OF NEW ORLEANS**

LATOYA CANTRELL  
MAYOR

ZACHARY R. SMITH  
DIRECTOR

**CPNC Expiration Dates:**

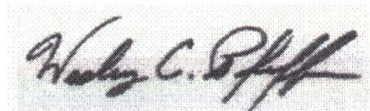
- Animal Drawn Carriage, Courtesy, & Pedicab: March 31
- School Bus: April 30
- Limousine, General Charter, Sightseeing, Airport Shuttle, Non-Emergency Medical Transportation, Charter Party Carrier: June 30
- Taxicab & Accessible Taxicab: December 31

**Fee Structure:**

- Accessible Taxicab New Issuance & Annual Renewal: \$300
- Courtesy New Issuance & Annual Renewal: \$300
- All other CPNC New Issuance & Annual Renewal: \$150
- Change of equipment: \$50
- CPNC extension: \$50
- Vehicle Inspection/Reinspection: \$50
- Vehicle Inspection Delinquency: \$2 per day

The Ground Transportation Bureau is here to serve you and your business, as well as to ensure that the for-hire industry offers the residents of and visitors to the City of New Orleans safe and excellent service. The Bureau has office, inspection, and field staff available to assist you. Please contact our office at (504) 658-7170 or the inspection station at (504) 658-7276, should you have any questions or concerns.

Sincerely,



Wesley Pfeiffer

Deputy Director, Ground Transportation Services & Enforcement





B&amp;LTRAN-01

BRIDGET

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

01/21/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Eustis Insurance, Inc. 110 Veterans Memorial Boulevard Suite 200 Metairie, LA 70005	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (504) 586-0440      FAX (A/C, No): (504) 565-5219 E-MAIL ADDRESS: info@eustis.com														
<b>INSURED</b>  B&L Transportation, Inc. 428 West 23rd Street Larose, LA 70373	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> <tr> <td>INSURER A : Burlington Ins. Company</td> <td>23620</td> </tr> <tr> <td>INSURER B : Scottsdale Insurance Co.</td> <td>41297</td> </tr> <tr> <td>INSURER C : Merchants National Insurance Company</td> <td>12775</td> </tr> <tr> <td>INSURER D : Bridgefield Casualty Insurance Company</td> <td>10335</td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Burlington Ins. Company	23620	INSURER B : Scottsdale Insurance Co.	41297	INSURER C : Merchants National Insurance Company	12775	INSURER D : Bridgefield Casualty Insurance Company	10335	INSURER E :		INSURER F :	
INSURER(S) AFFORDING COVERAGE	NAIC #														
INSURER A : Burlington Ins. Company	23620														
INSURER B : Scottsdale Insurance Co.	41297														
INSURER C : Merchants National Insurance Company	12775														
INSURER D : Bridgefield Casualty Insurance Company	10335														
INSURER E :															
INSURER F :															

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <div style="margin-left: 20px;"> <input type="checkbox"/> CLAIMS-MADE    <input checked="" type="checkbox"/> OCCUR         </div> <div style="margin-left: 20px;">           GEN'L AGGREGATE LIMIT APPLIES PER:  <input type="checkbox"/> POLICY    <input type="checkbox"/> PRO-JECT    <input checked="" type="checkbox"/> LOC            OTHER:         </div>			110BW52635	07/01/2019	07/01/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY <div style="margin-left: 20px;"> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY    <input checked="" type="checkbox"/> SCHEDULED AUTOS  <input checked="" type="checkbox"/> HIRED AUTOS ONLY    <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY         </div>			QFS0000577	07/01/2019	07/01/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
C	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUPN000271	07/01/2019	07/01/2020	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		196-48931	07/01/2019	07/01/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.I. EACH ACCIDENT \$ 1,000,000 E.I. DISEASE - EA EMPLOYEE \$ 1,000,000 E.I. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Blanket Additional Insured and Waiver of Subrogation as respects General Liability may be provided if required by written contract, per forms #CG2010 04/13 & CG2404 05/09, respectively, and policy terms and conditions. General Liability coverage afforded is Primary & Non-Contributory if required by written contract, per form #IFG-G-0094 03/17 and policy terms & conditions.

Blanket Additional Insured and Waiver of Subrogation as respects Auto Liability may be provided if required by written contract, per form #CA2048 10/13 & CA0444 10/13, respectively, and policy terms and conditions. Auto Liability coverage afforded is Primary & Non-Contributory if required by written contract, per form #CAS-156 02/16 and policy terms & conditions.

Blanket Waiver of Subrogation may apply as respects Workers Compensation, if required by written contract per form #WC0003 13 terms and conditions.

SEE ATTACHED ACORD 101

**CERTIFICATE HOLDER****CANCELLATION**

City of New Orleans 1300 Perdido St., 7th Floor New Orleans, LA 70112	<p>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</p> <p>AUTHORIZED REPRESENTATIVE</p>
---	--

ACORD 25 (2016/03)

© 1988-2015 ACORD CORPORATION. All rights reserved.

The ACORD name and logo are registered marks of ACORD



LOC #: 1



## ADDITIONAL REMARKS SCHEDULE

Page 1 of 1

AGENCY <b>Eustis Insurance, Inc.</b>		NAMED INSURED <b>B&amp;L Transportation, Inc.</b> 428 West 23rd Street Larose, LA 70373	
POLICY NUMBER <b>SEE PAGE 1</b>			
CARRIER <b>SEE PAGE 1</b>	NAIC CODE <b>SEE P 1</b>	EFFECTIVE DATE: <b>SEE PAGE 1</b>	

## ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

Description of Operations/Locations/Vehicles:  
Coverage applies to the attached list of vehicles:

2002 International IC Bus 1HVBRABP62B942568  
2002 International IC Bus 1HVBRABP92B942578  
2002 International IC Bus 1HVBRABP92B942547  
2002 International IC Bus 1HVBRABP62B942585  
2004 International IC Bus 4DRBRABP54A966628  
2002 International IC Bus 1HVBRABP12B942574  
2004 International IC Bus 4DRBRABPX4A964714  
2002 International IC Bus 1HVBRABP12B942543  
2002 International IC Bus 1HVBRABP72B942532  
2002 International IC Bus 1HVBRABM62B942687  
2002 International IC Bus 1HVBRABMX2B942689  
2002 International IC Bus 1HVBRABM82B942691  
2002 International IC Bus 4DRBRABPX2A949224  
2002 International IC Bus 1HVBRABP32B942544  
2002 International IC Bus 1HVBRABP62B942540  
2002 International IC Bus 1HVBRABP42B942598  
2002 International IC Bus 4DRBRABP12A949225  
2002 International IC Bus 1HVBRABP12B942591  
2002 International IC Bus 1HVBRABM82B942688  
2012 Blue Bird IC Bus 1BAKGCPH9CF286542  
2014 Blue Bird IC Bus 1BAKGCPH7EF303647  
2015 Blue Bird IC Bus 1BAKGCPH9FF306132  
2002 International IC Bus 1HVBRABP32B942561  
2005 International CE Bus 4DRBUAFM85B989931  
2007 International IC Bus 4DRBUAFMX7A480089  
2002 International IC Bus 1HVBRABP42B942536  
2002 International IC Bus 1HVBRABPX2B942556  
2002 International IC Bus 1HVBRABP72B942580  
2002 International IC Bus 1HVBRABP72B942563  
2002 International IC Bus 1HVBRABP02B942534

**LOUISIANA DEPARTMENT OF PUBLIC SAFETY - OFFICE OF STATE POLICE**  
**SEMIANNUAL SCHOOL BUS INSPECTION REPORT**

BUS NO.: \_\_\_\_\_

OWNER'S NAME/ADDRESS/CITY: \_\_\_\_\_

LICENSE PLATE NO.: \_\_\_\_\_

VIN: \_\_\_\_\_

YEAR/ MAKE/MODEL: \_\_\_\_\_

NEW INSPECTION STICKER NO.: \_\_\_\_\_

\*LOOE REQUIRES BUSES TO BE RETIRED IF OLDER THAN TWENTY-FIVE (25) MODEL YEARS OLD (Bulletin 118, §2511).

CURRENT PROOF OF INSURANCE? YES \_\_\_\_\_ NO \_\_\_\_\_

BUS PURCHASE DATE\* : \_\_\_\_\_

\*\*LRS 32:378 REQUIRES ALL SCHOOL BUSES PURCHASED AFTER AUG. 15, 1989 TO BE EQUIPPED WITH AN AUDIBLE BACKING ALARM THAT SOUNDS A WARNING WHEN THE BUS IS ROOLING BACKWARD WITHOUT RESPECT TO THE GEAR POSITION; LRS 17:184.1 REQUIRES THAT ALL SCHOOL BUSES PURCHASED AFTER JAN. 1, 1994 BE EQUIPPED WITH A CROSSING CONTROL ARM.

Inspect Bus Front		GOOD	CAUTION	REPAIR
1	BUMPERS - Painted glossy black			
2	CROSSING CONTROL ARM- Operation & Condition? (Required if Purchased after 01/01/1993)			
3	CROSS VIEW MIRROR- SECURE? ADJUSTABLE? (Required after 07/1/1978)			
4	FLASHING STOP LAMP WARNING SYSTEM			
5	FOUR-WAY HAZARD WARNING LAMPS			
6	HEADLAMPS/RUNNING LAMPS - HIGH BEAM/LOW BEAM			
7	TURN SIGNALS (Amber in front)			
8	Identification Lamps ( 3 Amber on front road)			
9	PARKING LAMPS			
10	HOOD LATCHES SECURELY			

Inspect Driver's Side of Bus		GOOD	CAUTION	REPAIR
11	BATTERY SECURED? (No wire, cord or other non-standard fastening devices permitted)			
12	EXTERIOR SIDE VIEW MIRRORS SECURELY FASTENED/ADJUSTABLE?			
13	OWNER'S NAME ( In 2"-4" letters located under the driver's window)			
14	SIDE MARKER LAMPS (Amber at front/rear -required on buses purchased before July 1993)			
15	SIDE REFLECTORS (Amber at front/rear)			
16	STOP ARM AND LAMPS WORKING (Letters clearly legible?)			

Inspect Bus Rear		GOOD	CAUTION	REPAIR
17	2 RED REFLECTORS ON REAR OF BUS			
18	BACK UP LIGHTS			
19	BRAKE, TURN, TAIL & RUNNING LIGHTS			
20	FLASHING STOP LAMP WARNING SYSTEM			
21	FOUR-WAY HAZARD WARNING LAMPS			
22	Identification Lamps (3 red on rear road)			
23	STROBE LIGHT (Rear roof-mounted, white double flash)			
24	EMERGENCY DOOR GASKET/SEAL (Seal must not allow exhaust fumes to enter)			
25	EMERGENCY EXIT REFLECTIVE STRIPING (all emergency exits 1989 model and later)			
26	REAR MUD FLAPS			
27	TURN SIGNALS (Amber or red in rear)			
28	"EMERGENCY EXITS" (Lettered exterior)			
29	"STOP ON SIGNAL" OTHER UNAUTHORIZED LETTERING AND DECALS REMOVED			

Inspect Passenger Side of Bus		GOOD	CAUTION	REPAIR
30	ENTRANCE DOOR GASKETS & GLASS			
31	EXTERIOR SIDE VIEW MIRRORS SECURELY FASTENED? ADJUSTABLE?			
32	SIDE MARKER LAMPS - (Amber at front/rear -required on buses purchased before July 1993)			
33	SIDE REFLECTORS (Amber at front/rear)			

Walk-Around Inspection		GOOD	CAUTION	REPAIR
34	2 FRONT TIRES (Minimum 4/32" tread; no retreads)			
35	4 REAR TIRES (Minimum 2/32" tread)			
36	CLEARANCE LAMPS (1 Red on each rear corner/1 amber on each front corner)			
37	EXTERIOR PAINT			
38	6" MIN. BUS NUMBERS (Front bumper-gloss white or yellow; under driver's window, under right rear brake light, and left of entry door-gloss black)			
39	5" MIN. PARENTH/SCHOOL LETTERING ( Parish or CITY/SCHOOL)			
40	RIMS, STUDS AND LUOS			
41	WHEEL COLOR (no chrome; black or grey only)			

INSPECTION STATION'S NAME AND IDENTIFICATION NUMBER: \_\_\_\_\_

Inspect Bus Interior		GOOD	CAUTION	REPAIR
42	INTERIOR DOME LAMPS/STEPWELL LIGHT			
43	3 SAFETY REFLECTIVE TRIANGLES			
44	6" AUXILIARY FAN			
45	BEAM INDICATOR			
46	SQUEEZERS - EMERGENCY DOOR(S) AND WINDOWS			
47	DEFROSTER			
48	HEATER(S)			
49	DRIVER'S WINDOW (Opens & Closes Readily)			
50	FIRE EXTINGUISHER (5 lb ABC Type; charged & securely mounted)			
51	FIRST AID KIT & CONTENTS (Securely mounted)			
52	BODY FLUID CLEAN UP KIT (Securely mounted; if equipped)			
53	FLOOR PAN/GEAR SHIFT/PARKING BRAKE (All openings must be sealed)			
54	FLOOR/STEPWELL INTEGRITY & COVERING (No rust through; all holes & tears sealed)			
55	HORN			
56	INSTRUMENT PANEL LAMP			
57	INTERIOR MIRROR (6" X 16"-Type A buses; 6" X 30"-Type B, C and D buses; sealed edges)			
58	INTERIOR PAINT			
59	PASSENGER WINDOWS (Easily open & close)			
60	SEAT BELT (DRIVER)			
61	SUN VISOR (6"X30"; adjustable & transparent)			
62	GAUGES/WARNING LAMPS			
63	WHEELCHAIR LIFT (No leaks; lifts minimum 750 lbs.)			
64	WINDOWS/GLASS (No Cracks or breakage)			
65	WINDSHIELD (No cracks, fogging, scratches)			
66	WINDSHIELD WASHERS			
67	WINDSHIELD WIPERS, ARMS & BLADES			
68	WIRING & SWITCHES ( No hanging or frayed wires)			
69	"EMERGENCY EXITS" (Lettered interior)			
70	BENCH SEATS (Covers, padding, bottom cushion attached to frame; frame securely bolted down)			
71	GENERAL CLEANLINESS			

Inspect Underside of Bus		GOOD	CAUTION	REPAIR
72	EXHAUST SYSTEM (No leaks; no rot; no broken hangers; no leaking gaskets; tail pipe must extend past passenger compartment but not more than 2')			
73	KING PINS (Front and must be fitted)			
74	SPRINGS & SHOCKS (No leaking fluid, broken or missing leaves; no damage to coils, shackles, related hardware)			
75	STEERING COMPONENTS (Ball joints, drag link, cotter pins/castle nuts)			

Inspect Under Hood		GOOD	CAUTION	REPAIR
76	FLUID LEAKS- (Fuel, oil, bearing grease, water/coolant, steering, transmission, or brake fluid)			
77	MASTER CYLINDER/ BOOSTER/ CHECK VALVE			

Inspect During Test Drive		GOOD	CAUTION	REPAIR
78	AIR BRAKES- STOPS WITHIN 30' AT 20 MPH (Reservoirs, safety valve on Reservoir, air hoses, audible low pressure warning lamp and buzzer; no leaks)			
79	HYDRAULIC BRAKES- STOPS BUS WITHIN 30' AT 20 MPH			
80	PARKING BRAKE- MUST HOLD UNDER LOAD			
81	BACK UP ALARM ( Must detect rearward motion in neutral or forward gear; required if bus was purchased after 8/15/1993)			
82	SPEEDOMETER/ODOMETER WORKING			
83	TRANSMISSION/CLUTCH			

ADDRESS: \_\_\_\_\_

CERTIFIED INSPECTOR'S NAME (PRINT CLEARLY): \_\_\_\_\_

CITY: \_\_\_\_\_

DATE: \_\_\_\_\_

CERTIFIED INSPECTOR'S SIGNATURE: \_\_\_\_\_

INSPECTOR'S LICENSE NUMBER: \_\_\_\_\_

OTHER REMARKS

(Circle One)

PASS      FAIL      PULL FROM SERVICE

---

**John Livaccari****jlivaccari@bellsouth.net****504.460.7127**

---

**D**egree in Computer Information Systems and a 25-year technology-based career with United Parcel Service (UPS). Promoted up the ranks from auditing timecards & delivery records to directing multifaceted technology projects throughout LA & MS as a key player in the Industrial Engineering Department.

Last 5 years with UPS were devoted to field operations ~ managing up to 22 employees & 7 management personnel to ensure accurate / timely route mapping, and total safety & efficiency of package processing and loading / unloading of 40+ trucks dispatched daily.

Background includes 5 years of business ownership in addition to working fulltime at UPS. Setup a seasonal *online shopping cart* for New Orleans King Cakes and delivered them nationwide. Currently employed as the Operations Manager for B&L Transportation.

Highly knowledgeable of all MS products; specialize in selecting / procuring programs & equipment; installing hardware, software & networks and teaching end-user. Proficient with various media formats: Facebook, LinkedIn, Instagram.

**CORE COMPETENCIES**

- |  |                                     |
|--|-------------------------------------|
| ➤ Sales, Service & Customer Loyalty    | ➤ Driver & Employee Safety Training |
| ➤ Account Growth, Budgeting & Profits  | ➤ Arrival & Departure Scheduling    |
| ➤ Employee Training & Development      | ➤ Service & Production Improvement  |
| ➤ Safe & Orderly Worksite Maintenance  | ➤ Accurate & Efficient Paperwork    |
| ➤ Associate Morale & Retention         | ➤ Work Order & Project Completion   |
| ➤ Problem-Resolution & Decision-Making | ➤ Compliance with Company Policy    |
| ➤ DOT & OSHA Safety Regulations        | ➤ Loss Prevention & Logistics       |
| ➤ Inventory / Asset Management         | ➤ Hazardous Material Auditing       |

---

**Operations Manager**

B&amp;L TRANSPORTATION – New Orleans

2019 to date

*Recruited due to Management and Operations experience with UPS.*

- Managed 30 school bus drivers servicing 4 schools in Orleans Parish.
- Negotiated multiple year contract with the schools
- Worked with city and school administrators to get all school buses through city inspection during the first 4 months of operation.
- Hired drivers and completed background check, drug testing, motor vehicle record, safety and city certifications.
- Created and dispatched all routes for the schools. Worked with school administrators and parents to make stops in a safe and timely location.
- Work with school administrators at all levels including – conflict / resolution, planning, routing, billing, discipline.
- Daily dispatch of routes and drivers.
- Conduct driver safety meetings

**IT Director & Sales & Marketing Manager**

RESTLAWN PARK CEMETERY

2017 to 2019

*Recruited to modernize & automate office operations due to background with UPS.*

- Evaluated company's outdated manual operations; selected & implemented Memorial Business Systems due to easy learning curve & user-friendly applications. Totally eliminated redundant & error-prone tasks.
- Replaced inefficient office operations to automatically manage data conversion, recordkeeping, accounting, customer development, electronic payments, memorial ordering, etc. Trained, mentored & supported desktop users.

- Created new filing system for cemetery property owners and contracts. Ensured perpetual care account sales were sent to the State in compliance with LA State Board rules & regulations.
- Reviewed past-due collection amounts (tens of thousands) that were delinquent since 1990s; set up a collection system involving skip-tracing to recover the debts.
- Motivated and retrained sales force; attended multiple civic & club events to prospect for sales leads; company reported “best quarters” since being hired.

**Branch Dispatcher**

B&amp;G CRANE SERVICE

2015 to 2016

*Recruited from UPS.*

- Ensured smooth and efficient scheduling & dispatch of up to 50 crane operators, oilers and drivers.
- Managed communication network to relay work orders, messages, and information to / from work crews, supervisors, and operators. Applied for travel permits; planned routes; scheduled arrival & departure times.
- Oriented all new hires; kept trainings current; performed monthly audits of operators & inventory of equipment.
- Reviewed time cards for accuracy; resolved payroll issues; assisted salesforce with turnaround planning at plants.

UNITED PARCEL Service (UPS)

1990 to 2015

**Dispatch Supervisor, 2010 to 2015**

- Supervised up to 22 union employees and 7 management personnel in New Orleans & Harvey Centers to maintain efficient dispatch plan and package deliveries. Used web-based and tracking for inbound loads.
- Operated computer-based dispatching for 40+ routes with precision balance scheduling for all drivers.
- Monitored job performance of package handlers to ensure packages were loaded in time; set schedules; observed loading & unloading of trucks to prevent losses and ensure compliance with all safety standards.
- Oversaw customer counter, international package processing and all Air Operations processes.
- Ensured adequate staff coverage for all shifts (AM & PM).
- Provided safety training to all management and hourly employees; served as the Hazard Material Auditor.

**Industrial Engineering Department, 1990 to 2005***Overview of increased areas of accountability, leadership and technological support & supervision in keeping up with company expansion into global logistical operations:*

- Utilized in-depth computer knowledge of networking options, system size & scale, cabling & hardware selections, infrastructure installs & rebuilds, equipment types & functions *to perform or direct* diversified technology projects.
- Installed, configured, maintained, supported, troubleshoot, diagnosed & repaired hardware & system problems.
- Implemented UPS's District Helpdesk. Installed and supported UPS service shipping at external customer locales.
- Supported technology at general offices, delivery centers, and air facilities by installing & supporting Windows & IBM AS/400 operating systems and training PC & laptop users on Dell, Compaq, HP & IBM products.
- Assisted corporate engineer in rebuilding network infrastructure in N.O. facility following Hurricane Katrina.
- Implemented UPS's first satellite communications. Supervised techs in building servers, workstations and communications equipment; reopened facility 2 weeks before corporate deadline.
- Installed and maintained Windows NT servers and workstations in LA & MS; managed all costs.
- Installed dedicated server rooms; updated Ethernet wiring in 32 facilities; reduced technician-paid hours, equipment repair & purchases and support costs. Coordinated PBX replacements in LA & MS facilities.
- Installed new technology (Preload Assist System) & trained employees to load package cars which improved operational efficiency in production, load quality, service to customer while reducing workforce.
- Created daily reports for distribution to management; planned staffing, delivery volume & rental needs for 30 locations in LA & MS; created daily dispatch for computer technicians; oversaw all upgrades.
- Installed LAN network to enable communications between UPS ramp operations & office facilities.
- Managed implementation of international shipment processing to incorporate various functions into 1 PC-based system.
- Managed data imaging system project to improve capture of billing documents & service quality in 32 facilities.
- Developed and implemented the training program for this project that reduced labor & billing process costs.
- Managed domestic data imaging system project that improved overall service quality ~ response time, delivery accuracy, shipping integrity, package intercepts and overall cost.
- Served as automotive fleet coordinator ~ justified, ordered and distributed package cars and ground equipment.

- Managed operations as building & facilities coordinator ~ justified projects & prepared budgets for budget meetings; conducted monthly district project meetings.
- Implemented computer-based dispatch systems in 6 service centers in Gulf South District which increased driver effectiveness for routes.
- Transferred from technology into dispatch operations when Industrial Engineering Department was relocated to Houston.

DELGADO COMMUNITY COLLEGE  
**AS in Computer Information Systems**

Donald J. Ortego, Jr.  
6615 Wales St.  
New Orleans, LA 70126  
(504)496-6239

## Facilities-Director of Operations

### Qualifications Profile

Take charge professionally. Responsible and ready to run with any management team. Comprehensive leadership and management experience within construction and facility industry, combined with solid experiences and prioritizing and planning projects effectively and efficiently. Demonstrates in-depth knowledge of policies, procedures and contracts. Decisions leading with solid trouble shooting skills combined with team building.

### Area of Expertise

- Louisiana 1<sup>st</sup> Class Engineering License (ten years)
- Budget Management
- Property Facility Management
- Inventory Management
- Negotiating Vendor Contracts
- Employee Development and Training
- MEP (Mechanical, Electrical, Plumbing)Certified
- OSHA Training
- MACS Certified
- Multiply Site Management
- Specialize in Trouble Shooting
- CFC International Certified
- Energy Management Trained



- HVAC Control Management (Automated, Honeywell, Seimens)
- Lenel Access Control Systems
- NEC Code
- Mechanical Code
- NFPA Code

### Other Areas of Expertise

- ASE Certified Mechanic (Gold)
- Diesel Certified Mechanic
- Hydraulics Certified Mechanic
- Transmission Certified Mechanic
- D. O. T. Certified Inspector

### Accomplishments

- Oversaw the construction of the Holy Cross School project, both temporary and permanent locations (150 Million Dollar Project)
- 5, 10, 15 and 30 strategic plans for deferred maintenance budgets
- Controlled and maintained operational budgets for Holy Cross Facilities
- Responsible for 23 third party vendors and 8 full time employees
- Personally responsible for the reduction of the utility annual savings of \$230,000.00, due to load sheading programming
- Responsible for the day to day operations of two campuses
- Responsible for the safe DOT operations of 15 school buses and equipment
- Directed and managed 1200 ton chiller and A/C and heater systems

- Maintained three football fields and 15 acres of ground maintenance
- Responsible for all fire safety programs and certifying all devices for both campuses
- Wrestling coach 2004-2017 (4 State Titles) Instrumental in developing both middle school and high school programs
- Oversaw construction of St. Charles Surgical Hospital with the hospital engineer

### Professional Experiences

- Director of Campus Operations: Holy Cross School (2007-2017)
- Owner of Professional Construction Services of LA (2003-2007)
- Owner of Specialty Bus (1988-2001)

### Education

- Holy Cross High School 1981-1985 (High School Diploma)
- University of New Orleans 1985-1987 (General Studies)
- Penn Foster 2007-2009 (HVAC Engineering)

### Aviation

- High Performance, complex private pilot
- Aircraft Owner
- Hanger Owner
- Currently on BOD for Lakefront Hanger Association
- Currently working on A/P License



## ALEXIS SCHWERTZ

alexis.schwartz@yahoo.com ♦ 515 West 23rd Street Larose, LA 70373 ♦ (985) 258- 8282

### OBJECTIVES

A resourceful and well-rounded team player who delivers results to enable organizational success. Seeking the role as transportation coordinator that will allow a strategic and versatile in employee relations, knowledge of roadways, school sites and district boundaries, Staffing, Training and Project Management to provide sound advice and counsel to ensure compliance with company policies and procedures, as well as all federal, state and local laws

### EDUCATION

**American InterContinental University** HOFFMAN ESTATES, IL United States

Bachelor's Degree 02/2013

**Credits Earned:** 171.00

**Major:** Bachelor's (BBA) - Business Administration Specialization in Accounting

**Thomas Nelson Comm. College** Hampton, VA United States

Some College Coursework Completed 05/2008

**GPA:** 3.0 of a maximum 4.0

**Credits Earned:** 21.00

**Major:** Business Administration

**Community College of the Air Force** Hampton, VA United States

Technical or Occupational Certificate 08/2007

**Credits Earned:** 48.00

**Major:** Aircraft Armament Systems Technology


**Louisiana Tech University** Ruston, LA United States

Some College Coursework Completed 12/2004

**GPA:** 3.1

**Credits Earned:** 17 Quarter hours

**Major:** Secondary Education



Alexis Schwertz

---

## EXPERIENCE

State Board of Elementary and Secondary Education **12/2018**  
Louisiana Department of Education, United States –  
**Present**

### **Louisiana School Bus Driver Instructor**

Certification to teach Louisiana School Bus Driver Course and the Defensive Driving Course, “Coaching the School Bus Driver,” for partial fulfillment of the Louisiana school bus driver certification requirements for new Louisiana school bus drivers.

Lafourche Parish School Board **10/2016**  
Larose, LA United States –  
**Present**

### **Bus Driver Trainer**

Principles, concepts, and techniques of driving, inspecting, and managing passengers on vehicles of the appropriate type and size. Professional appearance and demeanor with a positive attitude. Effective communication skills (both verbal and nonverbal). Understanding and reacting to many forms of learning abilities and reading comprehension skills. Provide quality behind-the-wheel training in vehicles of the appropriate type and size. Demonstrate proper instructional methods and provide quality classroom instruction. Read, interpret, and explain laws, regulations, and policies pertaining to transportation. Communicate effectively and make appropriate decisions.

Lafourche Parish School Board **10/2012**  
Lafourche Parish, LA United States –  
**Present**

### **Bus Driver**

Transport children to and from school in the mornings and afternoons. Verify permissions for children who ride home with friends. Maintain a clean and mechanically-sound bus always. Obey all traffic laws. Perform inspections of the bus before and after each route. Ensure safety of all students. Discipline children when required to maintain a safe and healthy environment. Assist students with getting on and off the bus when required.

Faire La Fete **02/2012**  
Golden Meadow, LA United States –  
**Present**

### **Event and Party Coordinator and Wedding Planner**



Alexis Schwertz

---

Creates detailed timelines and floor plans. Helps determine and manage your budget. Brainstorms style ideas and coordinates design details. Coordinates hotel room blocks and transportation. Manages the rehearsal. Oversees everything on the wedding day (makes sure everyone adheres to the timeline, handles snafus, manages vendors, and executes vision on-site). Negotiates vendor referrals and contract to day-of execution of the bride's vision and removes the guesswork out of the process, making planning a wedding as seamless and smooth as possible. Keeps track of their budget and handle the logistics. Provides design and/or styling services, helping with the creative specifics to their wedding day.

Parker Marines  
Cut Off, LA United States

04/2011 –  
12/2011

**Accountant and Bookkeeper**

**Supervisor:** Lance Parker

Specializing in Quick books with accounts payables and accounts receivables. Keeping track of all files for the companies. Dealing with customers on one-on-one bases with invoices and payments. Tracking all out-going and incoming products. Dealing with all other employees with time clocks and issuing out payroll. Filing 940's and 941's with the IRS. Using Microsoft excel spreadsheets to compose a time sheet to pay payroll.

**Crabs LLC**  
Larose, LA United States

07/2010  
–  
8/2011

**Accountant and Bookkeeper**

Specializing in Quick books with accounts payables and accounts receivables. Keeping track of all files for the companies. Dealing with customers on one-on-one bases with invoices and payments. Tracking all out-going and incoming products. Dealing with all other employee's with time clocks and issuing out payroll. Filing 940's and 941's with the IRS. Using Microsoft excel spreadsheets to compose a time sheet to pay payroll. Working with H2-B Visa workers out of Mexico.

**Harrah's Casino**  
New Orleans, LA United States

06/2009  
–  
07/2010

**Trained Blackjack, Roulette and Poker Dealer**

Effectively provided and promoted good customer service. Able to function in high volume atmosphere. Accurately can administer all aspects of mathematical operations. Highly motivated and outgoing personality. Experienced making decisions in high stress environments. Extremely dedicated worker.

**United States Air Force**  
Hampton, VA United States

09/2006  
–  
08/2007

**Computer Systems Analyst**

---



Alexis Schwartz

---

Responsible for reviewing Core Automated Maintenance Systems (CAMS) data entries for daily accuracy through pilots and aircraft sorties annually on twenty F-15 C/D aircraft. Maintains and updates aircraft debriefing records, aircraft forms and Computerized Fault Reporting Systems (CFERS). Assisted in debriefing over 498 flights and 946.4 flight hours through a complex CFERS program while at home station Langley, AFB, Hampton, VA. Ensured 100% Aviation Petroleum Oils and Lubricants (AVPOL) program accountability for refueling. Contributed to process over 410,000 pounds of JP-8 fuel following deployment for AVPOL program.

**United States Air force**  
Hampton, VA United States

**04/2004**

-

**08/2006**

**Armament Systems Specialist/Weapons Loader**

Examines aircraft guns for defect. Performs armament systems maintenance functions. Plans, organizes and directs aircraft armament systems maintenance activities. Loads, unloads and positions munitions on aircraft. Inspects repairs and maintains aircraft release, launch, suspension and monitors systems, guns, aircraft and related equipment.

## ACHEIVEMENTS

- ♦ Facilitating Reinstatement/ Conversion of Personnel Security Clearance for Industry- Level of Clearance: Secret
- ♦ Air Force Outstanding Unit Award
- ♦ Global War on Terrorism service Medal
- ♦ Air Force Training Ribbon
- ♦ Honorable Discharge

## REFERENCES

Brandi Mathern

(985) 278-0067

Dana Boockoff

(318) 243-3147

Kelsey Broussard



Alexis Schwertz

---

(985) 278-9554

Laura Anselmi

(985) 665-0745

# Anthony Collins

## Driver Supervisor

### Contact

2684 Verbena St  
504-330-2398  
Anthonyjr1128@yahoo.com

### Objective

Transport students to and from school safely. Lead and train drivers in school bus operation and safety.

### Education

Delgado Community College  
Business Management

### Experience

*September 2019 - Present*

Supervisor • Driver Supervisor • B&L Transportation

*May 2019 – September 2019*

Lead Driver • Driver • A&S Transportation

*2014 - 2019*

Owner Operator • Contractor • Hammond's Transportation

I have been a driver, lead driver, and owner operator of my own school buses. I am the driver supervisor at B&L Transportation.

### Key Skills

Safety  
Organization  
Communication

### Communication

Lead drivers in daily routing, pre and post trip routines.

### Leadership

Owner Operator – Hammond's Transportation

Lead Driver – A& S Transportation

Driver Supervisor – B&L Transportation

### References

Available upon request.

# Coversheet

## Proposed Revisions to the Policies and Procedures

<b>Section:</b>	III. Other Business
<b>Item:</b>	B. Proposed Revisions to the Policies and Procedures
<b>Purpose:</b>	Vote
<b>Submitted by:</b>	
<b>Related Material:</b>	Sect 1602 Purchasing (as revised 20200629).pdf Sect 700-702 Procurement (as revised 20200629) with track changes.pdf Sect 700-702 Procurement (as revised 20200629).pdf Sect 1602 Purchasing (as revised 20200629) with track changes.pdf

## **1602     *Purchasing***

### *Control Objective*

To ensure that goods and services are acquired at fair and reasonable prices and the highest personal standards of conduct are maintained in all relationships with vendors, suppliers, and subcontractors.

### *Major Controls*

#### **A.     Purchase Requirements**

Audubon Charter School has developed cost-effective and efficient purchase requirements to achieve full and open competition, meet delivery schedules, control inventory and material, and expedite purchases.

#### **B.     Required Competition**

See section 700 - Procurement

#### **C.     Selecting the Vendor**

Audubon Charter School elects the most responsive and responsible vendor to provide required materials and services, and promotes competition to obtain fair and reasonable prices.

#### **D.     Internal Accounting Controls**

Approval by the Board of Directors shall be made in accordance with procurement policies as written in section 700 - Procurement prior to contract/purchase order finalization. Adoption of policy that requires the reporting of unethical conduct to management and subsequent restitution of any gain resulting from such conduct.

### *Procedures*

#### **Purchase Requirements**

1.            After approval of the annual budget, the Chief Financial Officer should review Audubon Charter School's needs to discover patterns of orders and opportunities for clustering orders, to achieve volume discounts.
- 2            In preparing purchase requisitions, the Chief Executive Officer or designee should identify minimum needs.

#### **Processing Purchase Requisitions**

1.     *Purchase Requisitions* should be forwarded to a designated member of the office staff. This employee should prepare a spreadsheet, by vendor, for the items requisitioned.
2.     The *Purchase Requisitions* should include the following:
  - (i)   A description of items ordered
  - (ii)   A cost estimates
  - (iii) Required delivery information



- (iv) A statement of the nature and purpose of the procurement
- 3. *The Chief Financial Officer should approve purchase Requisitions*, after review of the budget.
- 4. The designated member of the office staff should present *Purchase Requisitions* to the Chief Executive Officer for review and approval.
- 5. Approved *Purchase Requisitions* should be forwarded to the Sr. Staff Accountant or Chief Financial Officer.

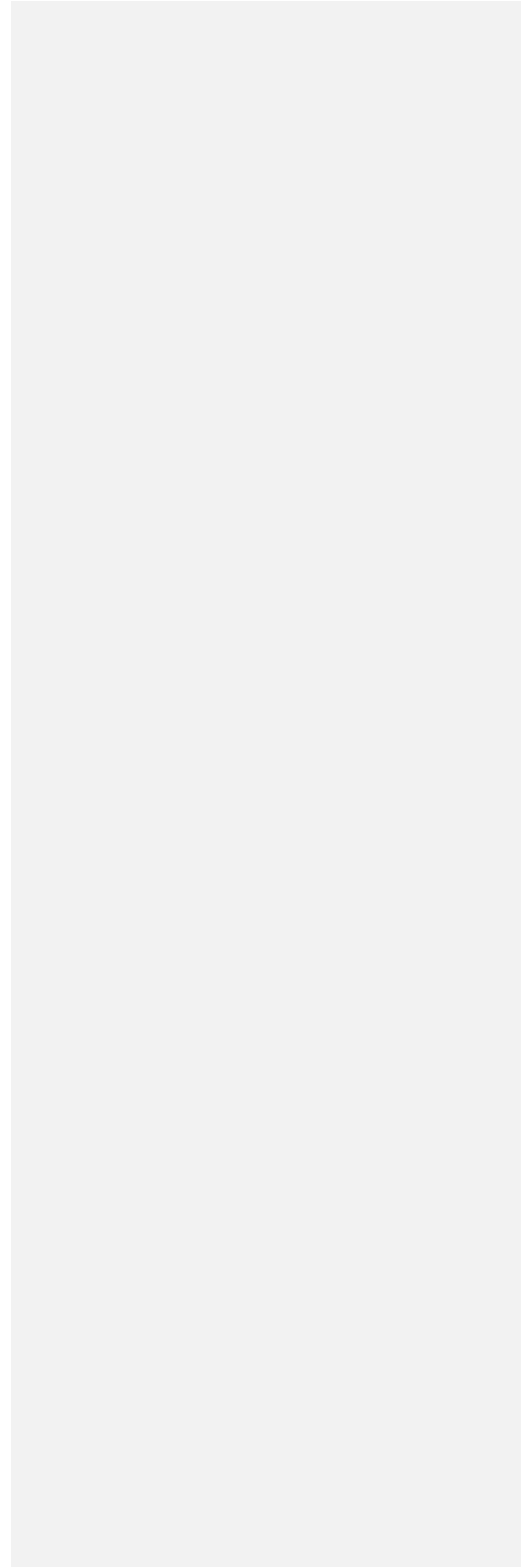
### **Processing Purchase Orders**

- 1. A Purchase Order should be prepared by the Chief Financial Officer or he or she should approve the information that was supplied by the designated Finance Staff member
- 2. Purchase Orders should be approved by the Chief Financial Officer and/or the Chief Executive Officer.

### **Contracts**

- 1. Consideration will be made of in-house capabilities to accomplish services before contracting for them.
- 2. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000.
  - a. Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the school.
- 3. Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors).
  - a. Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The CEO may also require that contract service providers list the school as an additional insured.
- 4. If the contract service provider is a sole proprietor or a partnership (including LP, and LLP), the Finance Department will obtain a W-9 from the contract service provider prior to submitting any requests for payments to Audubon.
- 5. The CEO will approve proposed contracts and modifications in writing or F.A.M.E. Board if applicable.
- 6. All contracts must be approved by the F.A.M.E. Board. Contracts in accordance with the procurement procedures fund in section 700 – Procurement. CEO or a designee may approve contracts up the amount of \$25,000. All contracts greater than \$15,000 must be presented as an information items to the F.A.M.E. Board

C. and properly reflected in the general ledger.



## 700 **PROCUREMENT POLICIES**

### 701 **Procurement – Goods and Services**

The Procurement policy, **not required, but is recommended.**

Procurement policies should outline procedures to promote competition and fairness for all contracted items. Audubon Charter School should procure only those items and services that are required to perform their missions and/or fill a bona fide need.

Audubon Charter School should will use a the below guidelines for cost and price analysis to ensure a competitive procurement process and establish criteria for awarding goods and service contracts. The criteria, may include the following:

#### Requisitions between \$0.01 and \$1,000 (including shipping cost and all other charges)

- These purchases are exempt from competition and will assigned a purchase order, requiring only a justification or rationale of business-related purpose.

**Formatted:** Font: (Default) Times New Roman, 12 pt

#### Requisitions between \$1,000.01 and \$5,000.00 (including shipping cost and all other charges)

- These purchases are exempt from competition, but the requestor is charged with obtaining the best price possible;
- A written copy of the vendor's price quote must be submitted with the purchase requisition

**Formatted:** Font: (Default) Times New Roman, 12 pt

#### Requisitions between \$5,000.01 and \$25,000.00 (including shipping cost and all other charges)

- These purchases require informal quotations;
- Purchase requisition must be accompanied by three (3) or more price quotations
- Informal quotations shall be attached in writing, email, facsimile quotes, internet prices and/or telephone quotations. (Note: "telephone quotation form" must be accompanied when telephone quotation utilized.)

**Formatted:** Font: (Default) Times New Roman, 12 pt

#### Requisitions between \$25,000.01 and \$99,999.99 (including shipping cost and all other charges)

- These purchases require formal quotations;
- Purchase requisition must be accompanied by three (3) or more written price quotations (when at all possible quotations shall be solicited from a certified small and emerging business enterprise or small entrepreneurship)
- Solicitation for these purchases shall be open for a minimum of three (3) working days
- Purchases meeting the criteria of LA R.S. 38.2211 shall follow the Public Bid Law requirements

**Formatted:** Font: (Default) Times New Roman, 12 pt

#### Requisitions greater than \$100,000 (including shipping cost and all other charges)

- These purchases require formal request for proposal (RFP);
- All specification for the goods or services requested must be attached to purchased requisition
- The CFO will issue request for proposal or invitation to bid to at least three preferably five potential vendors which must be mailed or electronically sent to the vendors;
- In addition, the request must be posted for advertisement for at least three (3) working;
- From the time the RFP is advertised the solicitation will be open for at least five (5) working days

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** Font: (Default) Times New Roman, 12 pt

- Multi-year contracts may be approved by the board of directors at their sole discretion. Authorization for renewals may be approved by the CEO up to three years from date of original contract.
- All bids for the erection, construction, alteration, improvement, or repair of a public facility or immovable property may require additional requirements in accordance with LA R.S. 38.2211 Public Bid Law.
- The final contract must be approved by the board of directors. Before board approval, Audubon Charter School must post a public request for proposal on its website, and management must present its analysis and recommendations to the board regarding responses to the RFP.

Formatted: Font: (Default) Times New Roman, 12 pt

Purchases will be monitored to determine if separate, sequential or component purchases are used to avoid the bid limits. In the absence of a good faith business basis, no purchase or procurement shall be artificially divided to avoid the competitive process or the solicitation of competitive sealed bids. The finance office may cancel bids or requisitions to combine like requirements thereby causing delays in the procurement process.

Formatted: Font: (Default) Times New Roman, 12 pt

Contracts less than \$5,000 — Use sound business practices.

#### Limited Competition

Formatted: Font: (Default) Times New Roman, 12 pt

- The following require telephone quotation from at least three (3) vendors, where feasible, even when amounts are in excess of \$5,000 but less than \$10,000, yet must be accompanied by "Telephone Quotation Form" or a memo documenting why three (3) quotes cannot be obtained.
- Facilities for meetings and conferences: If the facility requires use of in-house catering, photography audio visual or other services, these may be purchased from the facility. However, if the facility does not have such a policy, the purchase of the services must follow normal competition regulation based on amount;
- Facility repairs and maintenance when not covered under contractual services up to \$10,000.00;
- Bulk purchase of ordinary supplies and materials when purchased by the finance office through approved vendors, especially at start of school year.

#### Exemptions

Formatted: Font: (Default) Times New Roman, 12 pt

- Direct services to a child of Audubon Charter School may be procured without competitive bidding regardless of the cost;
- Items under contract can be purchased without competitive bidding regardless of the cost;
- Vendors or contracts approved or mandated by an authorizing agency can be purchased without competitive bidding regardless of the cost;
- Purchases of software up to \$100,000 are exempt from competition. Software and hardware maintenance under \$100,000 do not require competitive bidding;
- Publication and/or copyright materials purchased directly from the publisher or copyright holder are exempt from competitive bidding;
- Purchases may be exempt from competitive bidding if Proprietary specification can be justified (reasons why no other brand or model can be used for the is application) and the manufacturer confirms in writing that the vendor is a "Sole-Source." however, a "Proprietary Vendor Form" and/or "Sole Source Form" must be attached to purchase requisition and approved by CFO;

Formatted: Font: (Default) Times New Roman, 12 pt

- Repairs and/or parts associated with repairs to equipment may be obtained from an “Authorized Dealer” (Certified by the manufacturer to sell and/or perform maintenance on their equipment. However, for amounts greater than \$10,000.00 quotes must be attached;
- No competitive process is required for advertising; however, the CEO must certify that specific media is required to reach the targeted audience.

- ~~Contracts between \$5,000 and \$24,999—Seek quotes from at least three vendors and award the contract to the responsible vendor offering the supply or service needed for the best price.~~
- ~~Contracts >\$25,000—Conduct a formal advertised competition by issuing an invitation to bid or a request for proposals.~~

Formatted: No bullets or numbering

Documentation requirements – contracts in the amount of **\$5,000** or more must be in writing, and Audubon Charter School may not pay for any services or supplies prior to the execution of a written contract.

Audubon Charter School shall adhere to the following objectives:

1. Procurements will be completely impartial based strictly on the merits of supplier and contractor proposals and applicable, related considerations such as delivery, quantity, etc.
2. All purchases shall be in the best interests of Audubon Charter School and its funding sources.
3. Obtain quality supplies/services needed for delivery at the time and place required.
4. Buy from responsible and dependable sources of supply.
5. Obtain maximum value for all expenditures.
6. Deal fairly and impartially with all vendors.
7. Be above suspicion of unethical behavior always; avoid any conflict of interest, transactions with related parties or even the appearance of a conflict of interest in School supplier relationships.

- A. Audubon Charter School will execute a *Purchase Order* for all purchases, which shall be approved by the Chief Financial Officer for purchases less than **\$5,000** and by the Chief Executive Officer and the Chief Financial Officer for purchase greater than **\$5,000**.
- B. All lease agreements will be evidenced by a lease or sublease agreement approved by the Board of Director's and signed by the \_\_\_\_\_, CEO. The agreement will identify all the terms and conditions of the lease.

## 702 *Emergency Purchases*

~~An "emergency purchase" is the purchase of goods or services that are so badly needed that a School will suffer financial or operational damage if they are not secured immediately. A decision to purchase may be declared in an emergency at Audubon Charter School's discretion and "best value" procurement procedures must be followed. In addition, the purchase must be authorized by the Treasurer or another Board member.~~Emergency Exemptions

- May be declared in an emergency at Audubon Charter School's discretion
- Purchases classified as emergency purchases may be require limited or no competition "best value" procurement procedures.
- Purchase must be accompanied by memo, noting the urgency of the purchase and justification and cost and price analysis of the amount of the transaction
- Emergency purchases are defined as "purchases to protect the health, welfare and safety or public property." These purchases must:
  - Affect the health, life or safety of staff and students;
  - Are required to avoid financial or operational damage; and/or
  - Are required to immediately prevent actual work stoppage or service"

All emergency transactions must be signed by the Chief Financial Officer or Chief Executive Officer and must be authorized by the Treasurer or another Board member.

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** Normal, Right: 0.08", No bullets or numbering, No widow/orphan control, Don't adjust space between Latin and Asian text, Don't adjust space between Asian text and numbers, Font Alignment: Auto

**Formatted:** Font: (Default) Times New Roman, 12 pt

## 700 ***PROCUREMENT POLICIES***

### 701 ***Procurement – Goods and Services***

The Procurement policy, **not required, but is recommended.**

Procurement policies should outline procedures to promote competition and fairness for all contracted items. Audubon Charter School should procure only those items and services that are required to perform their missions and/or fill a bona fide need.

Audubon Charter School will use the below guidelines for cost and price analysis to ensure a competitive procurement process and establish criteria for awarding goods and service contracts. The criteria, may include the following:

Requisitions between \$0.01 and \$1,000 (including shipping cost and all other charges)

- These purchases are exempt from competition and will assigned a purchase order, requiring only a justification or rationale of business-related purpose

Requisitions between \$1,000.01 and \$5,000.00 (including shipping cost and all other charges)

- These purchases are exempt from competition, but the requestor is charged with obtaining the best price possible;
- A written copy of the vendor's price quote must be submitted with the purchase requisition

Requisitions between \$5,000.01 and \$25,000.00 (including shipping cost and all other charges)

- These purchases require informal quotations;
- Purchase requisition must be accompanied by three (3) or more price quotations
- Informal quotations shall be attached in writing, email, facsimile quotes, internet prices and/or telephone quotations. (Note: "telephone quotation form" must be accompanied when telephone quotation utilized.)

Requisitions between \$25,000.01 and \$99,999.99 (including shipping cost and all other charges)

- These purchases require formal quotations;
- Purchase requisition must be accompanied by three (3) or more written price quotations (when at all possible quotations shall be solicited from a certified small and emerging business enterprise or small entrepreneurship)
- Solicitation for these purchases shall be open for a minimum of three (3) working days
- Purchases meeting the criteria of LA R.S. 38.2211 shall follow the Public Bid Law requirements

Requisitions greater than \$100,000 (including shipping cost and all other charges)

- These purchases require formal request for proposal (RFP);
- All specification for the goods or services requested must be attached to purchased requisition
- The CFO will issue request for proposal or invitation to bid to at least three preferably five potential vendors which must be mailed or electronically sent to the vendors;

- In addition, the request must be posted for advertisement for at least three (3) working;
- From the time the RFP is advertised the solicitation will be open for at least five (5) working days
- Multi-year contracts may be approved by the board of directors at their sole discretion. Authorization for renewals may be approved by the CEO up to three years from date of original contract.
- All bids for the erection, construction, alteration, improvement, or repair of a public facility or immovable property may require additional requirements in accordance with LA R.S. 38.2211 Public Bid Law.
- The final contract must be approved by the board of directors. Before board approval, Audubon Charter School must post a public request for proposal on its website, and management must present its analysis and recommendations to the board regarding responses to the RFP.

Purchases will be monitored to determine if separate, sequential or component purchases are used to avoid the bid limits. In the absence of a good faith business basis, no purchase or procurement shall be artificially divided to avoid the competitive process or the solicitation of competitive sealed bids. The finance office may cancel bids or requisitions to combine like requirements thereby causing delays in the procurement process.

#### Limited Competition

- The following require telephone quotation from at least three (3) vendors, where feasible, even when amounts are in excess of \$5,000 but less than \$10,000, yet must be accompanied by "Telephone Quotation Form" or a memo documenting why three (3) quotes cannot be obtained.
- Facilities for meetings and conferences: If the facility requires use of in-house catering, photography audio visual or other services, these may be purchased from the facility. However, if the facility does not have such a policy, the purchase of the services must follow normal competition regulation based on amount;
- Facility repairs and maintenance when not covered under contractual services up to \$10,000.00;
- Bulk purchase of ordinary supplies and materials when purchased by the finance office through approved vendors, especially at start of school year.

#### Exemptions

- Direct services to a child of Audubon Charter School may be procured without competitive bidding regardless of the cost;
- Items under contract can be purchased without competitive bidding regardless of the cost;
- Vendors or contracts approved or mandated by an authorizing agency can be purchased without competitive bidding regardless of the cost;
- Purchases of software up to \$100,000 are exempt from competition. Software and hardware maintenance under \$100,000 do not require competitive bidding;
- Publication and/or copyright materials purchased directly from the publisher or copyright holder are exempt from competitive bidding;



- Purchases may be exempt from competitive bidding if Proprietary specification can be justified (reasons why no other brand or model can be used for the is application) and the manufacturer confirms in writing that the vendor is a “Sole-Source.” however, a “Proprietary Vendor Form” and/or “Sole Source Form” must be attached to purchase requisition and approved by CFO;
- Repairs and/or parts associated with repairs to equipment may be obtained from an “Authorized Dealer” (Certified by the manufacturer to sell and/or perform maintenance on their equipment. However, for amounts greater than \$10,000.00 quotes must be attached;
- No competitive process is required for advertising; however, the CEO must certify that specific media is required to reach the targeted audience.

Documentation requirements – contracts in the amount of **\$5,000** or more must be in writing, and Audubon Charter School may not pay for any services or supplies prior to the execution of a written contract.

Audubon Charter School shall adhere to the following objectives:

1. Procurements will be completely impartial based strictly on the merits of supplier and contractor proposals and applicable, related considerations such as delivery, quantity, etc.
  2. All purchases shall be in the best interests of Audubon Charter School and its funding sources.
  3. Obtain quality supplies/services needed for delivery at the time and place required.
  4. Buy from responsible and dependable sources of supply.
  5. Obtain maximum value for all expenditures.
  6. Deal fairly and impartially with all vendors.
  7. Be above suspicion of unethical behavior always; avoid any conflict of interest, transactions with related parties or even the appearance of a conflict of interest in School supplier relationships.
- A. Audubon Charter School will execute a *Purchase Order* for all purchases, which shall be approved by the Chief Financial Officer for purchases less than **\$5,000** and by the Chief Executive Officer and the Chief Financial Officer for purchase greater than **\$5,000**.
  - B. All lease agreements will be evidenced by a lease or sublease agreement approved by the Board of Director’s and signed by the CEO. The agreement will identify all the terms and conditions of the lease.

## **702      *Emergency Purchases***

### **Emergency Exemptions**

- May be declared in an emergency at Audubon Charter School's discretion
- Purchases classified as emergency purchases may be require limited or no competition "best value" procurement procedures
- Purchase must be accompanied by memo, noting the urgency of the purchase and justification and cost and price analysis of the amount of the transaction
- Emergency purchases are defined as "purchases to protect the health, welfare and safety or public property." These purchases must:
  - Affect the health, life or safety of staff and students;
  - Are required to avoid financial or operational damage; and/or
  - Are required to immediately prevent actual work stoppage or service"

All emergency transactions must be signed by the Chief Financial Officer or Chief Executive Officer and must be authorized by the Treasurer or another Board member.

## 1602 Purchasing

### Control Objective

To ensure that goods and services are acquired at fair and reasonable prices and the highest personal standards of conduct are maintained in all relationships with vendors, suppliers, and subcontractors.

### Major Controls

#### A. Purchase Requirements

Audubon Charter School has developed cost-effective and efficient purchase requirements to achieve full and open competition, meet delivery schedules, control inventory and material, and expedite purchases.

#### B. Required Competition

~~Audubon Charter School utilizes the following procurement procedures:~~

~~Contracts under \$5,000—Audubon Charter School uses sound business practices when procuring goods and services for *(any single item)* amounts less than \$5,000.~~

~~Contracts from \$5,000 To \$20,000—Audubon Charter School seeks price quotes for *(any single item)* from at least three vendors and awards the contract to a responsible vendor offering the supply or service needed for the lowest price.~~

~~Contracts greater \$20,000—Audubon Charter School conducts a formal advertised competition using sealed bids or proposals for *(any single item)*. An award is offered to the qualified bidder who meets Audubon Charter School's specifications and offers the lowest price. See section 700 - Procurement~~

Commented [JA1]: Maybe remove section

#### C. Selecting the Vendor

Audubon Charter School elects the most responsive and responsible vendor to provide required materials and services, and promotes competition to obtain fair and reasonable prices.

#### D. Internal Accounting Controls

(i) Approval by the Board of Directors ~~of purchases equal to or exceeding \$20,000~~ shall be made in accordance with procurement policies as written in section 700 - Procurement prior to contract/purchase order finalization.

(ii) Adoption of policy that requires the reporting of unethical conduct to management and subsequent restitution of any gain resulting from such conduct.

Formatted: No bullets or numbering

Formatted: Right: 0.13", No bullets or numbering

## Procedures

### Purchase Requirements

1. After approval of the annual budget, the Chief Financial Officer should review Audubon Charter School's needs to discover patterns of orders and opportunities for clustering orders, to achieve volume discounts.
- 2 In preparing purchase requisitions, the Chief Executive Officer or designee should identify minimum needs.

### Processing Purchase Requisitions

1. *Purchase Requisitions* should be forwarded to a designated member of the office staff. This employee should prepare a spreadsheet, by vendor, for the items requisitioned.
2. The *Purchase Requisitions* should include the following:
  - (i) A description of items ordered
  - (ii) A cost estimates
  - (iii) Required delivery information
  - (iv) A statement of the nature and purpose of the procurement
3. The *Chief Financial Officer* should approve *purchase Requisitions*, after review of the budget.
4. The designated member of the office staff should present *Purchase Requisitions* to the Chief Executive Officer for review and approval.
5. Approved *Purchase Requisitions* should be forwarded to the Sr. Staff Accountant or Chief Financial Officer.

### Processing Purchase Orders

1. A Purchase Order should be prepared by the Chief Financial Officer or he or she should approve the information that was supplied by the designated Finance Staff member
1. Purchase Orders should be approved by the Chief Financial Officer and/or the Chief Executive Officer. A Purchase Order should be prepared by the Chief Financial Officer or he or she should approve the information that was supplied by the Sr. Staff Accountant
2. Before a Purchase Order is sent to a supplier, it should be reviewed by the Chief Financial Officer for accuracy of dates, account coding, quantities listed, budget and amounts.
3. Purchase Orders should be approved by the Chief Financial Officer or the Chief Executive Officer.
- 2.

### Contracts

1. Consideration will be made of in-house capabilities to accomplish services before contracting for them.
2. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of need for any contracts over \$5,000.
  - a. Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the school.
3. Written contracts clearly defining work to be performed will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors).

**Formatted:** Indent: Left: 0.19", Numbered + Level: 1 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 0.25" + Indent at: 0.5"

**Formatted:** List Paragraph, Indent: Left: 0.19", Right: 0", Space Before: 0 pt, Numbered + Level: 1 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 0.25" + Indent at: 0.5", Widow/Orphan control, Adjust space between Latin and Asian text, Adjust space between Asian text and numbers, Tab stops: Not at 0.77" + 0.77"

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** Font: (Default) Times New Roman, 12 pt, Bold

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** List Paragraph, Indent: Left: 0", Numbered + Level: 2 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 0.98" + Indent at: 1.38"

**Formatted:** List Paragraph, Outline numbered + Level: 2 + Numbering Style: a, b, c, ... + Aligned at: 0.75" + Indent at: 1"

**Formatted:** List Paragraph, Indent: Left: 0", Numbered + Level: 2 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 0.98" + Indent at: 1.38"

a. Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The CEO may also require that contract service providers list the school as an additional insured.

**Formatted:** List Paragraph, Outline numbered + Level: 2 + Numbering Style: a, b, c, ... + Aligned at: 0.75" + Indent at: 1"

4. If the contract service provider is a sole proprietor or a partnership (including LP, and LLP), the Finance Department will obtain a W-9 from the contract service provider prior to submitting any requests for payments to Audubon.

**Formatted:** List Paragraph, Indent: Left: 0", Numbered + Level: 2 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 0.98" + Indent at: 1.38"

5. The CEO will approve proposed contracts and modifications in writing or F.A.M.E. Board if applicable.

6. All contracts must be approved by the F.A.M.E. Board. Contracts in accordance with the procurement procedures fund in section 700 – Procurement. CEO or a designee may approve contracts up the amount of \$25,000. All contracts greater than \$15,000 must be presented as an information items to the F.A.M.E. Board.

**Formatted:** List Paragraph, Indent: Left: 0", Numbered + Level: 2 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 0.98" + Indent at: 1.38"

**Formatted:** Font: (Default) Times New Roman, 12 pt

**Formatted:** Font: (Default) Times New Roman, 12 pt

#### **Obtaining Bids and Quotations**

1. The Chief Financial Officer should request bids or quotations verbally on transactions not expected to exceed \$5,000, and in writing for transactions between \$5,000 and \$20,000. Items greater than \$20,000 will require formal bid requests and evaluation before *Purchase Order* is issued.
2. In evaluating bids received, the Chief Financial Officer should perform and document a cost or price analysis.

# Coversheet

## Proposed Pay Period Changes

<b>Section:</b>	III. Other Business
<b>Item:</b>	C. Proposed Pay Period Changes
<b>Purpose:</b>	Vote
<b>Submitted by:</b>	
<b>Related Material:</b>	Proposed Pay Periods Changes.pdf





Calvin Tregre &lt;cstregre@gmail.com&gt;

## Pay period approval

1 message

Kendal Turner &lt;Kendal\_Turner@auduboncharter.com&gt;

Tue, Jun 30, 2020 at 9:21 AM

To: Calvin Tregre &lt;cstregre@gmail.com&gt;

Modified				
pay period start	pay period end	workdays (including paid holidays)	pay date	
7/1/2020	7/15/2020	10	7/15/2020	Independence Day
7/16/2020	7/31/2020	12	7/31/2020	
8/1/2020	8/12/2020	8	8/14/2020	
8/13/2020	8/24/2020	8	8/31/2020	
8/25/2020	9/7/2020	9	9/15/2020	Labor Day
9/8/2020	9/21/2020	10	9/30/2020	
9/22/2020	10/7/2020	12	10/9/2020	
10/8/2020	10/21/2020	5	10/31/2020	Fall Break
10/22/2020	11/7/2020	12	11/13/2020	
11/8/2020	11/21/2020	8	11/30/2020	Veterans Day/Thanksgiving
11/22/2020	12/7/2020	6	12/15/2020	
12/8/2020	12/21/2020	9	12/31/2020	Christmas Break
12/22/2020	1/7/2021	2	1/15/2021	Winter Break
1/8/2021	1/21/2021	9	1/29/2021	MLK Day
1/22/2021	2/7/2021	11	2/15/2021	
2/8/2021	2/21/2021	4	2/26/2021	President's Day/Mardi Gras
2/22/2021	3/7/2021	10	3/15/2021	
3/8/2021	3/21/2021	10	3/31/2021	
3/22/2021	4/7/2021	9	4/15/2021	Easter/Spring Day
4/8/2021	4/21/2021	8	4/30/2021	
4/22/2021	5/7/2021	12	5/15/2021	
5/8/2021	5/21/2021	10	5/31/2021	
5/22/2021	6/7/2021	10	6/15/2021	Memorial Day
6/8/2021	6/21/2021	13	6/30/2021	
6/22/2021	7/7/2021	8	7/15/2021	Independence Day



# Coversheet

## Contract Renewals for Pest Control & Termites Control

<b>Section:</b>	III. Other Business
<b>Item:</b>	D. Contract Renewals for Pest Control & Termites Control
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	Brans_Termite Contract_Broadway Campus.pdf Brans_Pest Control_Broadway.pdf Brans_Termite Contract_Milan Campus.pdf Brans_Pest Control_Gentilly.pdf Brans_Termite Contract_Gentilly Campus.pdf Brans_Pest Control_Milan.pdf

## TERMITE CONTROL SERVICE AGREEMENT BETWEEN

**AUDUBON CHARTER**  
**428 BROADWAY**  
**NEW ORLEANS, LA 70118**

**BRANS PEST CONTROL, LLC**  
**1921 CORPORATE SQUARE, STE F**  
**SLIDELL, LA 70458**

- 1.) Brans Pest Control, LLC agrees to provide termite control services to Audubon Charter
- 2.) Brans Pest Control, LLC will abide by the rules set aside by the Louisiana Department of Agriculture and Forestry (LDAF) in performing the work for termite control. This agreement does not supersede the Standard State contract signed by school representative and Brans Pest Control, LLC
- 3.) Audubon Charter agrees to make the place of service available for treatment and/or inspection as often as necessary to control covered pests.
- 4.) This agreement shall be valid for twelve (12) months.
- 5.) After the initial twelve (12) months, this agreement may be cancelled by either party giving thirty (30) days written notice to the other party.
- 6.) This agreement does not provide for the repair of present or future damages to the service address (es), nor does it provide reimbursement for repair expenses allegedly arising from pest infestations.
- 7.) In entering this agreement, customer waives all claims for damages to property or injuries to persons, which may result directly or indirectly from work performed by the company.
- 8.) Payment is expected within 30 days of the service. At the discretion of Brans Pest Control, LLC, there will be a late charge fee applied at a rate of \$10.00 per thirty (30) days.
- 9.) Agreement period is from July 1, 2020 through June 30, 2021

The annual renewal is \$1800.00.

\_\_\_\_\_  
Authorized Company (Brans Pest Control) Signature

  
\_\_\_\_\_  
Authorized Customer Signature (School Name)

\_\_\_\_\_  
Date

6-24-2020

\_\_\_\_\_  
Date

## **PEST CONTROL SERVICE AGREEMENT BETWEEN**

**AUDUBON CHARTER SCHOOL**

**BRANS PEST CONTROL, LLC**

**428 BROADWAY**

**1921 CORPORATE SQUARE DR**

**NEW ORLEANS, LA 70118**

**SLIDELL, LA 70458**

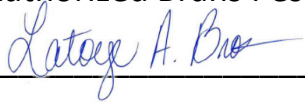
- 1.) Brans Pest Control, LLC agrees to provide pest control services to Audubon Charter
- 2.) Brans Pest Control, LLC will provide service at least once per month. Extra services for the covered pests will be provided at no additional charge.
- 3.) Audubon Charter agrees to make the place of service available for treatment and/ or inspection as often as necessary to control covered pests.
- 4.) If necessary, Audubon Charter will repair the building in the event Brans Pest Control, LLC finds that an infestation is a result of a construction flaw. The repairs will be done in a timely fashion. If not repaired and the infestation continues, Brans Pest Control, LLC will charge for additional services until repairs are made.
- 5.) Pests covered under this agreement include roaches, ants, silverfish, spiders (excluding brown recluse, black widow and brown widow), rodents and wasps.
- 6.) This agreement shall be valid for twelve (12) months. After the initial twelve (12) months, this agreement may be cancelled by either party giving thirty (30) days written notice to the other party. Contract date begins July 1, 2020
- 7.) In entering into this agreement, customer waives all claims for damages to property or injuries to persons which may result directly or indirectly from work performed by the company. In addition this agreement does not provide for the repair of past, present or future damages to the service address (es) nor does it provide reimbursement for repair expenses allegedly arising from pest infestations.
- 8.) This agreement does not include service for termites or other wood destroying organisms nor does it provide for damage remediation arising from the infestation of the same.

- 9.) Payment is expected within thirty (30) days of the service. At the discretion of Brans Pest Control, LLC, there may be a late charge fee applied at a rate of ten percent (10%) of the standard fee per thirty (30) days.

**The price for monthly pest control service is \$230.00 per month**

---

Authorized Brans Pest Control Signature



---

Date

---

6-24-2020

Authorized School Signature

Date

## TERMITE CONTROL SERVICE AGREEMENT BETWEEN


**AUDUBON UPPER SCHOOL  
1111 MILAN ST  
NEW ORLEANS, LA 70115**

**BRANS PEST CONTROL, LLC  
1921 CORPORATE SQUARE, STE F  
SLIDELL, LA 70458**

- 1.) Brans Pest Control, LLC agrees to provide termite control services to Audubon Upper School
- 2.) Brans Pest Control, LLC will abide by the rules set aside by the Louisiana Department of Agriculture and Forestry (LDAF) in performing the work for termite control. This agreement does not supersede the Standard State contract signed by school representative and Brans Pest Control, LLC
- 3.) Audubon Upper School agrees to make the place of service available for treatment and/or inspection as often as necessary to control covered pests.
- 4.) This agreement shall be valid for twelve (12) months.
- 5.) After the initial twelve (12) months, this agreement may be cancelled by either party giving thirty (30) days written notice to the other party.
- 6.) This agreement does not provide for the repair of present or future damages to the service address (es), nor does it provide reimbursement for repair expenses allegedly arising from pest infestations.
- 7.) In entering this agreement, customer waives all claims for damages to property or injuries to persons, which may result directly or indirectly from work performed by the company.
- 8.) Payment is expected within 30 days of the service. At the discretion of Brans Pest Control, LLC, there will be a late charge fee applied at a rate of \$10.00 per thirty (30) days.
- 9.) Agreement period is from July 1, 2020 through June 30, 2021

The annual renewal is \$1824.00.

\_\_\_\_\_  
Authorized Company (Brans Pest Control) Signature



\_\_\_\_\_  
Authorized Customer Signature (School Name)

\_\_\_\_\_  
Date

6-24-2020

\_\_\_\_\_  
Date

## **PEST CONTROL SERVICE AGREEMENT BETWEEN**

**AUDUBON GENTILLY**

**BRANS PEST CONTROL, LLC**

**4720 PAINTERS ST**

**1921 CORPORATE SQUARE DR**

**NEW ORLEANS, LA 70122**

**SLIDELL, LA 70458**

- 1.) Brans Pest Control, LLC agrees to provide pest control services to Audubon Gentilly
- 2.) Brans Pest Control, LLC will provide service at least once per month. Extra services for the covered pests will be provided at no additional charge.
- 3.) Audubon Gentilly agrees to make the place of service available for treatment and/ or inspection as often as necessary to control covered pests.
- 4.) If necessary, Audubon Gentilly will repair the building in the event Brans Pest Control, LLC finds that an infestation is a result of a construction flaw. The repairs will be done in a timely fashion. If not repaired and the infestation continues, Brans Pest Control, LLC will charge for additional services until repairs are made.
- 5.) Pests covered under this agreement include roaches, ants, silverfish, spiders (excluding brown recluse, black widow and brown widow), rodents and wasps.
- 6.) This agreement shall be valid for twelve (12) months. After the initial twelve (12) months, this agreement may be cancelled by either party giving thirty (30) days written notice to the other party. Contract date begins July 1, 2020
- 7.) In entering into this agreement, customer waives all claims for damages to property or injuries to persons which may result directly or indirectly from work performed by the company. In addition this agreement does not provide for the repair of past, present or future damages to the service address (es) nor does it provide reimbursement for repair expenses allegedly arising from pest infestations.
- 8.) This agreement does not include service for termites or other wood destroying organisms nor does it provide for damage remediation arising from the infestation of the same.

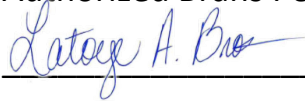


- 9.) Payment is expected within thirty (30) days of the service. At the discretion of Brans Pest Control, LLC, there may be a late charge fee applied at a rate of ten percent (10%) of the standard fee per thirty (30) days.

**The price for monthly pest control service is \$250.00 per month**

---

Authorized Brans Pest Control Signature



---

Date

---

6-24-2020

Authorized School Signature

Date

## TERMITE CONTROL SERVICE AGREEMENT BETWEEN

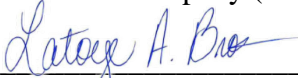
**AUDUBON GENTILLY**  
**4720 PAINTERS ST**  
**NEW ORLEANS, LA 70122**

**BRANS PEST CONTROL, LLC**  
**1921 CORPORATE SQUARE, STE F**  
**SLIDELL, LA 70458**

- 1.) Brans Pest Control, LLC agrees to provide termite control services to Audubon Gentilly
- 2.) Brans Pest Control, LLC will abide by the rules set aside by the Louisiana Department of Agriculture and Forestry (LDAF) in performing the work for termite control. This agreement does not supersede the Standard State contract signed by school representative and Brans Pest Control, LLC
- 3.) Audubon Gentilly agrees to make the place of service available for treatment and/or inspection as often as necessary to control covered pests.
- 4.) This agreement shall be valid for twelve (12) months.
- 5.) After the initial twelve (12) months, this agreement may be cancelled by either party giving thirty (30) days written notice to the other party.
- 6.) This agreement does not provide for the repair of present or future damages to the service address (es), nor does it provide reimbursement for repair expenses allegedly arising from pest infestations.
- 7.) In entering this agreement, customer waives all claims for damages to property or injuries to persons, which may result directly or indirectly from work performed by the company.
- 8.) Payment is expected within 30 days of the service. At the discretion of Brans Pest Control, LLC, there will be a late charge fee applied at a rate of \$10.00 per thirty (30) days.
- 9.) Agreement period is from July 1, 2020 through June 30, 2021

The annual renewal is \$1960.00.

\_\_\_\_\_  
Authorized Company (Brans Pest Control) Signature

  
\_\_\_\_\_  
Authorized Customer Signature (School Name)

\_\_\_\_\_  
Date

6-24-2020

\_\_\_\_\_  
Date

## **PEST CONTROL SERVICE AGREEMENT BETWEEN**

**AUDUBON UPPER SCHOOL**

**BRANS PEST CONTROL, LLC**

**1111 MILAN ST**

**1921 CORPORATE SQUARE DR**

**NEW ORLEANS, LA 701115**

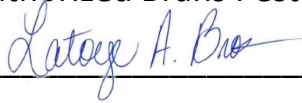
**SLIDELL, LA 70458**

- 1.) Brans Pest Control, LLC agrees to provide pest control services to Audubon Upper School
- 2.) Brans Pest Control, LLC will provide service at least once per month. Extra services for the covered pests will be provided at no additional charge.
- 3.) Audubon Upper School agrees to make the place of service available for treatment and/ or inspection as often as necessary to control covered pests.
- 4.) If necessary, Audubon Upper School will repair the building in the event Brans Pest Control, LLC finds that an infestation is a result of a construction flaw. The repairs will be done in a timely fashion. If not repaired and the infestation continues, Brans Pest Control, LLC will charge for additional services until repairs are made.
- 5.) Pests covered under this agreement include roaches, ants, silverfish, spiders (excluding brown recluse, black widow and brown widow), rodents and wasps.
- 6.) This agreement shall be valid for twelve (12) months. After the initial twelve (12) months, this agreement may be cancelled by either party giving thirty (30) days written notice to the other party. Contract date begins July 1, 2020
- 7.) In entering into this agreement, customer waives all claims for damages to property or injuries to persons which may result directly or indirectly from work performed by the company. In addition this agreement does not provide for the repair of past, present or future damages to the service address (es) nor does it provide reimbursement for repair expenses allegedly arising from pest infestations.
- 8.) This agreement does not include service for termites or other wood destroying organisms nor does it provide for damage remediation arising from the infestation of the same.

- 9.) Payment is expected within thirty (30) days of the service. At the discretion of Brans Pest Control, LLC, there may be a late charge fee applied at a rate of ten percent (10%) of the standard fee per thirty (30) days.

**The price for monthly pest control service is \$195.00 per month**

\_\_\_\_\_  
Authorized Brans Pest Control Signature



\_\_\_\_\_  
Date

6-24-2020

\_\_\_\_\_  
Authorized School Signature

\_\_\_\_\_  
Date