Organization Plan

B.3 Management & Operation

Roles and responsibilities for administering the day-to-day activities of the school

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 School 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. School Principal is actively involved in oversight of the administrative personnel, executions of various contracts with vendors, overall smooth functioning of the school operation on a day-to-day basis. The School Principal works closely with the Business Manager when making decisions regarding the day-to-day operations of the school. The School 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.

In the Gaddie charter school organizational model, the administrative/business and educational/curriculum/instruction day-to-day functions and duties are divided between the School Principal and the Assistant Principal. The main distinction and delineation between the functions of the School Principal and the Assistant Principal, which is also integrated in the PMP are as follows:

The School Principal:	The Assistant Principal:
In **STRATEGY I: Provide and implement a curriculum that improves student achievement:**	
• Together with the Executive Director is responsible for the securing of curriculum materials and resources aligned with standards in the classrooms •	• Creates curriculum maps • Directly oversees the implementation of instruction • Directly oversees In-school and after-school tutoring for students who demonstrate a need for additional learning time
In STRATEGY II: Develop and implement a plan for monitoring the integration of the Common Core State Standards into instruction.	
• Assures Assistant Principal duties described to right are executed with precision and accuracy. • Supervises/oversees teacher/student concerns and need are met, provide resources to teachers to help them provide quality instruction, maintain a peaceful yet joyful learning experiences in classrooms and on campus.	• Ensures curricular materials, curriculum content, curriculum maps, syllabi, and assessments are appropriately aligned and updated with the Arizona and Common Core Standards and any standards changes and updates • Reviews teacher's weekly lesson plans to ensure they are aligned with the Arizona and Common Core standards and Gaddie Educational Model and in keeping with the established curriculum maps and guides • Observes teachers to ensure instruction, assessments and mastery is standards-aligned and effective.
In STRATEGY III: Develop and implement a plan for monitoring and documenting student proficiency:	
• Together with the Assistant Principal reviews AIMS results to determine individual and whole-class strengths, gaps and areas of concern • Supervises Assistant Principal and analyzes assessment data to determine where instruction modification or curriculum development may be required to maintain improvement of academic proficiency of students	• Together with the School Principal reviews AIMS results to determine individual and whole-class strengths, gaps and areas of concern • Performs screening at the beginning of the school year to determine placement of student in Forms
In **STRATEGY IV: Develop and implement a professional development plan that supports effective implementation of the curriculum:**	
• Together with the Assistant Principal reviews and analyzes standardized test results to determine a school improvement plan, including setting academic achievement goals for the year and necessary remediation strategies • Before the school year starts, together with the Assistant Principal participates in teachers' meetings to discuss strategies and instructional methods for the upcoming academic year. • Together with the Assistant Principal observes teachers to ensure math instruction is curriculum based and effective; one-on-one meetings between the Assistant Principal and teachers to discuss strategies, areas of strength and methods for improvement • Together with the Assistant Principal performs end-of-year review of curriculum content to discuss what worked, what might need to be changed (textbooks, materials, projects, etc.) for the next school year.	• Together with the School Principal reviews and analyzes standardized test results to determine a school improvement plan, including setting academic achievement goals for the year and necessary remediation strategies • Before the school year starts, together with the School Principal participates in teachers' meetings to discuss strategies and instructional methods for the upcoming academic year. • On early-release days (Wednesdays), teachers will meet to discuss remediation strategies, review curriculum, and exchange ideas to improve individual and whole-class academic performance. • Teachers will participate in a variety of content-based and instructional strategy professional development based on demonstrated need and best practices • Together with the School Principal will observe teachers to ensure math instruction is curriculum based and effective; one-on-one meetings between the Assistant Principal and teachers to discuss strategies, areas of strength and methods for improvement • Together with the School Principal performs end-of-year review of curriculum content and changes (textbooks, materials, projects, etc.) for the next school year.

Operational plan:

John Hancock Academy
School Personnel Projections

Year/Student Enrollment (SC)	**Year 1/350**		**Year 2/510**		**Year 3/570**	
	Number	**FTE****	**Number**	**FTE**	**Number**	**FTE**
Personnel Type: Administrative						
Executive Director	1	0.25	1	1.00	1	1.00
School Principal	1	1.00	1	1.00	1	1.00
Assistant Principal	1	0.50	1	0.50	1	1.00
Business Manager	1	1.00	1	1.00	1	1.00
School Administration Assistant	1	0.50	1	1.00	1	1.00
Registrar /Attendance Clerk	1	0.50	1	1.00	1	1.00
School Busing Coordinator	1	0.50	1	0.50	1	0.50
School Maintenance	1	0.50	1	0.50	1	0.50
TOTAL:	**7**	**4.75**	**7**	**6.50**	**7**	**7.00**

Oversight responsibilities:

Instruction

- The Assistant Principal/Curriculum Coordinator is directly in charge of the curriculum and instructional program and assessment 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.

Curriculum and Assessment (mandated State testing)

- The Assistant Principal/Curriculum Coordinator is directly in charge of the curriculum and instructional program and assessment 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.

Staff Development

- The Assistant Principal oversees staff development.

Financial Management

- The Corporate Board will be responsible for developing and overseeing the school's financial policies, including the establishment, and monitoring compliance with, procurement and purchasing policies. The Corporate Board will collaborate with the Business Manger to prepare the annual budget, develop a 3-year financial forecast, and long-term financial planning. John Hancock Academy, Inc. also has a business office, which works closely with the Business Manager, and is responsible for human resources, payroll and bookkeeping. The school may consider contracting with Robert Brown of Compliance Services, Inc., (CSI) for accounting services, financial consulting, and to maintain compliance with state and federal requirements. CSI has been successfully working with charter schools since 2000. The Business Manager meets monthly or weekly, as needed, with the Executive Director to plan and review the budget, and submits financial reports to the Corporate Board and the State. CSI also offers grant management services, as well as oversight of compliance with state and federal regulations. The Corporate Board annually reviews CSI's performance to ensure quality services.

  The Governing Board will supply the Corporate Board any pertinent information to assist in financial planning and decision-making that it obtains through its meetings.

Contracted Services

- The Corporate Board is responsible for researching, generating requests for proposals, reviewing at least three quotes for each service, and approving any professional services to be contracted by the school. The Corporate Board will review with the Principal the performance of all contracted service providers annually to ensure the quality of their services, cost effectiveness, and to determine if the provided services remain in alignment with the school's mission.

Personnel

- 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.

Grants Management

- The Business Manager oversees the grants management.

Student Accountability Information System (SAIS)

- The School Principal oversees SAIS. The School Principal has the necessary working knowledge to oversee SAIS and attendance reporting. The School Principal has practical knowledge and experience with SAIS and attendance reporting from Happy Valley School. The School Principal will test the existing skills and ability of the applicant of this position and will require the applicant to complete the DOE SAIS training course. The School Principal will maintain a log of their efficiency and reporting to make certain all ADM and other student information is updated constantly and reporting is completed in a timely manner.

Critical skills/experience

<u>Executive Director</u>

- The Executive Director is the school's leader, and will need to have strong communication and leadership skills. The person will have many years of experience in school administration (at least 5 years) and be dedicated to creating a high quality school that is aligned with the Gaddie Educational Model and education philosophy.
- The person must demonstrate an skill in supervision of a School Principal, Assistant Principal and Business Manager performing their duties as described above in an effective manner.
- Additionally, the Executive Director will need to demonstrate an understanding of and ability to operate a fiscally stable school. Though the Business Manager will be considered the financial expert, the Executive Director will need to have the knowledge necessary to implement the Business Manager's suggestions, as well as adhere to the school budget and enforce stringent fiscal policies. This position reports directly to the School Governing Board.

School Principal

- The minimum qualifications for this position is two years experience in the overall operation of a self-contained, private or public school, including directing educational activities, accounting and finances, and general operations.
- The education for this position should include formal post-secondary training in business or school administration, including a degree in education and/or business administration. Minimum 2 years of related experience in public or private school management or administrative related position may substitute for this degree.
- Experience should be sufficient to carry out the duties of this position and should include the following:
    a. Planning and implementing educational programs, including establishing goals, developing competencies, implementing curriculum, and testing student achievement.
    b. Balancing a budget, making purchases, controlling spending, increasing revenues, and setting up internal systems to achieve the goals of the school, as set fourth in the charter's financial plan.
    c. Understand the Uniform System of Financial Record for Charter Schools (USFRCS), procurement rules and audit requirements.
    d. Knowledge, experience or training of SAIS student information management and attendance reporting.
    e. Marketing and enrolling students.
    f. Building positive relationships with students and parents. Meeting parents' needs and interests.
    g. Understanding and/or prior experience with charter school law and implementation.

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 to qualify for the position and has experience in the overall operation of self-contained, private and public schools, including directing 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[1]. 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.

[1] The school is now closed.

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 from Mountain State Technical Institute, a private post-secondary college. Additionally, he obtained extensive trainings and certifications, including a most recent completion of a course at ADE on the Common Core Standards. He 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 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 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.

Business /Manager

Qualifications:

- The qualifications for this person is to have at least two years experience in managing the finances of a school, public or private.
- He/she must have experience in accounting, and have computer skills.
- Preferably have an MBA or undergraduate accounting or finance degree, but will consider comparable extensive experience.
- Knowledge of the Uniform System of Financial Record for Charter Schools (USFRCS), procurement rules and audit requirements.
- Demonstrate commitment to fulfilling the mission of John Hancock Academy, and its philosophy and values.
- Demonstrate high level of personal integrity, professionalism, and drive to succeed.
- Demonstrate strong organizational, planning, and implementation skills.
- Have experience and/or training in financial and operational management.
- Demonstrate the ability to give and receive constructive feedback.
- Have a valid fingerprint clearance card.
- Upon evaluation of the efficiency of operations, the school may contract for outside services for this position.

Duties:

- Ensure that the financial and operational aspects of the school further the fulfillment of the school's mission.
- Develop the financial plan of the school, provide financial oversight and management.
- Oversee Grants Management
- Meet monthly or weekly, as needed, with the Executive Director to plan and review the budget, and submits financial reports to the Corporate Board and the State.
- Work closely with the School Principal when making decisions regarding the day-to-day operations of the school.
- Implement day-to-day accounting and business activities.

John Hancock Academy will contract for accounting services, financial consulting, and to maintain compliance with state and federal requirements. These services include consultant work to review expenses and general ledger accounting, and to support with financial questions as they arise throughout the year regarding budget submission, annual financial review, grants management, audit preparation, IRS reporting, and other general financial needs.

Office Staff:

- Should have people skills, computer skills, including SAIS, organization skills and at least one year experience in public school office work.