Organization Plan

B.1 Applicant Organization

Applicant's history, establishment, evolution, and how operating a charter school became part of its mission

In 2012 Delite Gaddie established John Hancock Academy, Inc. and became its first Corporate Director, initial President of the school's Governing Board, and CEO/Executive Director.

Delite Gaddie has been directly involved in the K-12 education business for nearly four decades. She started and is presently involved in operating three charter schools: Burke Basic School (est. 2000, Mesa, AZ); Happy Valley School (est. 2000, Peoria, AZ); Val Vista Basic School (est. 2011, Mesa, AZ, a replication charter of Happy Valley School).

Delite Gaddie's quest for a better K-12 education started in the 1960s when she observed and experienced firsthand some of the problems of elementary school public education in relation to her own children. At the time one of her children was lagging behind three grade levels and could not even read. She was determined to make a change in public education - she rallied 600 parents and challenged the school district to change an ineffective educational methodology, claimed as "innovative" at the time (a two-teacher team teaching 60+ children in same classroom), which method turned out to be a setback for many children, including her own in terms of educational outcomes.

The reluctance of the school district to institute changes that would positively impact academic achievement prompted Delite Gaddie to start a private school, where her goal was to re-institute abandoned, but time-tested, proven curriculum and instructional methodology. The same child that was lagging three grades behind and could not read, enrolled at the school, started advancing two grade levels per school year and graduated at the age of 16 as the valedictorian of the graduating class. For her achievements Delite Gaddie was named Educator of the Year for SY1983/84 by the Arizona Private School Association.

While the early start of Delite Gaddie in education during the 60s, 70s, and 80s of the 20th century have proven that her educational method and approach are successful, the pinnacle of her educator career came when she started and run public charter schools - Happy Valley School and Burke Basic School. Just a few highlights and data of Happy Valley School indicate the merits of the Gaddie Educational Model and the applications developed by Delite Gaddie (Source: ACSA, 2012; data for SY2010/11): an Excelling and A-rated school; 97.2% Reading proficiency compared to 64% average for Arizona public schools; 90.6% Math proficiency compared to 79% average for Arizona public schools.

Ms. Gaddie's direct 12-year leadership role and involvement with Burke Basic and Happy Valley schools also prove the adequacy of her school management approach and practices: for example, Happy Valley was able to issue a $5,000,000 tax-exempt school bond issue for its facility, and has never been late with any payments. Furthermore, according to the Arizona Charter School Association's Education Evaluator dataset for SY2011 the Happy Valley School operation cost the taxpayer only $6,709 per student, which is substantially below the cost per student compared to similar Excelling and/or A-rated district or charter public schools. In addition, the schools started and operated by Delite Gaddie do not charge the parents any upfront fees or extra fees, while providing a full-day Kindergarten and school bus transportation services at no additional cost to the parents. The cash flows of those schools have always been positive and the operating budgets and balance sheets have always been within manageable and acceptable financial limits.

Establishing and operating the new John Hancock Academy charter became a mission for Delite Gaddie in the pursuit of delivering high quality public education by blending best practices developed over the years at Burke Basic School and Happy Valley School, including educational, academic, management, cost of education, community, etc.

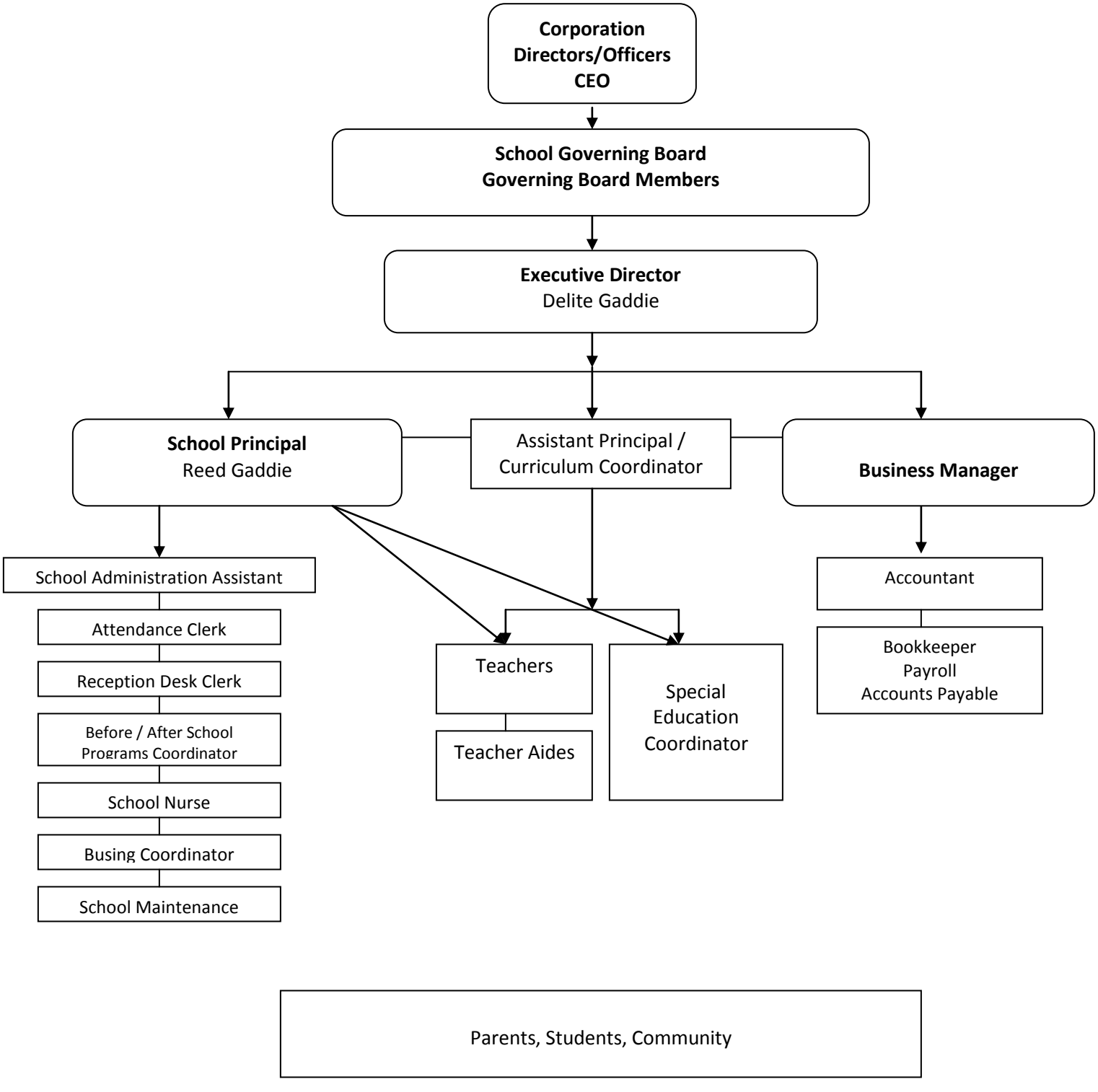
John Hancock Academy, Inc. is established on April 27, 2012. The incorporation papers are duly filed with he Arizona Corporation Commission. An amendment to the Articles of Incorporation was filed on June 27, 2012. The corporation will apply for and EIN number, DUNS number and 501c3 tax exempt status.

John Hancock Academy, Inc. is established as a separate entity, independent from the other schools. The new school will epitomize the Gaddie Educational Model in its entirety. The Gaddie Educational Model was developed by Delite Gaddie and her husband Ernest Gaddie. It evolved as a result of over 30 years direct experience, which each one of them has had in the classroom and more than 20,000 students successfully educated with it. This is an authentic, uniquely created educational model, which incorporates a proprietary curriculum and instructional methodology aligned to the educational philosophy of history, heritage, and character, developed, tested and refined by the founder, Delite Gaddie, over a thirty-year period in the schools she founded.

Organizational chart

(Organizational Chart located on next page)

JOHN HANCOCK ACADEMY: ORGANIZATIONAL CHART



Organization Chart Narrative and Reporting Structure

John Hancock Academy, Inc is a not-for-profit Arizona corporation. John Hancock Academy, Inc. was formed to operate John Hancock Academy, a public charter school in the State of Arizona.

- The Corporate Board is Responsible for the organizational, fiscal and legal matters of the corporation. The Corporate Board is the Charter Holder, oversees the charter contract and approves major financial commitments, provides fiscal guidance to the School Governing Board, The Corporate Board selects and appoints the Governing Board for the school, oversees the School Governing Board regarding: school policies, school educational programs, school business operations.

- The School Governing Board is the policy making body for the school, determines the charter school mission and purpose. The School Governing Board sets policies, approves contracts for teachers and staff, reviews and approves the budgets, oversees the performance of the school and oversees contracted services. The School Governing Board selects and appoints the charter school Principal.

- The Executive Director is a administrative/managerial and oversight position, created by the corporate board to integrate the three major functions of the school - school operations, delivery of the educational program and financial. The Executive Director is appointed by the Corporate Board. The Executive Director oversees and monitors the School Principal (day-to-day operations), the Assistant Principal (curriculum and instruction) and the Business Manager (financial management) of the school. The Executive Director oversees the interviewing and hiring of all employees and presents to the School Governing Board. The School Governing Board approves the contracts of all hired personnel of the school. The Executive Director reports to and works collaboratively with the School Governing Board.

- The Principal is responsible for the day-to-day administrative operations of the school. The School Principal also provides general oversight of the performance of the teachers and the Special Education Coordinator. The Principal reports to the Executive Director.

- The Assistant Principal/Curriculum Coordinator is directly in charge of the curriculum and instructional program and directly oversees the performance of the teachers, teacher aides and the special education coordinator. The Assistant Principal/Curriculum Coordinator reports to the Executive Director.

- The Business Manager is responsible for the financial management and reports to the Executive Director.

- Parents form Parent Committees or act individually in their communication with the Governing Board, Principal and Teachers.

Subsidiary relationship of the applicant organization to another organization.

There is no subsidiary relationship between John Hancock Academy, Inc. and any other organization. John Hancock Academy, Inc. is established as a separate, independent and unrelated entity.

Current or prior charter operation by the applicant

The applicant is John Hancock Academy, Inc. established on April 27, 2012 as a not-for-profit Arizona Corporation with the sole purpose to operate John Hancock Academy, a K-6 charter school.

Role of each Principal in the organization

John Hancock Academy, Inc. corporation currently has two principals, Delite Gaddie and Reed Gaddie, who will serve as the directors on the initial Board of Directors. They will also serve as the Authorized Charter Representatives for John Hancock Academy, Inc.

Role of the Corporate Board

Corporate Directors:

Delite Gaddie
Reed Gaddie

The Corporate Board appoints and is responsible for the authorization, oversight, and, when required, ratification of acts to be carried out for the charter school being operated by the corporation. The Corporate Board is responsible for the ratification of the acts of the Administration / School Principal and the performance of any and all other acts required to be formed by the Corporate Board by state and federal statute and the charter contract entered into by the Sponsoring Board pursuant to Arizona Charter School Law, A.R.S. 15-181 et. seq.

Officers of the Corporation:

President - Delite Gaddie
Vice-President - Reed Gaddie
Secretary - Delite Gaddie
Treasurer - Delite Gaddie

The Officers of the Corporation are elected by the Corporate Board. The President of the Corporation is the Chief Executive Officer of the corporation, subject to the control of the Corporate Board, and has general charge of the Corporation's business, and supervision of its affairs. The President keeps the Corporate Board fully informed in regard to the business of the corporation and makes due reports to them. The Vice-President has all the powers and will perform all duties of the President in the event of disability or absence of the President. The Treasurer has general supervision authority over the finances of the Corporation, subject to the control of the Corporate Board. The Secretary is in charge of all books and papers of the corporation, gives all notices for the making of all statements and reports required of the Corporation or of the Secretary by law, enters in the minute books the minutes of all meetings of all committees and the Board of Directors.

Responsibilities of the Corporate Board

- Corporate Policy setting
- Fiscal guidance
- Ongoing governance oversight
- Appoint the School Governing Board

- Oversee the School Governing Board regarding: school policies, school educational programs, school business operations.

Delite Gaddie is Founder, Corporate Director, Corporate CEO initial President of the school's Governing Board, and Executive Director of John Hancock Academy. She is an Authorized Representative of John Hancock Academy, Inc.

Ms. Gaddie's direct 12-year leadership role and involvement with charter schools prove the adequacy of her school management approach and practices: for example, Happy Valley was able to issue a $5,000,000 tax-exempt school bond issue for its facility, and has never been late with any payments. Furthermore, according to the Arizona Charter School Association's Education Evaluator dataset for SY2011 the Happy Valley School operation cost the taxpayer only $6,709 per student, which is substantially below the cost per student compared to similar Excelling and/or A-rated district or charter public schools. In addition, the schools started and operated by Delite Gaddie do not charge the parents any upfront fees or extra fees, while providing a full-day Kindergarten and school bus transportation services at no additional cost to the parents. The cash flows of those schools have always been positive and the operating budgets and balance sheets have always been within manageable and acceptable financial limits.

Reed Gaddie is Co-Founder, Corporate Director, Corporate Principal and Officer (Vice President) and School Principal of John Hancock Academy. He is an Authorized Representative as well. Reed is an educational entrepreneur and has been involved with charter schools operation for over a decade.

Current or prior charter operation by any Principal

1. DELITE GADDIE

- Involvement in the John Hancock Academy, Inc. Corporation:

Delite Gaddie is a corporate principal - Director and Officer (President, Secretary and Treasurer) of John Hancock Academy, Inc. She is an Authorized Representative of John Hancock Academy, Inc.

- Involvement in John Hancock Academy's governance:

Delite Gaddie is the president of the Governing Board for John Hancock Academy.

- Involvement in the School Operations of John Hancock Academy:

Delite Gaddie is the Executive Director of John Hancock Academy. The Executive Director is the school's top leader and chief administrative officer. Delite Gaddie possesses strong communication and leadership skills to perform that leadership function. She has over 35 years of experience in school administration, including over 12 years of experience in charter school administration in this and other top organizational positions. As founder of several charter schools she has been involved in almost all aspects of school administration - establishment, planning, design, start-up, implementation, and growth. She is inherently dedicated to creating a high quality school aligned with the Gaddie Educational Model and education philosophy. Delite Gaddie has proven management skills and an excellent grasp of standards-aligned curricula and testing, charter school regulations and operations, special education and ELL requirements, and other matters as applicable to charter school administration.

Additionally, Delite Gaddie has demonstrated an understanding and ability to operate a fiscally stable school, for example the financial performance of Happy Valley School and Burke Basic School - charter schools that she co-founded and successfully operated. In those respective roles, Delite Gaddie has demonstrated profound knowledge on the school budgeting process and had the top role in enforcing stringent fiscal policies and spending practices. The solid financial results that can be found in the annual school audits and financial performance of each one of those two charter schools demonstrate Ms. Gaddie's knowledge, ability, skills and experience to run a charter school in an efficient, but sustainable way. In those positions, Ms. Gaddie has been accountable and reporting directly to the respective School Governing Board.

Prior to starting John Hancock Academy, Delite Gaddie has experience in establishing and operating charter schools, as follows:

Delite Gaddie co-founded and started the following charter schools:

- Burke Basic School, LLC (est. 2000, Mesa, AZ, charter transferred to ASBCS from Peach Springs School District);
- Happy Valley School, Inc. (est. 2000, Peoria, AZ, charter transferred to ASBCS from Peach Springs School District); and
- Happy Valley School East, Inc.(est. 2011 as a replication of Happy Valley School; Mesa, AZ; authorized by ASBCS).

Delite Gaddie engaged in charter school governance:

- Former LLC Member of Burke Basic School, LLC. Currently she is not a member of the LLC.
- Corporate Director and Officer (Secretary/Treasurer) of Happy Valley School, Inc. and is a Governing Board member of Happy Valley School.
- Corporate Director and Officer (Secretary/Treasurer) of Happy Valley School East, Inc. and is a Governing Board member Happy Valley School East.

Delite Gaddie engaged in charter school management and operations:

- Delite Gaddie has been involved fulfilling functions of Executive Director and Business Manager of each one of those schools.
- Between 1999-2006 she performed the functions of Business Office Manager/Advisor for Burke Basic School.
    - Between 1998-1999 she performed the functions of Accountant/Comptroller for Noah Webster Basic School.[1]

While Delite Gaddie is still involved in providing academic support (Gaddie Curriculum materials and teacher manuals) and business office support (oversight and guidance on management and finance) for Burke Basic School and Happy Valley School. She has trained and gradually delegated those executive functions to other staff members and leaders of those respective school organizations, so that now she could focus on the establishment and development of John Hancock Academy.

Outside charter operations, Delite Gaddie has been involved as the founder/owner/Cheif Financial Officer in the establishment, implementation, operation and management of John Hancock Academy, same name, but different, private K-12 school, which she co-founded and operated during the period 1970-1978,

[1] Other immediate members of the Gaddie family started and operate Noah Webster School (est. 1997, Mesa, AZ), but Delite Gaddie does not have any participation in that school.

and Mountain State Technical Institute, a private post-secondary college, which she co-founded and operated from 1978 to 1991.

In 1970, Delite Gaddie established John Hancock Academy as a private alternative to the pre-charter public education system of the 1970s, after she observed and experienced firsthand some of the problems of elementary school public education in relation to her own children. At the time one of her children was lagging behind three grade levels and could not even read. She was determined to make a change in public education - she rallied 600 parents and challenged the school district to change an ineffective educational methodology, claimed as "innovative" at the time (the core idea, of which was a two-teacher team teaching of 60+ children in the same classroom). Such method, though considered an innovation at the time, turned out to be a setback for many children, including her own child, in terms of educational and academic outcomes.

The reluctance of the school district to institute changes that would positively impact academic achievement prompted Delite Gaddie to start a private school, where her goal was to re-institute abandoned, but time-tested, proven curriculum and instructional methodology. The same child that was lagging three grades behind and could not read, enrolled at the school, started advancing two grade levels per school year and graduated at the age of 16 as the valedictorian of the graduating class. For her achievements Delite Gaddie was named Educator of the Year for SY1983/84 by the Arizona Private School Association.

In 1978 Delite Gaddie established the Mountain State Technical Institute (MSTI), a private post-secondary college, in a quest to give students an opportunity to continue their education and fill in a need for quality work force. In a short period of time MSTI became the third largest career/trade school in Arizona. The Institute and its curriculum were recognized in publications in four trade magazines. Those publications stated that this MSTI curriculum, so-designed and co-developed by Delite Gaddie, raised the bar of professional training and education, which was unavailable anywhere in the nation except at MSTI. For the fifteen years of operations, the Institute had over 4,500 graduates who obtained after their graduation full-time high paying job positions.

2. REED GADDIE

- Involvement in the John Hancock Academy, Inc. Corporation:

Reed Gaddie is Co-Founder, Corporate Director, Corporate Principal and Officer (Vice President) of John Hancock Academy, Inc. He is an Authorized Representative of John Hancock Academy, Inc. as well.

- Involvement in the School Operations of John Hancock Academy :

Reed Gaddie will be the School Principal for John Hancock Academy. Reed Gaddie possesses the necessary skills, experience and qualifications as required for that position. Reed has the necessary experience required for the position: 5 years of experience in the overall operation of self-contained, private and/or public schools, including supervision of faculty, support staff, teachers, curriculum development, educational activities, accounting and finances, and general operations.

Raised as an educational entrepreneur, the son of Delite and Ernest Gaddie, was involved with the charter schools movement at the very onset. He helped a fellow entrepreneur start Sequoia schools. He was also

was involved with the start-up and operation of Arizona Career and Technology charter school[2]. He helped with the start-up operations of Burke Basic School and Happy Valley School. He continued to work at Happy Valley School as a facility manager and curriculum consultant. Reed brings to John Hancock Academy substantial experience with start-up operations, facility construction and maintenance and most importantly - the Gaddie Educational Model - curriculum and instructional methodology.

Reed Gaddie received a quality academic education experience in a disciplined peaceful and orderly learning environment and instruction from high quality teachers when he attended his parent's private accredited K-12 school named John Hancock Academy, which was a college prep school with a high percentage of graduates that subsequently earned college or various other post-secondary degrees.

Reed Gaddie demonstrated his academic mastery of the honors level curriculum at the private John Hancock Academy operated by the Gaddie family, and graduated valedictorian of his graduating class with honors when he was 16 years old.

In the distinctive family educator environment at his parent's private accredited K-12 school, Reed Gaddie served as a volunteer and began tutoring students who attended his parent's school when he was ten years old, which developed him a passion for teaching and education.

Reed Gaddie has a post-secondary vocational education degree from Mountain State Technical Institute, a private post-secondary college. He has received numerous certifications for his continuing education. [3] Reed Gaddie has worked and is still involved as a curriculum and facility consultant at Happy Valley School.

After graduating with honors from Mountain State Technical Institute (Thermodynamics and Industrial Technology Engineering), Reed was hired at Diversified Mechanical Inc. and immediately engaged to lead a team of professionals involved in the design, construction, start-up, and stationary engineering of several multi-million dollar high rise building projects in the downtown Phoenix area. This experience proved very useful in his work on charter school facilities, more specifically in the facility of Happy Valley School.

Later on, Reed Gaddie became a full-time instructor at the Mountain State Technical Institute, where he taught advanced technical post-secondary courses. In this position he has been awarded the “Teacher of the Phase” award many times. His accomplishment in teaching/instruction lead to his administrative promotion at Mountain State Technical Institute to the school administrator position of Training Director, in which position he supervised of the entire department operations including compliance with all state and federal agencies and oversight of more than 20 instructors, support staff and lab assistants. Reed Gaddie wrote a 1200- hour course curriculum at the Mountain State Technical Institute. As a result, the State Board of Education unanimously approved MSTI to offer this higher level degreed course of instruction, which was also recognized and acknowledged by the Arizona State Governor's office. Reed Gaddie received a recognition for meeting the needs for trade qualifications, which was not available prior to the development of that curriculum and was recognized in publications in four trade magazines, which

[2] The school is now closed.

[3] Certificate of Achievement for the Arizona State Business Management Exam by the National Assessment Institute, Universal Certification
Certificate of Completion from Ferris State University
Certificate of Participation by the Arizona Department of Education K-12 Academic Standards - 2010 AZ ELA administrator Training course by ADE.
Certificate of Participation by the Arizona Department of Education K-12 Academic Standards - 2010 K-12 Academic Standards for the 2010 AZ English Language Arts Standards
Certificate of Completion for Completion of all 16 Teacher Training Modules from the Federal accrediting entity - NATTS - National Association of Trade and Technical Schools (authorizers of the federal student loan program)

stated that this curriculum raised the bar of professional training and education, which was unavailable anywhere in the nation except at MSTI. Over a period of ten years, Reed Gaddie and the instructional faculty that he trained was responsible for the education, training and placement on the job of approximately 3,800 graduates who obtained full time high paying positions.

Arizona State University (ASU) also recognized the accomplishment of Reed Gaddie and the merit of the 1200-course curriculum that he developed at Mountain State Technical Institute. ASU requested Reed Gaddie to develop an internship program for the ASU's Central Plant engineer interns. This was a very complex and challenging task due to the fact that the rules and regulations of three governmental entities had to be satisfied with the outcome of this internship course. Taking that challenge, Reed Gaddie completed the design and development of the ASU Central Plant engineer internship program, which meet all criteria and compliance components, for which Reed Gaddie was recognized by ASU with a formal acknowledgement and a letter of recognition.

This experience of Reed Gaddie provides a foundation of skills and experience for effective School Principal work and leadership. Furthermore, the skills and experience gained at MSTI and the work with ASU have found a direct application for over five years in working and being involved in charter schools operated by the Gaddie family, such as Happy Valley School and Burke Basic School. Those activities include: studying the charter school legislation and laws, planning and designing of the schools' business and educational operations, such as marketing, community relations, working with parents, facility development and construction, including facility upgrades and compliance with applicable state and local jurisdiction laws, planning and executing purchase agreements and purchases for the organization, knowledge of the Uniform System of Financial Record for Charter Schools (USFRCS), procurement rules and audit requirements, setting up internal systems for the organizations.