



F.A.M.E., Inc.

July Board Meeting

Date and Time

Saturday July 11, 2020 at 10:00 AM CDT

Location

428 Broadway

New Orleans, LA 70118

Topic: July Board Meeting

Time: Jul 11, 2020 010:00 AM Central Time (US and Canada)

Join Zoom Meeting

<https://zoom.us/j/93077426160?pwd=OTlnT2pTL3lkVFJYTnNTcC81S0FkQT09>

Meeting ID: 930 7742 6160

Password: 759467

One tap mobile

+13017158592,,93077426160#,,1#,759467# US (Germantown)

+13126266799,,93077426160#,,1#,759467# US (Chicago)

Agenda

I. Opening Items

Opening Items

A. Call the Meeting to Order

B. Record Attendance and Guests

C. Approve Minutes

It is recommended that the board approve the minutes from the May 30,2020 meeting with any suggested modifications or changes.

Approve minutes for Board Meeting on May 30, 2020

II. Finance Committee

Finance Committee

A. Financial Statement May 2020

Review the May 2020 Financial Statements of Audubon Schools

B. 2020-2021 Operating Budget

The Finance Committee recommends the approval of the 2020-2021 Operating Budget as presented with suggested modifications.

C. Recommendation to Approve a Contract for Bus Transportation Services

The Finance Committee recommends that the board approve the contract for bus transportation services as presented with any suggested modifications and revisions.

D. Recommendation to Approve Proposed Pay Period Changes

The Finance Committee recommends that the board approve the proposed pay period changes as presented.

E. Recommendation to Approve Proposed Revisions to Financial Policies and Procedures

The Finance Committee recommends that the board approves the proposed revisions to the financial policies and procedures as presented.

III. CEO Search

A. CEO Search Updates

The CEO Search Committee Chairperson will provide updates on the search process and next steps.

IV. CEO's Report

A. Academic Report

The Administration will provide Reopening Plans.

B. Training Center Update

C. Operations Report

D. Development Report

E. Parent Reports

V. Closing Items

A. Announcements

The next meeting of the FAME Board will take place on Saturday, August 22, 2020 beginning at 10 am. More information regarding this meeting will be sent out at a later time.

B. Adjourn Meeting

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

Coversheet

Approve Minutes

Section:	I. Opening Items
Item:	C. Approve Minutes
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Board Meeting on May 30, 2020

APPROVED



F.A.M.E., Inc.

Minutes

Board Meeting

Date and Time

Saturday May 30, 2020 at 10:00 AM

Location

428 Broadway Street, New Orleans, LA 70118, Cafeteria

Topic: FAME Board Meeting

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

Join Zoom Meeting

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

Meeting ID: 998 0950 2582

Password: 203588

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

Directors Present

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

Directors Absent

B. Connick, C. Lawson, L. Moran, M. Russell

Ex Officio Members Present

L. Brown

Non Voting Members Present

L. Brown

Guests Present

--442 (phone guest), ***-***-756 (phone guest), A. Collopy (remote), Andree Sampson, Charles West, Cheryl Jones, Cynthia Costello, D. LaViscount (remote), Daniel Held, Darleen Mipro, Dollie Eaglin, Elizabeth Dunneback, J. Anderson (remote), Koneca West, L. Spearman, L. Vermeulen (remote), Laura Reiff, M. Butler (remote), M. Forcier, Tasha Foster, Taylor Vuona, Toya Shanklin, Van Tran

I. Opening Items

A. Call the Meeting to Order

J. Jalice called a meeting of the board of directors of F.A.M.E., Inc. to order on Saturday May 30, 2020 at 10:10 AM.

B. Record Attendance and Guests

C. Approve Minutes

R. Fernandez made a motion to approve the minutes from Board Meeting on 04-25-20.

C. Tregre seconded the motion.

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

II. Finance Committee

A. Policy on IT Procedures

C. Tregre made a motion to on recommendation of the Finance Committee, approve the Policy on IT Procedures as presented with suggested modifications and revisions.

R. Fernandez seconded the motion.

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

B. Form 990 (Fiscal Year June 2019)

C. Tregre made a motion to on the recommendation of the Finance Committee, approve the presented Form 990 for the fiscal year ended June 2019.

R. Fernandez seconded the motion.

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

C. 2020-2021 Operating Budget Draft Review

Operating Budget Draft reviewed by CFO with FAME Board. Addressed questions posed by board members and audience members posed via phone/Zoom participation.

D. Contract Approval

R. Fernandez made a motion to approve the recommendation of the administration to accept a contract with Young Audiences in the amount of \$87,457.50 to continue to provide Arts education and after school programming to Audubon Gentilly for the 2020-2021 school year.

T. Lasher seconded the motion.

Questions posed regarding the ability of the organization to pay less than contracted amount in the event of continued school closure or distance learning needs.

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

E. Financial Statement April 2020

III. Other Business

A. Strategic Plan Draft Review

Review of Strategic Plan Draft as prepared by Bellwether Education Partners was presented by the CEO.

Public comment on the plan were offered by board members and the public regarding:

- language/terminology used in explaining the financial forecast
- the timing of stakeholder involvement
- next steps

B. CEO Search Committee Update

IV. CEO's Report

A. Academic Report

Comment posed by public regarding staff attrition rates

B. Training Center Update

C. Operations Report

Comment provided by board member asking to see historical attrition numbers for student turnover

D.

Development Report

E. Parent Reports

V. Closing Items

A. Announcements

Next board meeting will be postponed from June 20, 2020 to July 11, 2020.

Finance Committee meeting will take place on Thursday, July 2, 2020. Budget will be reviewed once again.

Budget Hearing will take place prior to the board meeting on July 11, 2020.

Board Retreat is postponed from June until August or September with identification of new CEO.

B. Adjourn Meeting

R. Fernandez made a motion to adjourn the meeting.

C. Tregre seconded the motion.

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

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 11:32 AM.

Respectfully Submitted,

L. Brown

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

Coversheet

Financial Statement May 2020

Section:	II. Finance Committee
Item:	A. Financial Statement May 2020
Purpose:	Discuss
Submitted by:	
Related Material:	2005 ACS Financial Statement.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.

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**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	\$ 2,394,315
Accounts receivable	648,822
Investments	999,392
Prepaid expenses and other current assets	<u>18,845</u>

Total current assets 4,061,374

PROPERTY AND EQUIPMENT, net 3,794,776

TOTAL ASSETS \$ 7,856,150

LIABILITIES AND NET ASSETS

CURRENT LIABILITIES

Accounts payable and accrued expenses	\$ 122,420
Accrued salaries and benefits payable	1,108,142
Deferred revenues	<u>61,582</u>

Total current liabilities 1,292,144

LONG TERM LIABILITIES

Note Payable	<u>3,973,399</u>
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Total long term liabilities 3,973,399

NET ASSETS

Unrestricted net assets	<u>2,590,605</u>
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TOTAL LIABILITIES AND NET ASSETS \$ 7,856,150

**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**

	AUDUBON UPTOWN Actual	AUDUBON GENTILLY Actual	AUDUBON CENTRAL OFFICE Actual	TOTAL	% ACHIEVED OF ANNUAL
REVENUES AND SUPPORT					
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	1,047,282	181,597	-	\$ 1,228,879	60%
Private grants and donations	219,626	57,278	-	\$ 276,904	49%
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%
EXPENSES					
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	168,615	32,813	12,542	\$ 213,970	51%
Purchased services	870,465	194,452	69,819	\$ 1,134,736	119%
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	38,965	123,445	-	\$ 162,410	82%
Total expenses	9,682,624	2,562,001	971,192	13,215,817	103%
CHANGE IN NET ASSETS	\$ (505,742)	\$ (546,536)	\$ (971,192)	\$ (2,023,470)	
NET ASSETS - Beginning of period				4,614,075	
NET ASSETS - End of period				\$ 2,590,605	

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**FRENCH AND MONTESSORI EDUCATION INCORPORATED
D/B/A AUDUBON CHARTER SCHOOL
STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS AND BUDGET COMPARISON
FOR THE MONTH ENDED MAY 31, 2020**

	AUDUBON UPTOWN Actual	AUDUBON GENTILLY Actual	AUDUBON CENTRAL OFFICE Actual	Total	Budeted	Variance
REVENUES AND SUPPORT						
MFP revenues	\$ 679,099	\$ 217,257	-	\$ 896,356	\$ 747,759	148,597
Fee revenues	20,949	16,302	-	37,251	\$ 37,230	21
Public grants and program funding	66,101	1,750	-	67,851	\$ 205,778	(137,927)
Private grants and donations	9,062	4,300	-	13,362	\$ 56,900	(43,538)
Income from investments	17,448	22	-	17,470	\$ 1,250	16,220
Other income	2,076	175	-	2,251	\$ 50,937	(48,686)
Released from restrictions					\$ -	-
Total revenues and support	<u>794,735</u>	<u>239,806</u>	<u>-</u>	<u>1,034,541</u>	<u>1,099,854</u>	<u>(65,313)</u>
EXPENSES						
Salaries	\$ 789,438	\$ 160,657	\$ 57,709	\$ 1,007,804	\$ 613,994	393,810
Benefits	291,986	21,961	17,190	331,137	\$ 183,800	147,337
Disposal	696	349	-	1,045	\$ 1,900	(855)
Dues	9,435	571	-	10,006	\$ 10,000	6
Food service	9,519	1,186	-	10,705	\$ 41,652	(30,947)
Insurance	6,998	2,333	-	9,331	\$ 18,647	(9,316)
Materials	8,834	965	-	9,799	\$ 35,151	(25,352)
Purchased services	118,224	14,504	9,443	142,171	\$ 106,002	36,169
Rentals	2,180	-	-	2,180	\$ 2,070	110
Repairs and maintenance	12,837	6,242	-	19,079	\$ 18,600	479
Travel	-	-	-	-	\$ 3,708	(3,708)
Utilities	14,411	3,322	-	17,733	\$ 20,708	(2,975)
Depreciation	6,103	8,335	-	14,438	\$ 14,583	(145)
Other expenses	-	288	462	750	\$ 1,875	(1,125)
Debt Service	-	-	-	-	\$ 11,000	(11,000)
Student Transportation	-	-	-	-	\$ 19,800	(19,800)
Total expenses	<u>1,270,661</u>	<u>220,713</u>	<u>84,804</u>	<u>1,576,178</u>	<u>1,103,490</u>	<u>472,688</u>
CHANGE IN NET ASSETS				\$ (541,637)	\$ (3,636)	\$ (538,001)
NET ASSETS - Beginning of month				<u>3,132,243</u>		
NET ASSETS - End of month				<u><u>\$ 2,590,606</u></u>		

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FRENCH AND MONTESSORI EDUCATION INCORPORATED
D/B/A AUDUBON CHARTER SCHOOL
STATEMENT OF CASH FLOWS
FOR THE MONTH ENDED MAY 31, 2020

Cash Flows from Operating Activities

Changes in Net Assets	\$ (2,023,470)
Adjustments to Reconcile Change in Net Assets to	
Net Cash Provided by Operating Activities	
Net Realized and Unrealized Loss on Investments	(29,957)
Depreciation	158,825
(Increase) Decrease in Assets	-
Accounts Receivable	251,459
Interest Receivable	4,913
Prepaid Expenses	16,899
Increase (Decrease) in Liabilities	-
Accounts Payable	(226,002)
Accrued liabilities	424,723
Deferred Revenue	(40,455)
Total Adjustments	<u>560,405</u>
Net Cash Provided by Operating Activities	<u>\$ (1,463,065)</u>

Cash Flows from Investing Activities

Sale of Investments	(48,357)
Purchases of Fixed Assets	<u>(367,803)</u>
Net Cash Used in Investing Activities	<u>\$ (416,160)</u>

Cash Flows from Financing Activities

Long term note payable	<u>3,973,399</u>
Net Cash Provided by Financing Activities	<u>\$ 3,973,399</u>

Net Increase in Cash	\$ 2,094,174
Cash, Beginning of Year	\$ 300,138
Cash, End of Year	<u><u>\$ 2,394,312</u></u>

These financial statements have not been subject to an audit, review, or compilation engagement, and no assurance is provided on them. Substantially all of the disclosures 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
MANAGEMENT DISCUSSION AND ANALYSIS
MAY 31, 2020**

1. MFP REVENUES

The total 2% administrative fee, charged by the OPSB for its supervisory role in being the school's granting authority, retained by OPSB for fiscal year 2019-20, is \$196,607 through May 31, 2020 and is recorded within Purchased Services on the Statement of Activities and Change in Fund Balance.

2. PUBLIC GRANTS & PROGRAM FUNDING	Month	Year to Date	Annual Budget	% ACHIEVED
NCLB - Title I		257,578	\$ 325,258	
Title II - Improving Teacher Quality		-		
IDEA-B		141,811		
LA 4		172,666		
EEF	34,601	72,101		
CODOFIL Stipends		63,250		
2018-19 F.A.T. Salary	33,250	332,500		
New School for Nola		-		
Federal Lunch Program		188,974		
Literacy Grant		-		
Total Public Grants and Program Funding	<u>\$ 67,851</u>	<u>\$ 1,228,879</u>	<u>\$ 2,057,780</u>	<u>60%</u>

3. PRIVATE GRANTS AND DONATIONS	Month	Year to Date	Annual Budget	% ACHIEVED
Chinese - Donation In-Kind (Salaries)	12,900	129,000		
LASIP Program		-		
Give Nola		8,482		
Sunship		-		
DISASTER GRANT		10,000		
Keller Family		-		
Rosamary Foundation		-		
Annual Giving and Other Donations	414	44,294		
Cool Zoo		15,751		
City Park		302		
Kellogg Grant		-		
PTO Mini Grant		-		
Walton Grant		-		
Pro Bono Publico Foundation Grant		15,000		
CSGF		40,000		
FAME BOARD		-		
GNOF		-		
Fais Do-Do		687		
Misc Donations	47	13,388		
Total Private Grants and Donations	<u>\$ 13,362</u>	<u>\$ 276,903</u>	<u>\$ 569,000</u>	<u>49%</u>

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**FRENCH AND MONTESSORI EDUCATION INCORPORATED
D/B/A AUDUBON CHARTER SCHOOL
MANAGEMENT DISCUSSION AND ANALYSIS
MAY 31, 2020**

4. OTHER INCOME	Month	Year to Date	Annual Budget	% ACHIEVED
Charter Care and Arts Reach	\$ 175	\$ 249,554		
Other Student Activity		68,767		
Consumable Fees		75,594		
EarthKeepers		-		
Summer Camp		15,424		
Food Service Revenues		15,957		
Other Miscellaneous	2,076	27,838		
Total Other Income	<u>\$ 2,251</u>	<u>\$ 453,134</u>	<u>\$ 509,368</u>	<u>89%</u>
5. INVESTMENTS	Balance at			
	5/31/2020			
CDARS Account:				
Principal				
Accrued Interest				
Subtotal	<u>-</u>			
Merrill Lynch Account:				
Cash/Money account	17,576			
Government and Agency Securities	503,634			
Corporate Bonds	229,341			
Blackrock Mutual Fund	244,941			
Accrued Interest	3,899			
Subtotal	<u>999,391</u>			
Total Investments	<u>\$ 999,391</u>			

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

Coversheet

2020-2021 Operating Budget

Section:	II. Finance Committee
Item:	B. 2020-2021 Operating Budget
Purpose:	Vote
Submitted by:	
Related Material:	20-21_BUDGET_Preliminary.pdf 20-21 BUDGET PRESENTATION.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				\$ -
TOTAL REVENUE	\$ 9,791,835	\$ 2,756,429	\$ -	\$ 12,548,264
EXPENSES				
SALARI ES	\$ 5,338,372	\$ 1,633,930	\$ 574,283	\$ 7,546,585
BENEFI TS	\$ 1,498,636	\$ 231,120	\$ 172,285	\$ 1,902,041
DI SPOSAL	\$ 15,000	\$ 6,000	\$ -	\$ 21,000
DUES				
Discretionary Dues	\$ 13,260	\$ 3,740	\$ 2,500	\$ 19,500
GNOCOS	\$ 19,500	\$ 5,500		\$ 25,000
	\$ 32,760	\$ 9,240	\$ 2,500	\$ 44,500
FOOD SERVI CE	\$ 275,000	\$ 100,000		\$ 375,000
I NSURANCE	\$ 225,000	\$ 67,500		\$ 292,500
MATERI ALS				
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
	\$ 100,250	\$ 68,560	\$ 91,846	\$ 260,656
PURCHASED SERVI CES				
OPSB ADMINISTRATIVE 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
	\$ 673,513	\$ 265,448	\$ 153,712	\$ 1,092,672

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

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
Total revenues and support	9,791,835	2,756,429	-	12,548,264	12,849,554	-2%	14,904,280
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
Total expenses	8,732,064	2,971,967	1,004,626	12,708,657	12,849,554	-1%	13,035,881
Surplus (Defecit)	\$ 1,059,771	\$ (215,538)	\$ (1,004,626)	\$ (160,393)	\$ 0		\$ 1,868,399



BUDGET DOCUMENT

2020 – 2021 Annual Budget

Abstract

Included with the 2020-21 annual budget is a highlight of the results of operations along with the programmatic goals for the Audubon Schools for the 2020-2021 school year

Kendal R. Turner, CPA and Justin Anderson, CPA

Kendal_Turner@audubonschools.com and janderson@asnola.org

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WHO WE ARE?

Organization

French and Montessori Education, Inc. (FAME) was created as a non-profit corporation under the laws of the State of Louisiana on October 28, 2005. FAME operates two Type 3 charter schools with the Orleans Parish School Board (OPSB). The formation of FAME was in response to the devastation left by Hurricane Katrina.

On January 12, 2006, the OPSB approved the charter of Audubon Charter School, d/b/a Audubon Uptown. The initial charter was granted for five years and was subsequently renewed for another five-year term during 2011. On May 20, 2017, FAME entered into a ten (10) year charter school operating agreement for Audubon Charter School with the OPSB commencing July 1, 2017 and expiring June 30, 2027. Under this new agreement, Audubon Charter School will operate as its own Local Education Authority (LEA). The School serves eligible students in pre-kindergarten through eighth grade. The Organization entered into two leases with the OPSB to operate Audubon Charter School, both of which expire on June 30, 2021.

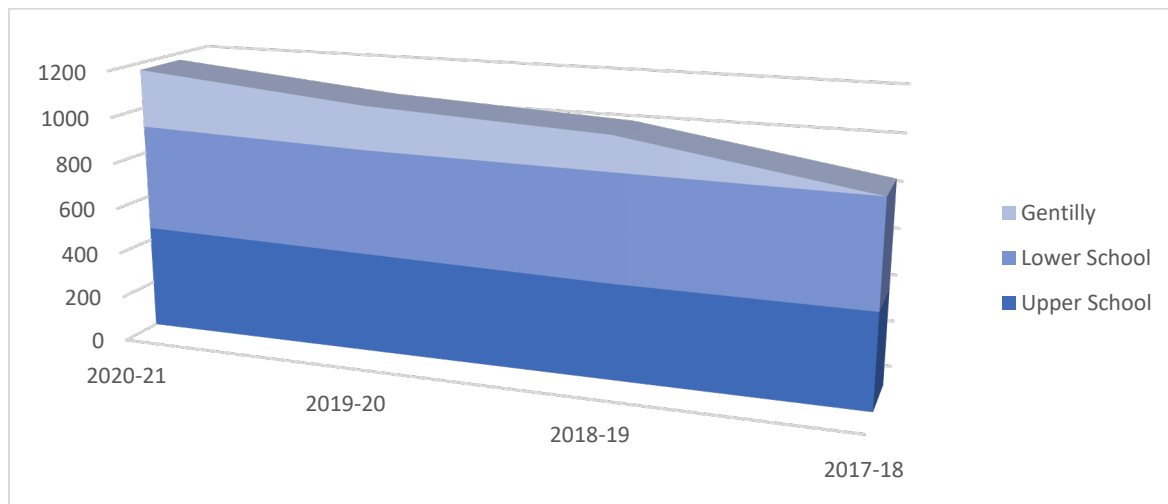
On April 21, 2018, the OPSB approved the charter of Audubon Schools Gentilly, d/b/a Audubon Gentilly. The initial charter was granted for five years expiring June 30, 2023. Under this charter agreement, Audubon Schools Gentilly will operate as its own LEA. The School serves eligible students in pre-kindergarten through eighth grade.

Student Population

	2020-21	2019-20	2018-19	2017-18
Enrollment	1169	1075	1024	861
Upper School	454	433	412	408
Lower School	463	453	461	453
Gentilly	252	189	151	N/A
Program Enrollment				
French School	433		408	406
Montessori School	483		465	455
Montessori in a bilingual environment	252	189	151	N/A
Student with Exceptionalities	TBD	436	347	277
Student with Disabilities	TBD	391	101	81
Gifted and Talented	TBD	45	246	196
Students Eligible for Free/Reduced Lunch		418	409	306

Increasing overall student population

Enrollment trends



OVERALL FINANCIAL HEALTH

The overall financial health of FAME is solid. The organization has net assets in excess of \$2.59M as of the last closed period of May 2020. The organization has maintained steady enrollment at Audubon Uptown and continued growth the Audubon Gentilly location as it adds grade levels each year. The organization's assets are largely comprised of building improvements at the Audubon Gentilly location as well as a large cash deposits related to \$2M from the Paycheck Protection Program, a forgivable loan program.

Auditors have consistently render unmodified opinions annually, and reports free of any findings over financial statements or compliance.

The lower school and upper school act as one LEA (Audubon Uptown), where both French education or Montessori education has been selected by the students in Pre-kindergarten through eighth grade. The net assets of this school are strong and continue to grown annually. The Audubon Gentilly acts as its own LEA, offering Montessori education in a bilingual environment, which enrichment in the arts and multiple language environments. The Audubon Gentilly school continues to grow in enrollment and grade levels, adding to its improving financial health and increasing independent stability.

	2020-21*	2019-20**	2018-19	2017-18
	*budgeted	**projected year end		
Revenue	\$ 12,548,264	\$ 14,904,280	\$ 11,564,754	\$ 11,738,652
Expenses	12,708,657	13,356,573	13,490,400	10,913,892
Change in Net Assets	\$ (160,393)	\$ 1,547,707	\$ (1,925,646)	\$ 824,760

NOLA Public Schools rating of "In Good Standing"

PRIOR YEAR DEFICIT SPENDING

During the 2018-2019 school year, FAME experienced significant deficit spending of nearly \$2M.

FAME created a central office staff, which included a Pupil Appraisal team and directors of the French program, Montessori program as well as the learning center.

This was largely associated with the opening of the Audubon Gentilly's first year of operation and the creation of Audubon central office to create capacity. The 2018-2019 school year afforded the organization large grants due to significant funding raising efforts. The grants were awarded for the funding of Audubon Gentilly.

Reduction of salary cost in excess of \$1M

WHERE WE HAVE BEEN?

LEARNING CENTER

The Learning Center was created by Audubon to provide certification opportunities internally for staff in Montessori education. The center would afford Audubon schools the opportunity to reduce expenses of travel by providing the training locally in addition to provide the opportunity for revenue generation by providing a tuition and fee-based training to external members of the education community.

During the 2019-2020 school year, the Learning Center became accredited at two levels: Early Childhood and Lower Elementary. The Learning Center has been able to provide development and guided instruction to its second cohort. The Learning Center seeks to continue to provide those services to external educational professionals who seek certification in Montessori instruction.

Learning Center was accredited in early childhood and lower elementary education.

COVID-19 RESPONSE

On March 13, Audubon schools ceased on-campus instruction, shifting to a full distance learning model. Audubon teachers were able to provide both live and asynchronous instruction for students. Audubon schools, with the assistance from the SBA Paycheck Protection Program and other Cares Act funding was able to maintain all staff members throughout the campus closure. During the closure, several mitigating measures were implemented to provide students instruction, ensure safe work environments for staff, secure and clean facilities and provide support to families and the community at large.

- *Staff served greater than 3,000 meals to our students and community.*
- *Teachers maintained office hours, virtual student engagement activities, live and asynchronous instruction, and summer enrichment lessons were provided.*
- *Audubon expanded its online platforms to include Zoom, Google Classroom and Microsoft Teams.*
- *All families requesting laptops and hotspots were provided no cost use of technology to facilitate learning.*
- *Audubon continues to provide over 100 laptops on loan to promote continued education and reduced learning loss over the summer.*
- *Each school purchased computers to bring on-campus computer use to a 1:1 ratio for all grade levels, preparing for a safe return to campus.*
- *Custodial staff in addition to the routine year-end closing procedures and school start routines made several deep cleanings of the campus and sanitized all areas.*
- *Teachers and staff continue to conduct virtual planning meetings to prepare for on-campus instruction, distance learning and hybrid models.*
- *Staff is duplicating Montessori manipulatives for distance learning for each student to take home.*
- *Administrators continue recruitment efforts cover any teaching shortages due French teachers that may be VISA and border closures.*
- *Teachers, staff and administrators are making every effort to maintain high levels of student and family engagement throughout closure.*

WHERE ARE WE?

SCHOOL REOPENING

The teachers, staff and administrators of Audubon school continue to plan throughout the uncertainty caused by this pandemic. While the organization has gained helpful incite from the Center from Disease Control, State of Louisiana, the Louisiana Department of Education and the Orleans Parish School Board as guidelines for reopening our schools, we operate with caution and continue to plan for the uncertain. We keep at the forefront of every decision, the health and safety of students, staff and families, reducing any academic gaps that may have been caused as a result of the abrupt closure of campuses, and all social and emotional needs of students and staff.

The health and safety, academic achievement and social and emotional health of the students and staff are the paramount concern and guiding principles of all decisions.

We are preparing on adding the following additional measures to our programming and facilities:

- *Health and Safety*
 - Changes in bus transportation by replacing vans with buses and adding every other row seating
 - Purchasing thermometers for routine health screenings
 - Acquiring sanitizer stations and personal protective equipment (PPE) for students and staff
 - Adding disposable Montessori materials to classrooms
 - Providing water bottles for students and serving lunches in class
 - Increasing the cleaning of bathroom after each static group uses the facilities
- *Academic gaps*
 - Reducing class sizes to a static group of 25 or less
 - Limiting the enrollment of students in before and after school care
 - Providing virtual and distance learning options for students and parents
- *Supporting social and emotional health*
 - Availing social workers and counselors to students to increase group and one-on-one mental health sessions
 - Increasing in class counseling support to respond pandemic related issues
 - Providing trauma-informed instruction
 - Adopting Second Steps curriculum school-wide
 - Adding SEL screening for anxiety and identifying trauma

WHERE ARE WE HEADED?

LOOKING FORWARD

As we look forward to other initiatives, the schools will continue to monitor the funding affects caused by the Covid-19 pandemic. In addition, administration will review the affects of the removal of the hold harmless funding on Audubon Uptown. Staff will continue to solicit private funding to cover any anticipated budget shortfalls, while mindful of the difficulties in fundraising at the time.

Facility concerns will continue to be monitored. Funding plans will be developed to cover the renovations for the Banneker campus, which are estimated to cost at \$8M. These renovations are expected to take 18-month after start and will house the students from the current Milan campus. Staff will also continue to proceed as practical with the Audubon Gentilly campus. Administrators will continue to pursue all funding possible to minimize the financial impact to the overall financial health of Audubon schools.

Programmatic adjustments will be made to increase services to our students needing accommodations in special education and increase capacity of our response to intervention (RTI).

KEY PERFORMANCE INDICATORS

BUDGET HIGHLIGHTS

- *MFP Revenue*
 - *Uptown average per pupil funding \$9262*
 - *Gentilly average per pupil funding \$9923*
 - *Uptown MFP enrollment 823 students*
 - *Gentilly MFP enrollment 265 students*
- *Other Income*
 - *Projecting 50% reduction in revenue for related before and after school programs.*
- *Benefits*
 - *Uptown TRSL employer contribution 25.8%*
 - *Gentilly 403b employer match 3%*
 - *Over \$200k cost reduction in medical benefits due to carrier change.*
- *Purchased Services*
 - *\$198k for OPSB administrative fees.*
 - *Projecting 50% for activities related to after school programs.*
- *Transportation*
 - *Gentilly costs budgeted at 4 buses compared to 3 prior year.*
 - *Uptown costs 50% increase in transportation participation.*

COMPARATIVE BUDGET

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
Total revenues and support	9,791,835	2,756,429	-	12,548,264	12,849,554	-2%	14,904,280
EXPENSES							
Salaries	5,338,372	1,633,930	574,283	7,546,585	7,367,929	2%	8,215,535
Benefits	1,498,636	231,120	172,285	1,902,041	2,205,603	-14%	2,055,238
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
Total expenses	8,732,064	2,971,967	1,004,626	12,708,657	12,849,554	-1%	13,356,573
Surplus (Defecit)	\$ 1,059,771	\$ (215,538)	\$ (1,004,626)	\$ (160,393)	\$ 0		\$ 1,547,707

2020-2021 BUDGET BY LEA

REVENUE	UPTOWN	GENTILLY	CENTRAL OFFICE	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
IDEA 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 & Misc Revenue	\$ 212,500	\$ 25,000		\$ 237,500
				\$ -
TOTAL REVENUE	\$ 9,791,835	\$ 2,756,429		\$ 12,548,264
EXPENSES				
SALARIES	\$ 5,338,372	\$ 1,633,930	\$ 574,283	\$ 7,546,585
BENEFITS	\$ 1,498,636	\$ 231,120	\$ 172,285	\$ 1,902,041
DISPOSAL	\$ 15,000	\$ 6,000	\$ -	\$ 21,000
DUES				
Discretionary Dues	\$ 13,260	\$ 3,740	\$ 2,500	\$ 19,500
GNOCCS	\$ 19,500	\$ 5,500		\$ 25,000
	\$ 32,760	\$ 9,240	\$ 2,500	\$ 44,500
FOOD SERVICE	\$ 275,000	\$ 100,000		\$ 375,000

INSURANCE	\$ 225,000	\$ 67,500		\$ 292,500
MATERIALS				
DISCRETIONARY	\$ 50,000	\$ 15,000	\$ 3,050	\$ 68,050
INSTRUCTIONAL SUPPLIES	\$ 20,250	\$ 39,060		\$ 59,310
CENTRAL OFFICE SUPPLIES			\$ 17,307	\$ 17,307
F.A.M.E.			\$ 13,530	
TECH LICENSES AND SUPPLIES			\$ 57,959	\$ 57,959
MISC STUDENT ACTIVITY SUPPLIES	\$ 5,000	\$ 2,000		
INSTRUCTIONAL TECHNOLOGY				\$ -
CUSTODIAL SUPPLIES & TECH	\$ 25,000	\$ 12,500		\$ 37,500
	\$ 100,250	\$ 68,560	\$ 91,846	\$ 260,656
PURCHASED SERVICES				
OPSB ADMINISTRATIVE 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
	\$ 673,513	\$ 265,448	\$ 153,712	\$ 1,092,672
RENTALS				
COPIER RENTAL	\$ 20,000			\$ 20,000
BUILDING RENTALS	\$ 1,500	\$ 1,000	\$ 2,500	\$ 5,000
	\$ 21,500	\$ 1,000	\$ 2,500	\$ 25,000
REPAIRS AND MAINTENANCE	\$ 176,033	\$ 97,169		\$ 273,202

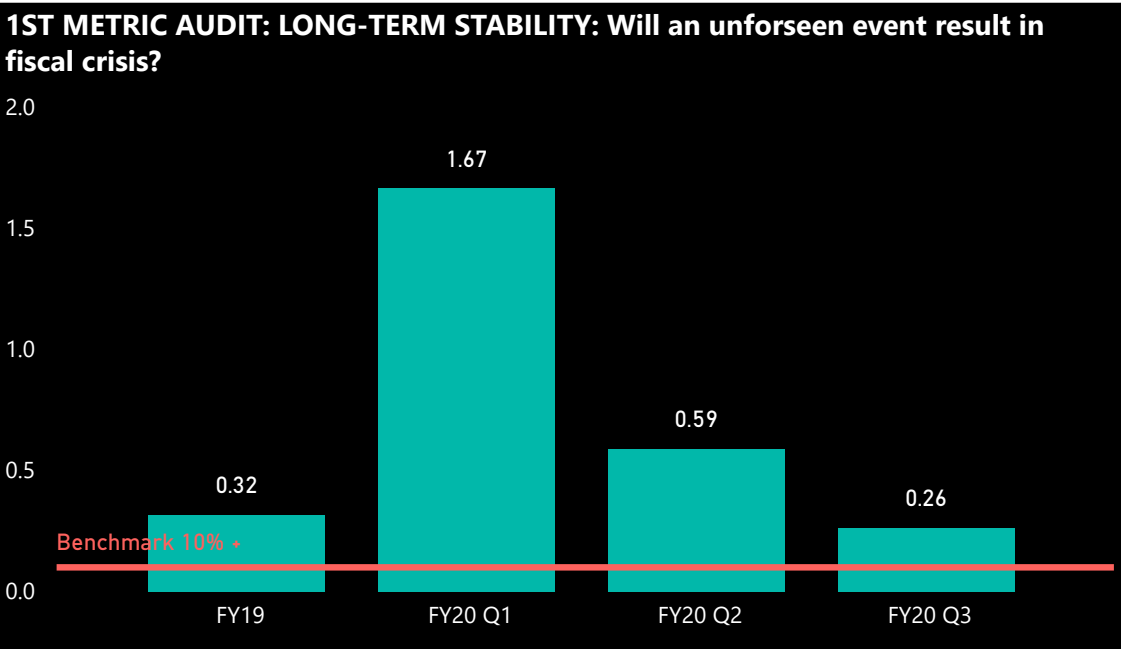
TRAVEL	\$ 50,000	\$ 2,500	\$ 5,000	\$ 57,500
UTILITIES				
ELECTRICITY & GAS	\$ 127,000	\$ 35,000		\$ 162,000
COMMUNICATIONS	\$ 48,500	\$ 9,000		\$ 57,500
	\$ 175,500	\$ 44,000		\$ 219,500
DEPRECIATION	\$ 75,000	\$ 105,000		\$ 180,000
OTHER EXPENSES				
MISC STUDENT ACTIVITY PASS THROUGH	\$ 12,500	\$ 1,000	\$ 2,500	\$ 16,000
DEBT SERVICE	\$ 3,000	\$ 135,000	\$ -	\$ 138,000
TRANSPORTATION				
BUS SERVICE	\$ 35,000	\$ 200,000		\$ 235,000
STUDENT FIELD TRIPS	\$ 25,000	\$ 4,500		\$ 29,500
	\$ 60,000	\$ 204,500		\$ 264,500
TOTAL EXPENSES	\$ 8,732,064	\$ 2,971,967	\$ 1,004,626	\$ 12,708,657
SURPLUS (DEFICIT)	\$ 1,059,771	\$ (215,538)	\$ (1,004,626)	\$ (160,393)



In Good Standing

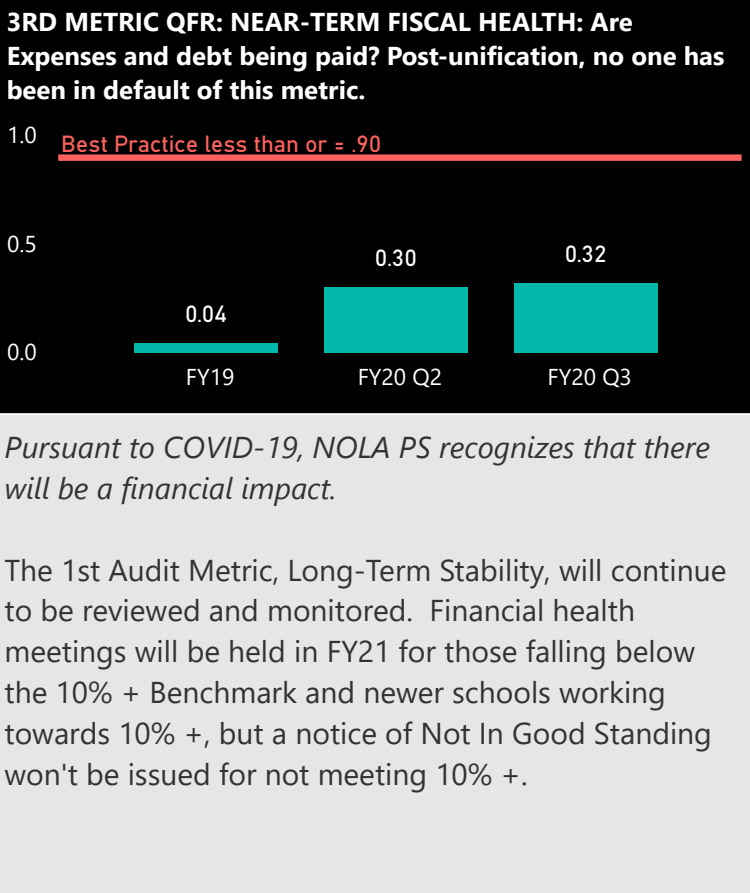
Fiscal Oversight Dashboard
Audubon Schools
End of Year (EOY) Report
Report Date: 06/23/2020
Page 1 of 1

CSAF METRICS

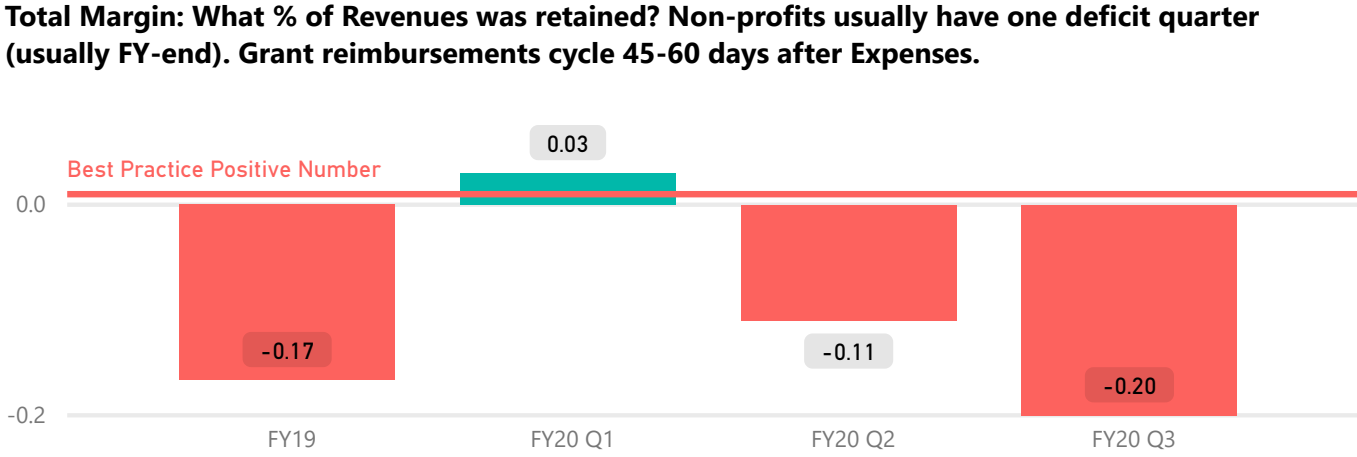
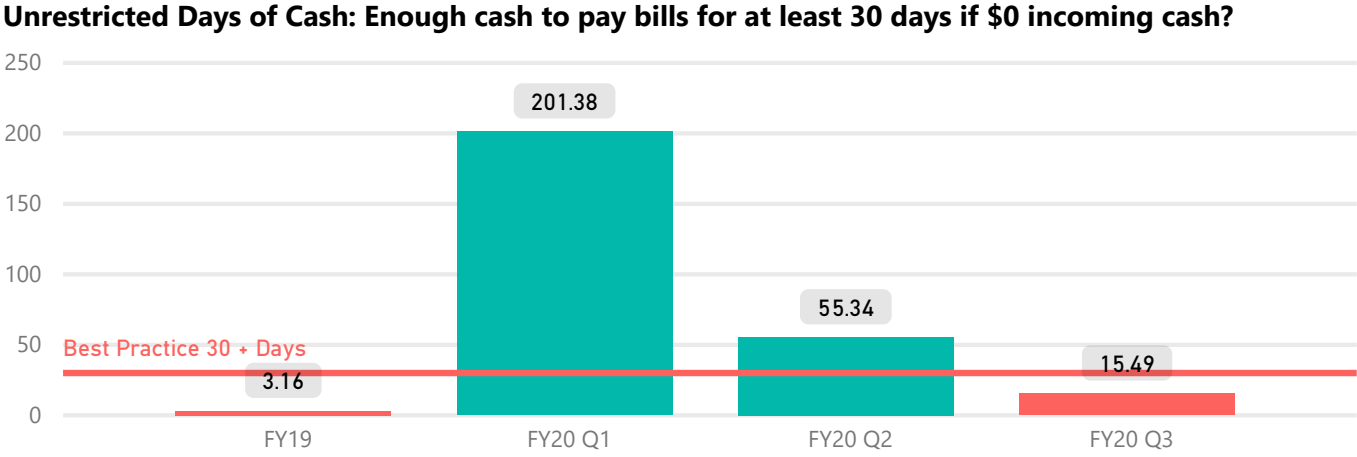
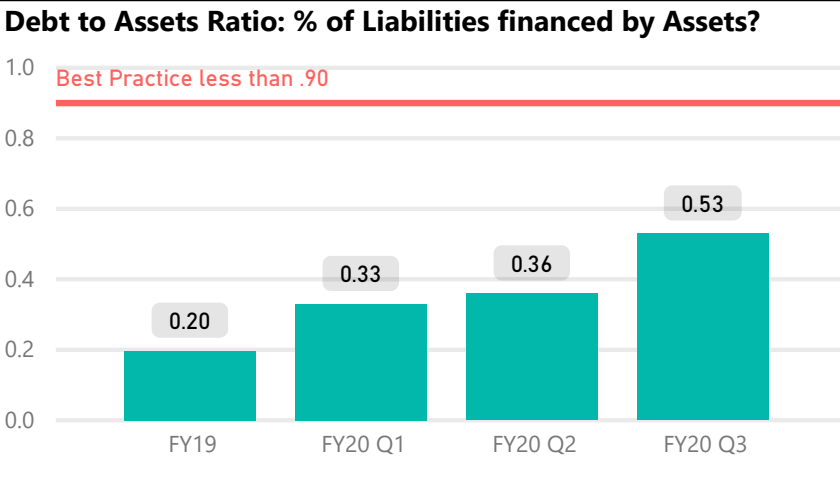
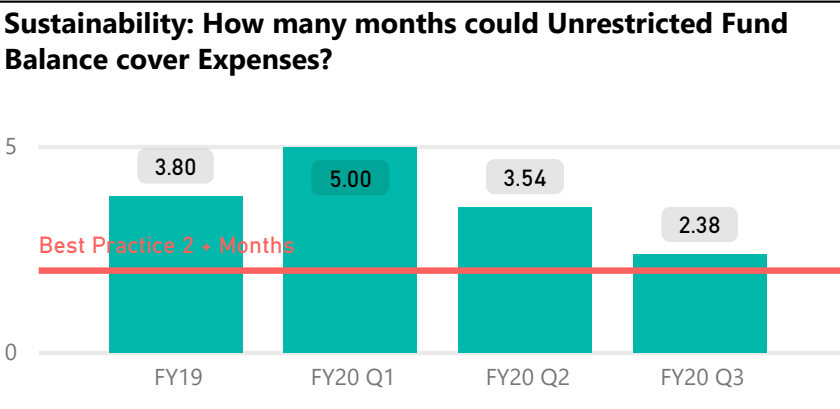


2ND METRIC AUDIT: FIDUCIARY MANAGEMENT

FY19 Unqualified Audit with no significant, material, internal control weakness(es) and/or deficiency(ies).



CSAF ADDITIONAL METRICS When First Three (3) Metrics Not Met



Coversheet

Recommendation to Approve a Contract for Bus Transportation Services

Section: II. Finance Committee
Item: C. Recommendation to Approve a Contract for Bus Transportation Services
Purpose: Vote
Submitted by:
Related Material:
Committee Recommendation to Board of Directors for Transportation Contract.pdf
Audubon_Charter_Schools_RFP.pdf
B_L_Transportation_Supporting_Documents.pdf



Committee Recommendation to Board of Directors

After careful review of the proposed contract with B&L Transportation, Inc. that was presented to the Finance Committee on Thursday, July 2, 2020, it is the recommendation of the Finance Committee that the Board of Directors vote to approve the proposed contract with the terms as presented.

It is our hope that the Board of Directors supports this recommendation as each committee member is fully dedicated to the success of Audubon Schools and its sustainability and have duly reviewed all documents associated with realizing this recommendation.

List All Committee Members Present:

1. Harold LeBlanc
2. Jorge Perez
3. Christine Coleman
4. Calvin S. Tregre
5. Javier Jalice, ex-officio member

List Administrative Team Present:

1. Justin Anderson
2. Kendal Turner
3. Latoye Brown

Duly Sworn by My Signature

Calvin S. Tregre

Calvin S. Tregre
Chairman, Finance Committee

B&L Transportation, Inc.

RFP Prepared For:



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

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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

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 10th 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

Routefinder shows the number of students on each route. B&L Transportation adheres to the State of Louisiana's rules that are outlined in Bulletin 1191.

Map of the City of New Orleans showing the proposed route for the New Orleans to Lake Charles Expressway. The map displays the city's grid system, major roads, and the proposed expressway route highlighted in green. Key locations labeled include the Mississippi River, Lake Borgne, and various street intersections such as Maple St & Live Oak St, Apple St & Comblong St, and others.

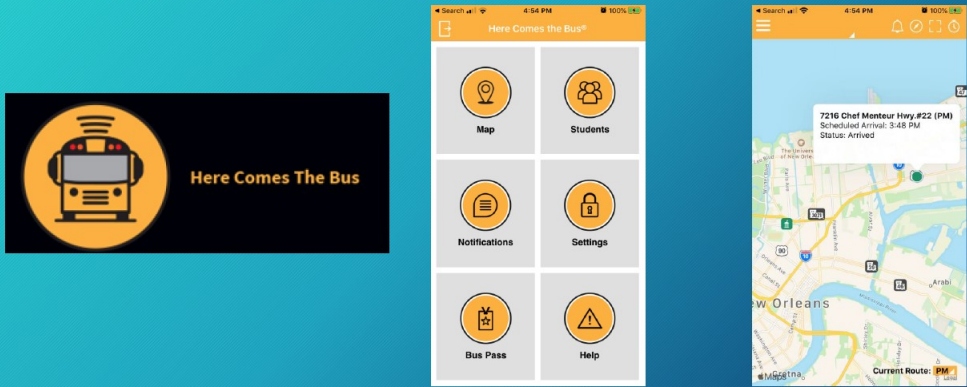
B&L Transportation

Here Comes the Bus App

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

B&L Transportation - Tracking for Parents

- Here Comes the Bus - Parent App



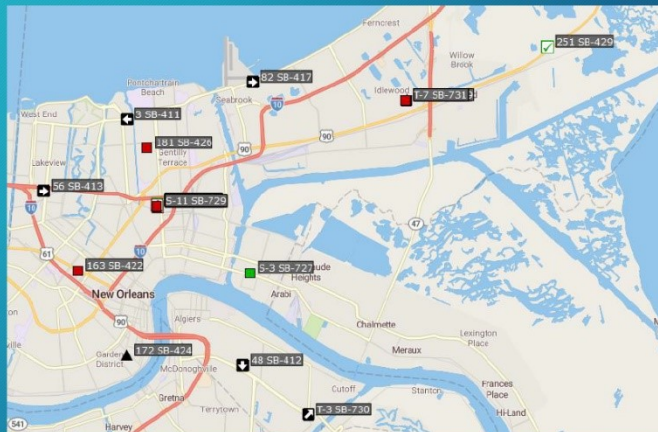
The image displays the 'Here Comes the Bus' app interface. On the left is the app's logo, which consists of a yellow bus icon inside a circle, with the text 'Here Comes The Bus' to its right. To the right of the logo is a grid of six icons: a location pin for 'Map', a group of people for 'Students', a speech bubble for 'Notifications', a padlock for 'Settings', a ticket for 'Bus Pass', and a warning triangle for 'Help'. Further to the right is a screenshot of the app's map view, showing a map of New Orleans with a yellow line indicating the bus route. A callout box on the map provides details for bus 7216 Chef Monteur Hwy #22 (PM), including a scheduled arrival time of 3:48 PM and a status of 'Arrived'.

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)

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

Officer(s)

Additional Officers: No

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

Officer:	LESLIE L. SCHWERTZ
Title:	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. - July Board Meeting - Agenda - Saturday July 11, 2020 at 10:00 AM

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 & L TRANSPORTATION	AMOUNT:	\$1,200.00
	dba B & L TRANSPORTATION	INTEREST:	\$29.00
ACCOUNT NO:	105041841	PENALTY:	\$115.00
BUSINESS LOCATION	3701 ELYSIAN FIELDS AVE	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 & L TRANSPORTATION	CERTIFICATE NUMBER:	
	B & L TRANSPORTATION		
ACCOUNT NUMBER:	105041841	EFFECTIVE DATE:	7/8/2019
BUSINESS LOCATION:	3701 ELYSIAN FIELDS AVE		
	NEW ORLEANS, LA 70122		

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 20

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	

REMIT THIS AMOUNT

AMOUNT

900 00

CASH

☒

OTHER

Check #991

January 22

20

Date

Owner Name

John Livaccari

Trade Name

Mail Address

3701 ELUSANTHUS Ave

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.

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



Revenue Deputy

204129
 OFFICIAL RECEIPT

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:

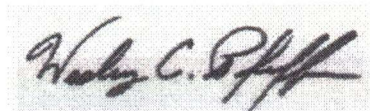
- Animal Drawn Carriage, Courtesy, & Pedicab: March 31
- School Bus: April 30
- Limousine, General Charter, Sightseeing, Airport Shuttle, Non-Emergency Medical Transportation, Charter Party Carrier: June 30
- Taxicab & Accessible Taxicab: December 31

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&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).

PRODUCER Eustis Insurance, Inc. 110 Veterans Memorial Boulevard Suite 200 Metairie, LA 70005	CONTACT NAME: PHONE (A/C, No, Ext): (504) 586-0440 E-MAIL: info@eustis.com ADDRESS: FAX (A/C, No): (504) 565-5219														
INSURED B&L Transportation, Inc. 428 West 23rd Street Larose, LA 70373	<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <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> </tbody> </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 :	
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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 SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:		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 <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		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.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. 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	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
---	---

ACORD 25 (2016/03)

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LOC #: 1



ADDITIONAL REMARKS SCHEDULE

Page 1 of 1

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

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 roof)			
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. PARENTHOOD 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 (8" X 16"-Type A buses; 8" 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 (8"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**

Degree 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&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&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 1st 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 Schwertz

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

Recommendation to Approve Proposed Pay Period Changes

Section: II. Finance Committee
Item: D. Recommendation to Approve Proposed Pay Period Changes
Purpose: Vote
Submitted by:
Related Material:
Committee Recommendation to Board of Directors for Employee Pay Periods Changes.pdf



Committee Recommendation to Board of Directors

After careful review of the proposed revisions to the **Employee Pay Periods** that was presented to the Finance Committee on Thursday, July 2, 2020, it is the recommendation of the Finance Committee that the Board of Directors vote to approve the proposed revisions as presented.

It is our hope that the Board of Directors supports this recommendation as each committee member is fully dedicated to the success of Audubon Schools and its sustainability and have duly reviewed all documents associated with realizing this recommendation.

List All Committee Members Present:

1. Harold LeBlanc
2. Jorge Perez
3. Christine Coleman
4. Calvin S. Tregre
5. Javier Jalice, ex-officio member

List Administrative Team Present:

1. Justin Anderson
2. Kendal Turner
3. Latoye Brown

Duly Sworn by My Signature

Calvin S. Tregre

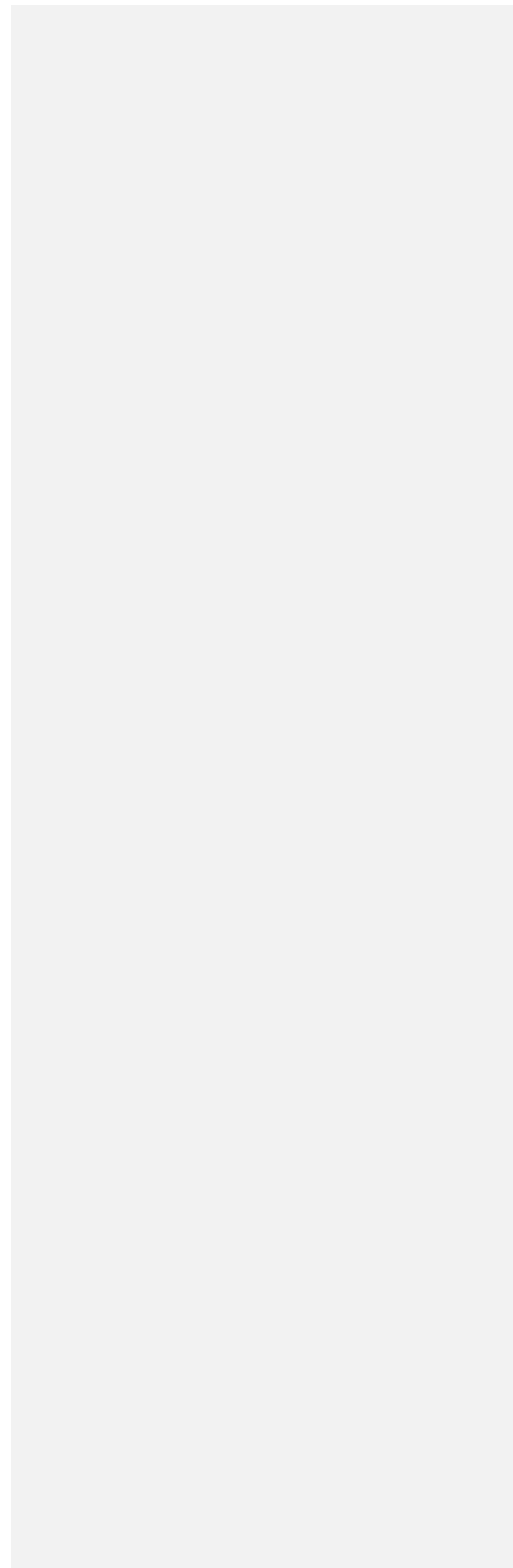
Calvin S. Tregre
Chairman, Finance Committee

Coversheet

Recommendation to Approve Proposed Revisions to Financial Policies and Procedures

Section:	II. Finance Committee
Item: and Procedures	E. Recommendation to Approve Proposed Revisions to Financial Policies
Purpose:	Vote
Submitted by:	
Related Material:	Sect 700-702 Procurement (as revised 20200629) with track changes.pdf Sect 1602 Purchasing (as revised 20200629).pdf Sect 700-702 Procurement (as revised 20200629).pdf Sect 1602 Purchasing (as revised 20200629) with track changes.pdf

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.

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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

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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.)

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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

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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

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- 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.

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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.

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

Limited Competition

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- 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

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- 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;

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- 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.~~

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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.

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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

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.
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- 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;
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- 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.

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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.
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 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;
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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~~

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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.

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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
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 - (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).

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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.

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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.

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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.

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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

Academic Report

Section:	IV. CEO's Report
Item:	A. Academic Report
Purpose:	FYI
Submitted by:	
Related Material:	school-reopening-faq.pdf NOLA PS Roadmap to Reopening_070120_FINAL.pdf strong-start-2020-louisiana's-plan.pdf



School Operations Guidance 2020-2021 Frequently Asked Questions

This page is being continuously updated. If you've opened this document more than once, please clear your history/cache and refresh the page to view the most up-to-date version.

All new/updated information is highlighted throughout this FAQ.

In this FAQ

[General](#)

[Maximum Group Size](#)

[Physical Standards](#)

[Athletics](#)

[Symptom Monitoring](#)

[Environmental Cleaning and Personal Hygiene](#)

[Transportation](#)

[Additional Operational Considerations](#)

[Teaching and Learning: School Reopening Best Practices](#)

[General](#)

Q: What guidance for school operations during the 2020-2021 school year is available?

A: Working with the Louisiana Department of Health, LDOE has [provided guidance and best practices](#) for reopening schools in a safe manner for 2020-2021. This guidance consists of a Public Health guidance, best practices, planning template and to aid schools in developing reopening plans.

Q: Who should school systems contact for further information surrounding the released [School Reopening Guidance](#)?

A: School systems should email LDOECOV19support@la.gov for questions surrounding the released [School Reopening Guidance](#)

Q: Will private and parochial schools be required to follow the state and/or parish guidelines? Are the private schools working with the state and/or parish public school system to align the plans for all children in the Fall?

A: The LDH guidelines and LDOE school reopening resources were developed in concert with Louisiana's Department of Health and adopted through the Resilient Louisiana Commission (RLC) structure. They are intended for use by both public and non-public schools. The purpose of the RLC was to bring together the best public sector and private sector expertise to prepare and guide the state through the ongoing aftermath of the COVID-19 pandemic.

Q: Who should school systems contact for answers to specific questions related to their system or school site?

A: School systems should consult with their [Regional Office of Public Health](#) officials for further guidance and answers to specific questions. Outreach to Regional Medical Directors should come from Superintendent level leadership or equivalent.

Updated: July 6, 2020



School Operations Guidance 2020-2021 Frequently Asked Questions

Maximum Group Size

Q: What is the maximum group size allowed in Phases 2 and 3?

A: 25, including adults for Phase 2 and 50, including adults for Phase 3.

Physical Standards

Q: What physical standards are required for schools to reopen?

A: School systems should plan for adequate social distance measures through adaptation of physical standards. LDH and [LDOE reopening guidance](#) provides a series of best practices for maintaining social distance measures.

Q: Are schools allowed to host large group assemblies or gatherings?

A: The best practice recommendation is that assemblies are limited to maximum group sizes and with appropriate physical distancing in place. For younger students unable to maintain physical distance, maintain static groups. All attendees should wear a face covering.

Q: How should students be spaced within the classroom to achieve physical distancing?

A: Student desks should be spaced 6 feet apart to the maximum extent possible. School systems should remove all extra furniture and desks.

Q: Can students be seated at tables with plexiglass dividers?

A: Yes, schools should consult the [School Reopening Guidance](#) for best practices.

Q: Can Pre-K and Kindergarten students bring their own nap mats?

A: Yes. Students should be encouraged to bring their own nap mats.

Q: Can younger students sit on a carpet for large group instruction?

A: Yes. Students may sit on carpets or rugs within a classroom as long as they maintain the physical distancing standards and wear a mask to the maximum extent possible.

Athletics/Extracurricular

Q: What guidance has been provided for athletics and extracurricular activities?

A: The [released guidance from LDH and LDOE](#) allows for non-contact sports and activities to take place during Phases 1 and 2. Contact sports and activities are allowed to resume in Phase 3. For a complete list of athletics guidance, please see the [LHSAA released guidance](#).

Q: Can band and choir occur during Phase 2 and 3?

A: Band and choir should not occur indoors during Phase 2 and 3, but may occur if they take place outside with proper physical distancing measures in place. School systems should consult the [School Reopening Guidance](#) for details regarding physical distancing measures.

Updated: July 6, 2020

Symptom Monitoring

Q: Are temperature checks required for students prior to entry into K-12 facilities?

A: Students should be screened upon arrival to the school facility. Any student registering a temperature of 100.4 degrees or higher should not be admitted to the facility and parents or guardians should be contacted to pick up their student.

Q: What thermometer should school systems use for taking temperatures?

A: School systems should consult p. 15 of the [School Reopening Guidance](#) for guidance on obtaining thermometers. School systems should use a touchless thermometer whenever possible.

Q: Do temperature checks have to be taken prior to entry into the facility or can temperature checks occur in a homeroom classroom?

A: Temperature checks may be taken prior to entry into the facility or within a homeroom classroom by a homeroom teacher. Any student registering a temperature of 100.4 degrees or higher must have their parents or guardians called and sent home until they are fever free.

Q: What steps should a school system or school site take if a positive COVID case is reported by a student or staff?

A: If a school becomes aware of a presumptive positive or positive case of COVID-19, the child should not attend school until determined to be non-infectious by their doctor. Parents may be notified by the Office of Public Health if their child may have been exposed to the case of COVID-19, along with any next steps. If it is determined that a school was the focus of infection for COVID-19, the school superintendent, in consultation with the Office of Public Health, will determine if the school should remain open or close for a period of time. A positive case of COVID-19 does not necessarily warrant classroom or school closure.

Q: What if a student becomes ill at school and a parent/guardian is unable to pick the student up?

A: Isolate the student and use your normal procedures for students who need to be picked up when they get sick at school. Keep them in a safe and secure place to wait until they get a safe way home. [P. 9 of the School Reopening Guidance](#) provides school systems with a sample assurance letter they can use to inform parents and guardians of their illness policy.

Environmental Cleaning and Personal Hygiene

Q: Will students and staff be required to wear masks?

A: Adults and secondary students (3rd grade and older), as able, should wear cloth masks to the maximum extent possible, most importantly at entry and exit, and during transitions within the school building. Individuals with severe breathing difficulties should not wear masks.

Q: Do adult faculty and staff have to wear facial coverings?

A: All faculty and staff should wear facial coverings to the maximum extent possible while on a K12 campus or facility. Teachers and adults that are within 6 feet of students for more than 10-15 minutes should wear a mask within the classroom. If teachers are unable to wear a mask within the classroom setting, teachers should maintain a physical distance of 6 feet from students.

Updated: July 6, 2020



School Operations Guidance 2020-2021 Frequently Asked Questions

Q: Can staff and students wear face shields instead of a cloth mask?

A: The CDC does not recommend a face shield, so a face shield should not be a substitute for a mask.

Q: Can students and staff remove facial coverings for speech therapy and other educational instruction?

A: Yes, students and staff may remove facial coverings if necessary to carry out educational instruction, however they should practice social distancing measures of staying 6 feet apart and wash hands before and after activities.

Q: Should school systems close shared water fountains in K-12 facilities?

A: School systems should close shared water fountains, but may keep bottle filling stations open. School systems should consult p.10 of the [School Reopening Guidance](#) for further information.

Q: Should schools conduct frequent deep cleaning of facilities?

A: Schools should conduct frequent day to day cleaning with a focus on high touch surfaces. School systems should consult the [School Reopening Guidance](#) for further information, including a list of high touch surfaces and appropriate cleaners.

Q: Do schools need to provide warm water for hand washing?

A: No, the use of soap and scrubbing of the hands works to kill the virus. If handwashing stations aren't readily available, schools may use hand sanitizer instead. Hand sanitizers must be at least 60% alcohol content.

Transportation

Q: What is the maximum number of students allowed on transportation buses?

A: Transportation should follow the guidelines outlined in the [Department of Public Health guidance](#) for each phase of reopening.

Q: Are buses required to have hand sanitizer available?

A: As a best practice recommendation, all passengers should engage in hand hygiene upon entering the bus. Hand sanitizer should not exceed 80 percent alcohol concentration and containers should be securely closed, secured against shifting and protected from damage

Q: Are students required to wear facial coverings on a bus?

A: All adults (as able) should wear a facial covering while engaged in the transportation of students. Students (3rd grade and older) should wear facial coverings to the maximum extent possible while being transported. Additionally, K-2 students should be encouraged to wear facial coverings when possible on school transportation.

Q: Is it necessary to keep the windows down on a bus if it is air conditioned?

A: Yes, windows should be down on transportation to maintain maximum air flow. School systems should consult the [School Reopening Guidance](#) for further information regarding mitigation efforts on transportation.

Q: In Phase 2, we are required to keep the bus at 50% capacity or less. How do you space those students out?

A: Most importantly, take the capacity of the bus and multiple by 50% to get the total number of students who can ride the bus at one time. Then, space those students out as much as possible. Let students from the same household sit on the same seat.

Updated: July 6, 2020

Additional Operational Considerations

Q: If school employees or students contract COVID-19, will they have the appropriate amount of time to recover?

A: School systems may consider beginning the school year early and ending the school year later, as health and safety permit, in case future school facility closures disrupt learning time. Louisiana's 63,700 instructional minute requirement can be met through face-to-face instruction or remote learning options.

Q: Will school employees have more sick days this school year, and will they be paid for time missed?

A: School systems develop sick leave policies for employees and may choose to adjust them as needed, but are not required to do so. Schools and employees should continue to work closely with legal counsel to determine rights and responsibilities as this area becomes clearer in the months ahead. Individuals need to make the decision to attend in close consultation with their health care provider and school administrators.

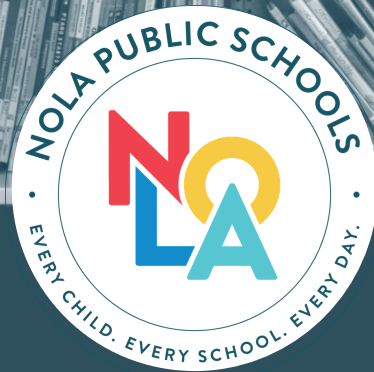
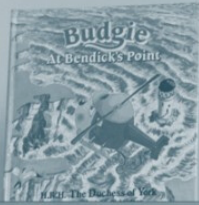
Teaching and Learning: School Reopening Best Practices

Q: What trauma informed and/or mental health training will be provided to teachers and school administrators to support students as a result of the pandemic? How will the school system support the students' emotional well-being?

A: LDOE released the [Guide to Supporting the Well-Being of Students and Staff](#). The guide includes free or low-cost mental health screeners that can be used to identify students in need of mental health supports.

Q: Will instructional minutes be required for schools or students that choose virtual learning for the 2020-2021 school year?

A: The 63,720 instructional minute requirement is still in place for the upcoming school year. School systems can meet this requirement when creating their academic calendar. The requirement can be met through face-to-face instruction or through remote learning models where equitable instructional minutes are met through live teacher led lessons, recorded lessons, worksheet assignments, etc.



ROADMAP TO REOPENING SCHOOLS

July 2020

Dear Members of the NOLA-PS Community,

After closing the book on a school year unlike any other, we are hard at work preparing for our return to school in August. I know you are eager for answers about what your children's routines will look like as our city and country continue to grapple with the many challenges of the COVID-19 pandemic. After months of listening to our community, we are pleased to share the Roadmap to Reopening NOLA Public Schools.

As a father and educator, I know just how important it is that students and teachers safely return to school buildings this fall. Schools are special and dynamic places that are critical to the growth and development of our children. With this in mind, we developed our Roadmap to prioritize the health and safety of students, staff, and families; maximize in-person student learning; provide flexibility to meet the varied needs of families; and provide consistency across our schools. The plan was informed by the [NOLA-Public Schools Reopening Task Force](#), the findings of our [community stakeholder survey](#), close coordination with our school leaders and essential stakeholders; and local, state, and federal health guidelines.

This coming school year, schools will offer a mix of in-person and distance learning, based upon the status of the City of New Orleans' reopening phases and specific health and safety guidelines set by the Louisiana Department of Education. As a system of schools, we have prioritized in-person learning whenever possible, especially for our youngest learners in grades PreK -to 4th grade. Any family who does not feel comfortable returning to school for in-person learning will have the option to learn from home. We learned a lot this past spring about what works – and doesn't work – in a distance setting, and these lessons position our schools to provide strong instructional programming both in-person and at a distance.

In addition to the plan for reopening detailed in the Roadmap, we will provide a series of resources to support schools and families in preparing for the 2020-21 school year. This additional guidance will include a school operations toolkit, distance learning resources and specialized guidance for diverse learners.

Together as a community, we must work to mitigate risks to our students and teachers as we return to school buildings. At school, this means that everyone will be required to wear face coverings, schools will perform temperature checks upon arrival, social distancing measures will be observed as needed, and all schools will participate in enhanced cleaning of classrooms, facilities, and buses. We will also ask everyone to stay at home if they are sick, exhibiting symptoms, or have close contact with a person diagnosed with COVID-19.

We recognize that planning for reopening in this "new normal" will not be easy. We also know that this past spring was not easy either, and I am grateful to our educators and parents for their heroic efforts to support students. School closures were extremely disruptive to families, and our educators were forced to learn a new way of teaching overnight on top of all the other stressors presented by COVID-19. Our educators are essential to helping our community move forward in the face of this crisis, and we are committed to doing all we can at NOLA-PS to support them this coming school year.

The 2020-21 school year will be different. And we must be prepared to adjust and respond as needed at any given moment. We know we are asking more of our educators and families. But with our community's cooperation and shared sacrifice, together we will help our children thrive.

In Service,



Dr. Henderson Lewis, Jr.
Superintendent, NOLA Public Schools

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INTRODUCTION

The NOLA Public Schools Roadmap to Reopening Schools is a set of operational expectations guiding the reopening of schools in response to the challenges COVID-19 continues to present to our school community. In this first step as we support our school community this coming school year, this plan provides a phased approach with clear health and safety standards for schools to adhere to as they reopen school buildings to serve students and support staff. The Roadmap is built upon many weeks of engagement and discussion with educators, parents and other essential stakeholders and the recommendations of health agencies. It is aligned with the reopening guidelines provided by our state and federal leaders and is designed four guiding priorities:

- The health and safety of students, staff, and families;
- Maximized in-person student learning;
- Flexibility in educational options, and
- Citywide consistency.

NOLA Public Schools (NOLA-PS), which is comprised of 78 public schools and 36 charter-management organizations, is committed to serving the children and families of New Orleans in robust, responsive, and safe ways. While no plan can eliminate the risk posed by COVID-19, we know we can work together to ensure our children are provided with essential educational supports this coming school year. And to provide our teachers and families with information on the steps that can be taken at home and at school to support student and staff safety.

This plan identifies specific actions—rooted in data and best practices identified by health experts—that school staff, students, and families will need to undertake daily in order to safely resume in-person instruction and critical services supporting social and emotional health. This coming school year will be unlike any other and it is essential that district staff, school leaders, teachers, students, families, and the community commit to working together to build a culture of safety and care for one another as school buildings reopen.

As we continue to learn more about this pandemic and the best practices needed to mitigate risks associated with COVID-19, NOLA-PS will provide ongoing updates to this plan. We anticipate changes will occur and applaud our educators for building adaptive plans for teaching and learning to respond as the City of New Orleans updates its reopening procedures and decisions. And we will be issuing additional guidance, resources, and training opportunities to help support the implementation of this plan and support the needs of all students prior to and during the school year. It is also important to acknowledge that there will continue to be COVID-19 positive cases in our community, and in schools, and we will have protocols to help our educators determine the appropriate next steps when this happens to keep the school community safe. Together we can do this.



NOTE: *This document is based on current medical knowledge of how COVID-19 is transmitted, primarily through close physical contact, vocal and musical activities during which aerosol particles might be emitted, and touching shared surfaces or objects*

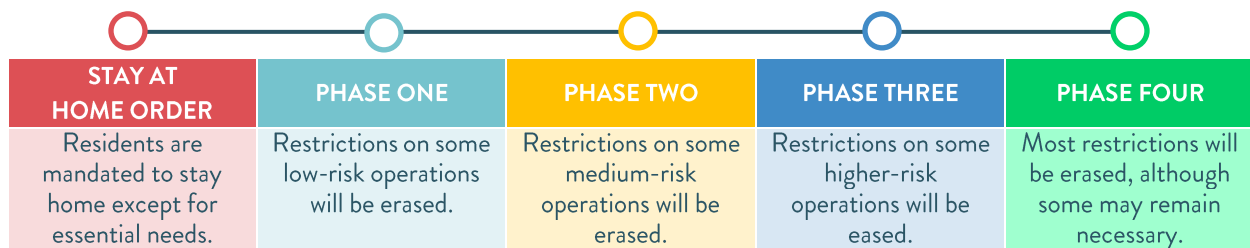
For information regarding COVID 19, please visit the LDH website and CDC website:

<https://www.ldh.la.gov/coronavirus> and <https://www.cdc.gov/coronavirus/2019-ncov/index.htm>, and follow the below standards.

CITY OF NEW ORLEANS PHASED REOPENING

The NOLA-PS Roadmap focuses on the health and physical standards necessary for opening schools during each of the City of New Orleans' reopening phases compliant with practices to reduce the spread of COVID-19. Below is an overview of the City of New Orleans' Phases of Safe Reopening that define when businesses and institutions, inclusive of K-12 schools, can ease stay-at-home and social distancing restrictions.

The movement from one phase to another is dictated by the Mayor of the City of New Orleans and based upon health milestones such as reductions in new cases, increases in hospital capacity, and increases in testing capacity.



Source: City of New Orleans

ROLES OF ENTITIES ENGAGED TO BUILD THE ROADMAP

Louisiana State Department of Health:

- Set the public health requirements for public entities
- Provide the Louisiana Department of Education with guidance on school reopening

Louisiana Department of Education (LDOE):

- Provide [guidelines](#) to school districts, aligned to federal and state public health standards, for how to reopen schools
- Provide best practices and resources for implementing guidelines

City of New Orleans and the New Orleans Health Department:

- Set guidelines for citywide reopening, through its phased framework
- Communicate status of phases of reopening that directly impact school planning and operations
- Manage community testing and citywide public health surveillance

NOLA Public Schools (NOLA-PS):

- Set operational health and safety standards for the reopening of schools by phase, aligned to health and safety guidelines set by the Louisiana Department of Education and other relevant state and local agencies
- Implement systems to oversee and hold schools accountable to the health and safety standards outlined with the Reopening Roadmap
- Identify system-wide needs and seek solutions to support schools as they continue to serve students and support educators citywide. Leverage purchasing capacity to provide critical resources for all charter schools.
- Provide training and resources to schools on the safety standards along with distance learning, diverse learners and mental and behavioral health
- Manage the relationship with the Regional Medical Director and Office of Homeland Security
- Determine if and when schools need to close their facilities, in coordination with school leaderships, the New Orleans Health Department, and the Regional Medical Director
- Provide a medical advisor to schools throughout implementation of the reopening roadmap

Individual Charter Management Organizations:

- Develop school-based operational plans for reopening schools in accordance with the NOLA Public Schools Roadmap and Operational Health and Safety Standards
- Develop school-based instructional delivery plans under each phase of reopening aligned to state and local expectations
- Implement the day-to-day operational procedures and delivery of instruction to students under each phase of reopening
- Communicate the status of phased reopening requirements directly to students, families, and staff in the day to day implementation of operational and instructional plans
- Communicate with students, families, and staff in the event of illness
- Be prepared to pivot from one school model to another as health data impacts how many students may be allowed to attend in-person school on a regular basis

PHASE-BY-PHASE REOPENING ROADMAP

Operational Restrictions:

In Phases 1, 2, and 3, certain capacity restrictions will be in place that effect the operations of schools based on the [School Reopening Guidelines](#) mandated by the Louisiana Department of Education.

	Phase 1	Phase 2	Phase 3
Maximum Group Size <i>(including adults)</i>	10	25	50
Maximum School Bus Capacity <i>(including adults)</i>	25%	50%	75%
Student Grouping Options	Distance learning only. No in-person classes to be held.	Students may be grouped in one of two manners: (1) in static groups of 25 persons (including teachers), without maintaining social distance (recommended for younger students) OR (2) in groups with changing composition, maintaining 6 feet of social distance, cleaning of shared surfaces is required before a new group of students can enter a space (recommended for older students)	Students may be grouped in one of two manners: (1) in static groups of 50 persons (including teachers), without maintaining social distance (recommended for younger students) OR (2) in groups with changing composition, maintaining 6 feet of social distance, cleaning of shared surfaces is required before a new group of students can enter a space (recommended for older students)

PHASE-BY-PHASE REOPENING ROADMAP

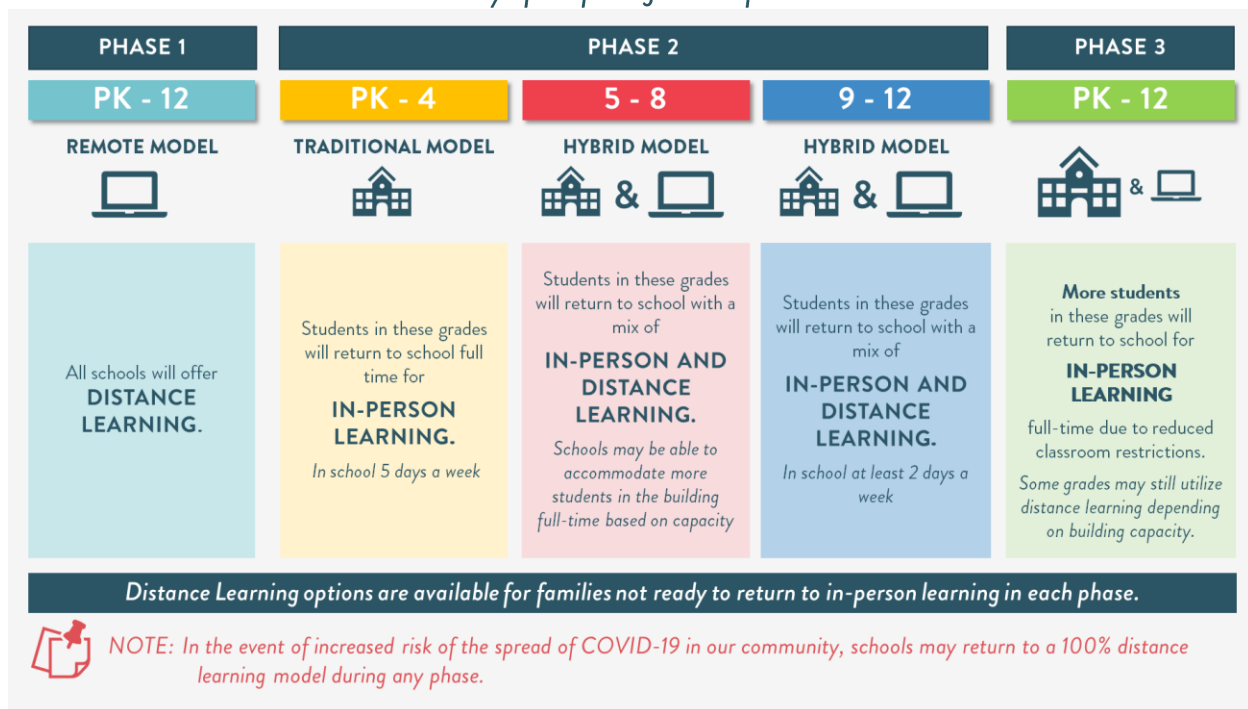
Return to School Model:

Based on the [restrictions and guidelines](#) set by the Louisiana Department of Education and our local New Orleans Health Department, all charter schools authorized by NOLA Public Schools will open their schools to students according to the following approach outlined below.

It is important to note that NOLA Public Schools will consult with the City of New Orleans and the New Orleans Health Department on a regular basis to assess public health data and the City's progress towards critical health milestones to determine if any alterations to the plans defined below are needed at any point this school year. Given the fluid nature of COVID-19 in our community, adjustments to the return to school model may be required.

Additionally, while the approach below establishes a baseline for returning students to school buildings, there will be variation across schools in certain areas. Because each school has varied enrollment, staffing, and other operational factors, such as facility size and transportation requirements, schools will communicate directly with families how they will implement the common approach prior to and at any given point within the school year.

Summary of Reopening Phases for Schools



PHASE-BY-PHASE REOPENING ROADMAP

Detailed Return to School Model:

PHASE 1:

- Schools will not be open for in-person instruction; all schools will offer distance learning.

PHASE 2*:

For Grades PreK - 8:

- Students in grades PreK – 4 will return to school full time, on a regular basis (5 days a week).
- Students in grades 5 – 8 will receive a mix of in-person and distance learning, with rotating in-person sessions scheduled by their individual school.
- Students with the most critical special needs, as determined by the school, may also return to school full time (regardless of grade level).
- If a school can accommodate additional grades in-person, while adhering to operational standards and other terms above, schools may do so.

For Grades 9-12:

- High School students will receive a mix of in-person and distance learning, attending school a minimum of 2 days a week, based upon the students' course schedule.
- Students with the most critical special needs, as determined by the school, may also return to school full time (regardless of grade level).
- If a school can accommodate additional days of in-person instruction, while adhering to operational standards and other terms above, schools may do so.

Across all schools:

- All schools will offer a distance learning option on a quarterly basis for families not ready to return to in-person learning.
- Students may enter the full-time distance learning option at any time and must remain in this learning path for the remainder of any given school quarter.

PHASE 3:

- Schools will follow the Phase 2 model. If a school can accommodate additional grades in person because of increases in transportation and classroom capacity, while adhering to operational standards, schools may do so.
- All schools will offer distance learning on a quarterly basis for families not ready to return to in-person learning.



NOTE: NOLA Public Schools will continue to consult with the City of New Orleans and the New Orleans Health Department to monitor the City's progress towards critical health milestones to determine if any alterations to the Return to School Model in Phase 2 in particular, given recent data trends, and at any other point during the school year.

OPERATIONAL HEALTH AND SAFETY STANDARDS FOR REOPENING SCHOOLS

In consultation with the City of New Orleans Department of Health and the [guidance](#) provided by the Louisiana Department of Education, NOLA Public Schools designed the following phase-by-phase operational standards for critical school functions.

The following Operational Health and Safety Standards set forth school-site expectations to mitigate the risks associated with COVID-19 for in-person school programs and minimize the significant consequences of keeping students out of school. These standards are subject to change as we continue to learn more about this pandemic and the best practices that should be implemented to promote the health and safety of our students, teachers, and staff and school communities during this crisis.



NOTE: Detailed supplemental guidance for complying with these standards will be provided on the NOLA-PS website by July 17, 2020. Guidance may change in accordance with updates from the Centers for Disease Control (CDC) and Louisiana's Office of Public Health.



Conducting Group Gatherings: According to the CDC, a [gathering](#) refers to a planned or spontaneous event, indoors or outdoors, with a small number of people participating or a large number of people in attendance such as a community event or gathering or sporting event.

	Phase 1	Phase 2	Phase 3
Maximum Group Size	10, including adults	25, including adults	50, including adults
Assembly Spaces	No use of gyms or auditoriums.	No use of gyms, auditoriums, etc. for group gatherings. These spaces may be used as teaching stations.	Limit use of indoor shared spaces, such as cafeterias and gymnasiums, to maximum group sizes, ensure physical distance, wearing face coverings, and clean between each group's use. Students and teachers should wash hands before and after events.
Outdoor Standards	Groups are separated but do not require a physical barrier		



Transporting Students: These standards are derived from school operating procedures and the best “reasonable standard” given feasibility constraints.

	Phase 1	Phase 2	Phase 3
Max. Bus Capacity	25%	50%	75%
Cleaning	High-touch surfaces such as; seats and handrails are cleaned after each group's use. The bus is cleaned at least once per day.		
Seating	Ensure space between seats in accordance with six feet of social distancing.	Reduce the number of passengers per seat and, when possible, ensure space between seats. Six feet of social distancing is NOT required.	
	Members of the same household may sit in the same seat or adjacent seats.		
Face Coverings	Adults and students are required to wear face coverings at all times. Please see the Practicing Prevention section for more information		
Personal Hygiene	Provide hand sanitizer when students enter the bus. Health screening checks are NOT required before students onboard.		
Ventilation	To increase airflow, windows should be open to the maximum extent possible.		
Students with Special Needs	For medically fragile children that require specialized transportation, consider reserving specific seats. These seats would not be used for other students during the day, with special precautions for disinfecting. Alternately, arrange for separate transportation for that student.		



Entering and Exiting School Buildings: To limit contact as students and staff enter and exit the school facility, schools will implement the following standards during each phase of reopening.

Follow in All Phases	
Entry and exit points	Maintain maximum group sizes and physical distance recommendations to the maximum extent possible
Drop-off and Pick-up Processes	<ul style="list-style-type: none"> Establish multiple entry and exit points that enable the flow of students to move in a single direction. Do not allow visitors in the school building except under extenuating circumstances; adults entering the building should wash or sanitize hands prior to entering and wear face coverings at all times. Establish hand hygiene stations at the entrance to the facility so students can clean their hands before they enter. If a sink with soap and water is not available, provide hand sanitizer with at least 60 percent alcohol and supervise its use. Encourage families to drive their children to school if possible. This will reduce student numbers on buses.
School Visitors	Do not allow parents or other volunteer groups that are not core to the development of students into the building except under extenuating circumstances; adults entering the building should wash or sanitize hands prior to entering and wear face coverings at all times.



Practicing Prevention: In accordance with the CDC's strategies to encourage behaviors that reduce the spread of COVID-19, and with input from medical professionals, schools will implement the following standards during each phase of reopening.

Follow In All Phases	
High-touch surfaces	High-touch surfaces (e.g., desks, handrails, light switches, doorknobs, technology, etc.) are cleaned before and after each group's use.
Personal Hygiene	<ul style="list-style-type: none"> Students and teachers should have scheduled handwashing with soap and water or hand sanitizer every two hours as well as at the following times as found in CDC guidance including at arrival, before and after eating, before and after using outdoor play equipment, and upon exiting. Students should wash their hands or use hand sanitizer after changing any classroom; teachers in the classroom should wash their hands or use sanitizer every time a new group of students enters their room. Gloves are not necessary except for custodial staff or teachers cleaning their classrooms.
Intensified Daily Cleaning Efforts	Evaluate school facility fixtures, features, and equipment, to determine what kinds of surfaces and materials comprise each area. Follow CDC guidance on establishing cleaning and disinfecting protocols for various surface types and materials. Considerations include outdoor areas and areas unoccupied for more than 7 days.
Face Coverings	All staff and students are required to wear a face mask/covering while in school. Exceptions to face mask/coverings must be made for those for whom it is not possible due to medical conditions, behavioral issues, disabilities, or other health or safety issues. Additional guidance will be provided to support implementation for grades PreK-2, given the developmental stage of students, which may require additional flexibility, along with the use of face shields.
Symptom Monitoring	Assess students and staff upon arrival, and before entering classrooms, for temperatures at or above 100.4 F and for COVID-19 symptoms. Sample procedures can be found here .
Signage	Display COVID-19 informational signs in highly visible locations (e.g., school entrances, restrooms) that promote everyday protective measures and describe how to stop the spread of germs, such as by properly washing hands and properly wearing a face covering.



Student Transitions and Pull Out: To limit contact as students move around the school facility and to support schools in maintaining static groups, schools will implement the following standards during each phase of reopening.

Follow in All Phases	
Provider Pull Out	Clinical and other key providers may pull students out of classrooms for therapy needs. The provider is required to use face coverings and clean shared surfaces and equipment before the next student is served.
Controlling Flow	Limit the interactions of students during class transitions via one-way flow hallways, clearly defined space for two-way direction of student flow in hallways or staggered class changes to decrease the number of students in the hallway at one time.



Child Nutrition: Our schools will maintain a healthy environment and continue to offer healthy school meals to our students whether they are learning remotely or in-person.

	Phase 1	Phase 2	Phase 3
Available Meal Programs	Community Feeding Only	School Meals and Community Feeding available	
Eating at School	Provide Grab and Go style meals or get approval from families for meal delivery.	<p>School-supplied meals should be consumed in classrooms or in some other non-congregate setting.</p> <p>For students learning remotely, a meal service option must be created to provide 2 meals a day.</p>	<p>If cafeterias are used, stagger mealtimes for each group, adhere to maximum group size, and ensure six feet of distance between students to the maximum extent possible.</p> <p>For students learning remotely, a meal service option must be created to provide 2 meals a day.</p>



Extracurricular Activities: To allow schools to continue to offer an extended school day and non-academic experiences for students while complying with health and safety guidance, schools will implement the following extracurricular standards.

	Phase 1	Phase 2	Phase 3
Aftercare	N/A	Must adhere to maximum group sizes and physical distance protocols. For younger students unable to maintain physical distance, maintain static groups.	
Band and Vocal Music	N/A	Discontinued or theory classes only.	Resume with physical distance recommendations in effect
Field Trips	N/A	Discontinue field trips as students may engage with vulnerable populations.	
Athletics	Refrain from contact and high-risk sports	<p>Athletic activities are allowed to resume with the recommendations put forth in the Louisiana High School Athletic Association's Guidance for Opening Up High School Athletics and Activities</p> <p>No spectators at sporting events.</p>	<p>Contact / high-risk sports allowable within defined groups and in alignment with the Louisiana High School Athletic Association's Guidance for Opening Up High School Athletics and Activities.</p> <p>Limit on event spectators of 50 persons or less.</p> <p>All attendees should wear a face covering.</p>

PROTECTING VULNERABLE POPULATIONS

According to the [Center for Disease Control](#), COVID-19 is a new disease and there is limited information regarding risk factors for severe illness. Based on currently available information and clinical expertise, older adults and people of any age who have serious underlying medical conditions might be at higher risk for severe illness from COVID-19. To review a list of the populations at higher risk for severe illness, please visit the [CDC website](#), which is edited to include updated information as it is discovered.

Pursuant to [current school reopening CDC guidelines](#) and the [LDOE Reopening Guidelines](#), schools should limit any nonessential visitors, volunteers, and activities involving external groups or organizations as possible – especially with individuals who are not from the local geographic area (e.g., community, town, city, county). There is no validated data on how much risk these individuals incur by attending school in person and individuals will need to make the decision to attend in close consultation with their health care provider and school administrator.

In the event that a significant proportion of staff members are unable to return to the school facility, schools may consider developing an [innovative staffing plan](#).

Individuals need to make the decision to attend school in close consultation with their health care provider and school administrators.

WHEN A CHILD, STAFF MEMBER, OR VISITOR BECOMES SICK

As stated in the [LDOE Guidance for Reopening](#), “given the levels of COVID-19 currently in our communities, schools should plan for and expect that some students will get COVID-19 during the school year. As part of their planning to reopen, schools should expect that there will be students or staff who contract COVID-19 and that those students may expose other students/staff in the school setting.”

Upon review of best practices included in the [LDOE Reopening Guidelines](#) and in consultation with public health experts, the following guidelines should be used when a child, staff member or visitor becomes sick.

Before the start of school all schools should:

- Establish an area that can be used to isolate sick students or staff.
- Develop a cleaning and disinfection process for if someone is sick at school, in addition to plans for routine cleaning.
- Communicate with parents and staff about [what to do when you are sick](#).
 - [Here](#) is an example of an assurance letter schools can use to ensure parents are aware of their obligation to immediately pick up sick students from campus.
- Actively encourage staff and students who are vulnerable, sick, or who have had [close contact](#) with a person with COVID-19 to stay home.

District administrators and contracted public health experts will consult with schools prior to finalizing a decision to close an individual school due to COVID-19 spread within a school community. It is critically important that schools be able to pivot from in-person to distance learning so that disruption can be minimized while students and staff need to be away from a school building for extended periods of time. A set of scenarios for when school closure may be necessary, a reporting mechanism for information related to known COVID-19 cases or individuals who have come into direct contact with known positive case of COVID-19, and guidance for returning to school following illness will be provided in the Supplemental Guidance available by July 17, 2020.

ADDITIONAL GUIDANCE AND RESOURCES

This Roadmap is one of several updates from NOLA Public Schools about fall reopening, with more resources on a variety of reopening topics to be provided by July 17th. NOLA Public Schools in coordination with Children's' Hospital of New Orleans will also provide virtual training opportunities to teachers and other school support staff in the month of July. We also know we must nurture the whole child and support the well-being of our school staff as we move through this coming school year. Future Supporting Guidance and training opportunities will include, but not be limited to:

- Operational Health and Safety Standards Toolkit – Tools and resources to support compliance with standards. For example, resources will include:
 - Classroom Set-Up Templates
 - Exemplar Cleaning Procedures
 - Student Entrance and Exit Protocols
 - Guidance on creating a positive culture and support system for implementing face covering requirements
- Distance Learning Resources – Suggested resources to support the implementation of effective distance learning programs. For example, resources will include:
 - Instructional Materials Guidance
 - Diagnostic and Screener Guidance
- Specialized Guidance – Support for meeting the needs of every child. Materials will include resources and webinar trainings for:
 - Supporting students with disabilities
 - Supporting Social and Emotional Health of all students
 - Supporting the mental health of staff
- Detailed response plans for handling COVID-19 positive cases or contact with positive cases in the school community
- Tips for parents in preparing for the school year and in-person learning



LOUISIANA'S PLAN

A PLANNING GUIDE FOR SCHOOL SYSTEMS IN IMPLEMENTING PRIORITIES AND ALIGNING FUNDING

UPDATED
JUNE 25, 2020
10:00 AM



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OVERVIEW

Since Louisiana's school facilities first closed in March 2020 in response to the COVID-19 pandemic, school systems and the Louisiana Department of Education (LDOE) ensured that the safety of students and staff was of utmost priority. Additionally, LDOE and school systems have worked together on providing all students access to continuous learning while remaining safely at home. 100 percent of school systems report they are offering some type of continuous learning and plan to do so through the end of the school year. However, it is estimated that 31 percent of Louisiana students in K-12 do not have access to a device, and 33 percent do not have access to the internet, thereby limiting the accessibility of these opportunities for continued learning. As a result, and in anticipation of school facility closures or modified operations in the coming year, **the Department is focused on ensuring that school systems are prepared for a strong start to the 2020-2021 academic year.**

Louisiana school systems have created strong academic plans. A strong start to the 2020-2021 academic year must build on those academic **priorities** and ensure they are adapted to meet new academic and operational demands, including how to open and operate facilities that keep staff, students, and their families safe.

School systems' plans, submitted to LDOE through the Super App process, outline a coherent academic foundation, including a plan for the use of high-quality curricula, assessments, and teacher development. To ensure a strong start in 2020-2021 and the continued implementation of these plans, the Department will provide guidance and funding for quality and consistency of instruction, access to continuous learning, and safe, healthy facilities.

STRONG START FOR EVERY STUDENT

- **Every student's academic needs are identified** at the beginning of the year using a high-quality, standards-aligned diagnostic tool.
- There is **a plan for every student**, including extra time and support for students with the greatest unfinished learning from the prior year.
- There are **clear next steps for every high school student and recent graduate**, who will enter a new economy.

CONTINUOUS EDUCATION PLANNING

- All school systems must have strong, yet agile **continuous education plans** that provide standards-aligned instruction using high-quality curriculum during modified operations, including provisions for:
 - **1:1 device and internet access**, including assistive technology for students with disabilities.
 - **A strategic communications plan** to connect with every student on a daily basis, provide weekly feedback on students' work, and communicate a family's role in supporting their child's continuous learning.
 - **Versatile delivery methods** for instruction, related services, and professional development.
 - **Adaptive staffing models** that enable feedback on students' work and frequent communication with students and families.
 - **Flexible and opportunistic calendars and school schedules** that maximize learning opportunities in a dynamic public health context.

In support of the work that school systems will do to incorporate these new priorities into their plans for the school year, this Strong Start 2020 Planning Guide includes:

- CARES Act Funding Information
- The Strong Start 2020 Priorities
- Guidance on the Strong Start 2020 Application process
- Details on funding allowability
- A timeline
- Support information

School systems will use three resources to plan for and submit a successful Strong Start 2020 Application.

1. STRONG START 2020 PLANNING GUIDE

2. STRONG START 2020 PLANNING PRIORITIES

3. STRONG START 2020 APPLICATION

FUNDING FOR STRONG START 2020

There are multiple sources of K-12 funding available in the Coronavirus Aid, Relief, & Economic Security (CARES) Act to support Strong Start 2020 priorities:

- **Elementary and Secondary School Emergency Relief Fund (ESSERF)**
 - ESSER Formula Funds: Each LEA receives a proportional share based on its proportional share of the 2019-2020 Title I, Part A allocation (note: ESSER is NOT a Title I program).
 - ESSER Incentive Funds: Incentive grants are available to support key Strong Start 2020 Planning Priorities. School systems must commit to all Strong Start 2020 priorities and submit the application by May 29, 2020 to be eligible for ESSERF Incentive grants.
- **Governor's Emergency Education Relief Fund (GEERF):** Details are forthcoming.

ALLOWABLE USES OF ESSERF FORMULA GRANTS

The CARES Act outlines 12 uses of funds for ESSERF Formula grants (Sec 18003(d)):

1. Any activity authorized by the ESEA of 1965, including the Native Hawaiian Education Act and the Alaska Native Educational Equity, Support, and Assistance Act (20 U.S.C. 6301 et seq.), the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.) ("IDEA"), the Adult Education and Family Literacy Act (20 U.S.C. 1400 et seq.), the Carl D. Perkins Career and Technical Education Act of 2006 (20 U.S.C. 2301 et seq.) ("the Perkins Act"), or subtitle B of title VII of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11431 et seq.).
2. Coordination of preparedness and response efforts of local educational agencies with State, local, Tribal, and territorial public health departments, and other relevant agencies, to improve coordinated responses among such entities to prevent, prepare for, and respond to coronavirus.
3. Providing principals and other school leaders with the resources necessary to address the needs of their individual schools.
4. Activities to address the unique needs of low-income children or students, children with disabilities, English learners, racial and ethnic minorities, students experiencing homelessness, and foster care youth, including how outreach and service delivery will meet the needs of each population.
5. Developing and implementing procedures and systems to improve the preparedness and response efforts of local educational agencies.
6. Training and professional development for staff of the local educational agency on sanitation and minimizing the spread of infectious diseases.
7. Purchasing supplies to sanitize and clean the facilities of a local educational agency, including buildings operated by such agency.
8. Planning for and coordinating during long-term closures, including for how to provide meals to eligible students, how to provide technology for online learning to all students, how to provide guidance for carrying out requirements under the Individuals with Disabilities Education Act (20 U.S.C. 1401 et seq.) and how to ensure other educational services can continue to be provided consistent with all Federal, State, and local requirements.
9. Purchasing educational technology (including hardware, software, and connectivity) for students who are served by the local educational agency that aids in regular and substantive educational interaction between students and their classroom instructors, including low-income students and students with disabilities, which may include assistive technology or adaptive equipment.
10. Providing mental health services and supports.
11. Planning and implementing activities related to summer learning and supplemental after-school programs, including providing classroom instruction or online learning during the summer months and addressing the needs of low-income students, students with disabilities, English learners, migrant students, students experiencing homelessness, and children in foster care.
12. Other activities that are necessary to maintain the operation of and continuity of services in local educational agencies and continuing to employ existing staff of the local educational agency.

CODING BUDGET ITEMS

For each line in the Strong Start 2020 budget, school systems will (1) identify the fund (GEERF, ESSERF Formula, ESSERF Incentive) and (2) classify the use of funds (object code and EIC). Reference the table below for EICs specific to the Strong Start 2020 application. Note that the descriptions for each EIC are not comprehensive, and there will be cases where more than one EIC is appropriate. When that is the case, school systems should choose the most specific EIC available. For example, compensatory education for students with disabilities should be marked "CMPED" even though this expense could also be coded "SPED."

TYPE OF EXPENSE	EIC
Individual student supports - diagnostics, learning plans, tutoring	ISS
Core subject curricular supplements/materials for continuous learning	CRCL
Non-core/CTE supplements/materials for continuous learning	NCCL
High School Supports - IGPs and graduate transitions	HS
Social, emotional, and mental health screeners and supports	SEMH
English learner supports - curriculum access, compensatory ed, etc.	ELS
Students with disabilities supports - related services, AT, etc.	SPED
Student with disabilities - compensatory education	CMPED
Other subgroup supports - homeless, foster care, low-income	SUB
Professional development for workforce talent	PD
Adaptive staffing plan support	STAFF
Expanded learning time - summer school, early start, after-school	ELT
Student devices - laptops, tablets, etc	STUDEV
Student Connectivity - Internet access, phone access	WIFI
Early childhood - preschool seats and related costs	EC
Feeding	FEED
Sanitation - training and supplies	SAN
Operations - response and preparedness activities	OPS
Other allowable expense	OTHER
Nonpublic student devices	NPDEV
Nonpublic student connectivity - Internet access, phone access	NPWIFI
Other nonpublic school equitable services	NPES

EQUITABLE SERVICES TO NON-PUBLIC SCHOOLS

LEAs receiving funds under sections 18002¹ or 18003² of the CARES Act shall provide equitable services in the same manner as provided under section 1117³ of Title I, Part A of the ESEA of 1965 to students and teachers in non-public schools, as determined in consultation with representatives of non-public schools⁴.

The control of funds for the services and assistance provided to a non-public school under subsection (a), and title to materials, equipment, and property purchased with such funds, shall be in a public agency, and a public agency shall administer such funds,

- 1 The Governor Emergency Education Relief Fund (GEERF)
- 2 The Elementary and Secondary School Relief Fund (ESSERF)
- 3 [USED Equitable Services Guidance](#)
- 4 CARES Act Sec. 18005(a)

materials, equipment, and property and shall provide such services (or may contract for the provision of such services with a public or private entity).⁵

For more information about equitable services for CARES Act Funds, please refer to The CARES Act Equitable Services presentation located in the [Strong Start 2020 Library](#).

STRONG START FISCAL FREQUENTLY ASKED QUESTIONS

Please refer to the [Strong Start Fiscal FAQs](#) for answers to frequently asked questions. For questions not included in the FAQs, please contact the Grants Help Desk at LDOE.GrantsHelpdesk@la.gov.

- 5 [USED Non-public Education FAQs](#)

STRONG START 2020 PLANNING PRIORITIES OVERVIEW

The below Planning Priorities are designed to support school systems as they plan for a strong start to the 2020-2021 academic year. The priorities focus on actions and supports that will minimize learning gaps from the 2019-2020 school year, prepare for a strong start to 2020-2021, and plan for the future. School systems will have the opportunity to commit to the planning priorities within the eGMS Strong Start 2020 Application. Through these assurances and additional application questions, school systems will be able to unlock funding to support the priorities.

Aligned to the [School System Planning Domains](#), the Strong Start 2020 Planning Priorities address the unique circumstances school systems must consider for the upcoming school year and are structured by Domain, Priority, Priority Funding Guidance, Application Questions, and Resources.

DOMAINS: The four school system planning domains categorize the most critical areas for a strong start: Core Academics, Students with Diverse Needs, Workforce Talent, and LEA Systems.

PRIORITY: Each domain is further subdivided into 3-4 priorities. These priorities illustrate excellence and are aligned to the key decisions school systems will make for a strong start in 2020-2021.

PRIORITY FUNDING GUIDANCE: Identified for each priority is whether it is eligible for expenditures with competitive funding. Those that are eligible for competitive dollars list how school systems can use those funds to support the priorities.

APPLICATION QUESTIONS: Each priority requires school systems to complete an assurance. In addition, some priorities have application questions that school systems will complete in eGMS.




RESOURCES: Resources aligned to each priority are linked to support school systems in planning for each priority. All resources will be available by May 8.

SCHOOL SYSTEM PLANNING PRIORITIES

- 1. CORE ACADEMICS:** School systems have a coherent academic foundation including a plan for high-quality curriculum, assessment, and teacher professional development across all grade levels and core content areas. This includes a plan for ensuring students have access to individual student graduation planning services, quality TOPS University and Jump Start diploma pathways, and college and career transitional supports.
- 2. STUDENTS WITH DIVERSE NEEDS:** School systems address the unique needs of all students including English Learners (ELs) and students with disabilities. This includes a plan for early and accurate identification, high-quality and aligned instruction, specialized supports, and coordinated transitions. Schools also focus on creating and maintaining a learning environment that develops social, emotional, and academic skills.
- 3. WORKFORCE TALENT:** School systems implement strategies to identify, recruit, retain, and coach top talent—especially in high-needs schools and high-needs content areas.
- 4. LEA SYSTEMS:** School systems build a quality, cohesive birth to grade 12 system and organize themselves in a manner that helps struggling schools to improve. School systems that are Lead Agencies define a vision for their community network and increase access to and the quality of early childhood programs. Additionally, school systems can increase access to high-performing schools for students attending low-performing schools.

TIMELINE AND SUPPORT

TIMELINE

ACTION	DATE
 The Strong Start 2020 Planning Guide is released.	APRIL 30
 LDOE hosts Strong Start 2020 Webinar.	APRIL 30 AT 1:00 PM
 Strong Start 2020 Flowthrough funding becomes available in eGMS. Strong Start 2020 Application becomes available in eGMS.	MAY 1
 All Strong Start 2020 resources are available.	MAY 8
 School systems must submit the Strong Start 2020 Application within eGMS to be eligible for Incentive funds.	MAY 29
 BESE approves competitive allocations.	JUNE
 LDOE hosts Strong Start Funding webinar.	JUNE
 Strong Start 2020 Priority funds are loaded in eGMS.	JUNE 19

SUPPORT

Support for completing the Strong Start 2020 application will be provided through:

- [Strong Start 2020 Launch Webinar](#)
- [Strong Start 2020 Library](#)
- [LDOE Weekly Newsletters](#)
- [School System Planning and Superintendent Calls](#)
- [Network Teams](#)
- **Email:** Contact LDOE.GrantsHelpDesk@la.gov and include “Strong Start 2020” in the subject line.

STRONG START 2020 PLANNING PRIORITIES

CORE ACADEMICS

School systems have a coherent academic foundation including a plan for high-quality curriculum, assessment, and teacher professional development across all grade levels and core content areas. This includes a plan for ensuring students have access to individual student graduation planning services, quality TOPS University and Jump Start diploma pathways, and college and career transitional supports.

SCHOOL SYSTEM PRIORITY	PRIORITY FUNDING GUIDANCE	APPLICATION QUESTIONS	RESOURCES
The school system will assess students' academic needs through the use of high-quality screeners for students in grades K-3 and high-quality ELA and math diagnostics in grades 3 to high school. The school system will create an individual plan for students with the most significant learning gaps.	The Department will provide a screener for grades K-3 and a diagnostic for grades 3 to high school at no cost.	N/A	Diagnostic and Screener Guidance Addressing Unfinished Learning Gaps
The school system will have a plan for the continuous use of aligned curricular materials during periods of school facility closure or modified operations, exclusive to adaptations produced by instructional materials providers.	School systems may request funds to purchase additional materials/adaptations to ensure continuous learning using an approved high-quality curriculum.	Provide the high quality ELA, math, and/or science curriculum and the necessary supplements/ materials to ensure continuous learning.	Strong Start 2020: Instructional Materials Guidance Addressing Unfinished Learning Gaps
The school system will provide continuous instruction in non-core subjects, including CTE courses, during periods of school facility closure or modified operations.	School systems may request funds to purchase materials and other costs related to supporting synchronous, asynchronous, and blended instruction in non-core courses, including CTE.	Provide the non-core courses, including CTE, and necessary supplements/materials to ensure continuous learning.	Non-Core CTE Curriculum and Course Materials Guidance
The school system will ensure high school students continue on their paths to graduation and a successful post-secondary transition. The school system ensures each student has an updated IGP that reflects any changes needed due to interruption of instruction and that Class of 2020 graduates receive additional college and career support and mentoring through December 2020.	School systems may request funds for an approved post-secondary planning partner to support IGP updates for high school students and college and career transitions for graduated seniors.	Provide name of approved planning partner and additional cost.	Student Promotion and Planning Supports

STRONG START 2020 PLANNING PRIORITIES

STUDENTS WITH DIVERSE NEEDS

School systems address the unique needs of all students including English Learners (ELs) and students with disabilities. This includes a plan for early and accurate identification, high-quality and aligned instruction, specialized supports, and coordinated transitions. Schools also focus on creating and maintaining a learning environment that develops social, emotional, and academic skills.

SCHOOL SYSTEM PRIORITY	PRIORITY FUNDING GUIDANCE	APPLICATION QUESTIONS	RESOURCES
The school system will ensure the well-being of all students and educators by providing social and mental health supports, including mental health screening upon return to school.	The Department will provide access to a mental health screener, and additional supports will be available for students who qualify for trauma support services.	N/A	Guide to Supporting the Well-Being of Students and Staff Student Engagement and Success Partner Guide (coming soon)
The school system will ensure that English Learners have access to curriculum and service delivery, including language support services during periods of school facility closure or modified operations.	School systems may purchase supports for an approved high-quality curriculum to ensure continuous learning for English Learners.	N/A	Supporting ELs During School Closures/ Distance Learning
The school system will ensure all students with disabilities receive instruction and related services and have access to devices that meet their unique needs regardless of school facility closures and/or modified operations.	School systems may request funds to support: <ul style="list-style-type: none"> Assistive technology or adaptive equipment for students with disabilities. Training for direct service providers on remote service delivery from approved organizations in the Partnerships for Success Guide. 	What additional funds is the school system requesting to support assistive technology or adaptive equipment so all students with disabilities have access to instruction and related services? What additional funds is the school system requesting to train direct service providers on remote service delivery?	Partnerships for Success Guide Continuous Education for Students with Disabilities: Direct Services Virtual Small Group Instruction for Students with Disabilities: Privacy Guidance
The school system will conduct compensatory education reviews of all students with disabilities and will provide compensatory services accordingly.	The Department will make available funds to support costs related to compensatory educational services and will provide details later this year once school systems have assessed needs.	N/A	Timelines and Documentation During Extended School Closures for Students with Disabilities

STRONG START 2020 PLANNING PRIORITIES

WORKFORCE TALENT

School systems implement strategies to identify, recruit, retain, and coach top talent—especially in high-needs schools and high-needs content areas.

SCHOOL SYSTEM PRIORITY	PRIORITY FUNDING GUIDANCE	APPLICATION QUESTIONS	RESOURCES
The school system has a comprehensive professional development plan that provides professional learning for staff regardless of facility closures, including training for all teachers on distance learning protocols and methods. This plan will be updated by June 30.	School systems may request additional funding to modify professional development plans.	Provide the name of the approved professional development vendor and the additional cost of providing PD virtually.	Strong Start 2020: Professional Development Plan Template Professional Development Vendor Guide
The school system will ensure all Mentor Teachers and new ELA, math, and science Content Leaders are trained, either virtually or in-person.	The Department has provided support for these activities through the School System Planning Process.	N/A	Strong Start 2020: Professional Development Vendor Guidance Mentor Teacher and Content Leader Approved Vendor List
The school system will develop an adaptive staffing plan to be used during periods of school facility closure or modified operations.	School systems may request funds to partner with an approved vendor to develop an adaptive staffing plan.	Provide the name of the proposed partner and cost.	Expanding Learning Time Guidance

STRONG START 2020 PLANNING PRIORITIES

LEA SYSTEMS

School systems build a quality, cohesive birth to grade 12 system and organize themselves in a manner that helps struggling schools to improve. School systems that are Lead Agencies define a vision for their community network and increase access to and the quality of early childhood programs. Additionally, school systems can increase access to high-performing schools for students attending low-performing schools.

SCHOOL SYSTEM PRIORITY	PRIORITY FUNDING GUIDANCE	APPLICATION QUESTIONS	RESOURCES
The school system will develop a plan to reopen school facilities and, when necessary, close school facilities in line with forthcoming public health guidance.	N/A	N/A	Guidelines and Resources for School Reopening
The school system will adopt flexible and opportunistic calendars and school schedules that maximize learning opportunities throughout the year, as well as ensure continuous learning during periods of school facility closures or modified operations.	N/A	What strategies will the school system employ to expand/maximize learning time?	Expanding Learning Time Guidance
The school system will implement a strategic communications plan to: <ul style="list-style-type: none"> • Connect with every student daily; • Provide feedback on student work at least weekly; and • Help families understand their role in supporting their child's continuous learning. 	N/A	N/A	Guidance for Staffing and Student Monitoring Guidance on Communicating During School Interruptions
The school system will have a 1:1 student ratio for devices (laptop or tablet) and internet connectivity for every student grades preK-12 and a plan to issue these devices to students for use at home, if necessary. If Internet access is unavailable, the school system will ensure students have a reliable phone line.	School systems may request funds to purchase student devices and to provide connectivity for every student.	DEVICES How many students do not have access to a device? CONNECTIVITY How many students do not have access to the internet?	Technology for Continuous Learning
The school system will ensure that, at minimum, it maintains the number of four-year-old seats filled in the 2019-2020 school year.	School systems may fund four-year old seats.	N/A	Guidance for Early Learning at Home