



The GLOBE Academy

September 2026 Finance Committee Meeting

Date and Time

Monday September 21, 2026 at 8:00 AM EDT

Location

In person @ UC & Google Meet

Vision, Mission and Core Values

Vision: To develop globally minded citizens who have the knowledge, skills, and attitudes to effect positive change in our world.

Mission: The GLOBE Academy fosters Global Learning Opportunities through Balanced Education for children of all backgrounds. With a focus on dual-language immersion, an experiential-learning model, and a constructivist approach, GLOBE inspires students to be high- performing lifelong learners equipped to make a positive impact in the world.

Core Values: The GLOBE Academy's core values are expressed in the acronym, CREST: Community, Respect, Empathy, Sustainability and Trust. These values are expected of the governing board, faculty, staff, parents, and students. They are woven into daily life at GLOBE and incorporated into the curriculum.

- Community: We are inclusive, and we nurture and support one another.
 - Respect: We treat ourselves and each other with kindness and dignity.
 - Empathy: We strive to understand and share the feelings of others.
 - Sustainability: We aim to conserve our resources for optimal use in the present and future.
 - Trust: We are committed to honesty, transparency, and respectfully sharing our thoughts and encouraging others to do the same.
-

Agenda

	Purpose	Presenter	Time
I. Opening Items			8:00 AM
A. Record Attendance		Stephen Ellis	1 m
B. Call the Meeting to Order		Stephen Ellis	1 m
II. Approve Finance Committee Meeting Minutes			8:02 AM
A. Approve Minutes from June 2026 Meeting	Vote	Stephen Ellis	1 m
III. Lawsuit Proceeds			8:03 AM
A. Discuss Options for Use of Funds	Discuss	Christi Elliott-Earby	30 m
The school recently received a lawsuit settlement from DCSD. The school administration was to draft ideas about how to use the funds. The committee will discuss these ideas			
IV. Private Business Use			8:33 AM
A. PBU Discussion	Discuss	Denise Clayton-Purvis	10 m
Denise to present the deck she prepared concerning PBU limitations as outlined by the bond covenants			
V. Monthly Financial Review			8:43 AM
A. Summer 2026 Financial Review	FYI	Denise Clayton-Purvis	8 m
• Budget to Actual Review • Statement of Net Position • Statement of Activities			
VI. Audit Update (if any) & 403b			8:51 AM
A. Audit & 403b discussion	Discuss	Denise Clayton-Purvis	8 m
Has Doug Erwin begun the audit?			

Purpose	Presenter	Time
---------	-----------	------

GLOBE currently does not have a retirement contribution program in place for staff members. Denise reached out to 3 providers (TIAA, fidelity and Vanguard), but only got traction with TIAA. Need to discuss progress & next steps

VII. Closing Items

8:59 AM

A. Adjourn Meeting	Discuss	Stephen Ellis	1 m
--------------------	---------	---------------	-----