

# Procurement Laws Exception Amendment Request

## Charterholder Info

### Charter Holder

**Name:**  
Legacy Traditional School-  
Maricopa

**CTDS:**  
11-87-15-000

**Mailing Address:**  
3201 South Gilbert Road  
Chandler, AZ 85286  
> [View detailed info](#)

### Representative

**Name:**  
William Gregory

**Phone Number:**

## Downloads

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## Procurement Laws Exception


### Please Note

Charter operators granted an exception to local and state procurement regulations under A.R.S. §15-183(E)(6) are still required to satisfy the federal procurement requirements as a condition to the receipt of certain federal funds.

**This exception will not be granted to State Board of Education sponsored charter schools.**

## Attachments

Board Minutes –  [Download File](#)

Complete policy for procuring goods and services –  [Download File](#)

### Additional Information\*

No documents were uploaded.

## Signatures

Charter Representative Signature  
William Gregory 12/08/2014

# USFRCS Exception Amendment Request

## Charterholder Info

### Charter Holder

**Name:**  
Legacy Traditional School-  
Maricopa

**CTDS:**  
11-87-15-000

**Mailing Address:**  
3201 South Gilbert Road  
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### Representative

**Name:**  
William Gregory

**Phone Number:**

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## USFRCS Exception

All exceptions to the USFRCS will include:

Charter Holder must utilize Generally Accepted Accounting Principles


The Charter Holder is **NOT** exempt from filing the Annual Financial Report, the school report card data, annual auditing requirements, or any financial report request from the Arizona State Board of Charter Schools, the Auditor General, and the Arizona Department of Education

The Charter Holder is responsible for any "cross-walks" necessary to complete reporting requirements.

**This exception will not be granted to State Board of Education sponsored charter schools**

## Attachments

Board Minutes –  [Download File](#)

Complete policy for accounting –  [Download File](#)

### Additional Information\*

No documents were uploaded.

## Signatures

Charter Representative Signature  
William Gregory 12/08/2014



## Legacy Traditional School- Queen Creek Board Meeting Minutes

Date: December 5, 2014  
Start Time: 5:00pm  
Location: District Office: 3201 S. Gilbert Rd. Bldg. A., Chandler, AZ. 85286

### **Attendees:**

President: Nathan Schlink  
Vice President/Secretary: William Gregory  
Member: Cory Theobald  
Member: Jenni Ferrin

### **Other Attendees:**

Laura Gregory  
CAO: Bill Bressler  
CDO: Brandon Jones  
CFO: Corey Kennedy  
Exec. Asst: Stephanie Gofas

### **AGENDA**

- I. PLEDGE OF ALLEGIANCE
- II. CALL TO ORDER
  - Meeting called to order at 5:05pm
- III. ROLL CALL
  - Nathan Schlink called the roll and confirmed a quorum
- IV. UNFINISHED BUSINESS
  - None
- V. NEW BUSINESS
  - Adoption of Accounting Policy and Approval of Exception to USFRCS Amendment Form
    - Legacy Traditional School-Queen Creek wishes to adopt an Account Policy and file an Amendment with the Arizona State Board of Charter Schools to allow an exception to the Uniform System of Financial Records for Charter Schools (USFRCS).
      1. Motion to approve: Bill Gregory; Second: Cory Theobald
      2. Motion passed unanimously
  - Adoption of Procurement Policy and Approval of Exception to Procurement Amendment Form
    - Legacy Traditional School-Queen Creek wishes to adopt a Procurement Policy and file an Amendment with the Arizona State Board of Charter Schools to allow an exception to the procurement laws.
      1. Motion to approve: Bill Gregory; Second: Cory Theobald
      2. Motion passed unanimously
  - School Finance/Interschool Fund Transfers
    - Requesting board approval for interschool school fund transfers: Loans not to exceed a total of \$400,000 amongst the eight LTS schools.
      1. Motion to approve: Cory Theobald; Second: Nathan Schlink
      2. Motion passed unanimously
- VI. ANNOUNCEMENTS
  - None
- VII. ADJOURNMENT
  - Meeting adjourned at 6:55pm



## Legacy Traditional School- Queen Creek

### PROCUREMENT POLICY

Legacy Traditional School- Queen Creek will follow accounting policies and procedures that comply with generally accepted accounting principles (GAAP). Any procurement of goods and services shall be made by the procurement officer/authorized agent, in the best interest of the school, upon considering the totality of the circumstances surrounding the procurement, which may include but not be limited to, price, quality, availability, timelines, reputation and prior dealings.

Legacy Traditional School- Queen Creek shall not purchase any goods or services from any member of the governing board, an immediate family member of any member of the governing board nor from any entity in which any member of the governing board or an immediate family member of a governing board member may benefit from such a procurement, unless authorized by the governing board after a full disclosure of the potential benefits, and after the consideration set forth in paragraph 1 above.

Legacy Traditional School- Queen Creek understands that the policy cited above applies to purchases made using non-federal funds. As a condition of the receipt of certain federal funds, federal procurement requirements still apply.

Nathan Schlink, School Board President

12-5-14

Date



## Legacy Traditional School- Queen Creek

### ACCOUNTING POLICY

Legacy Traditional School- Queen Creek will follow accounting policies and procedures that comply with generally accepted accounting principles (GAAP). This includes using an accounting system that provides for the proper recording and reporting of financial data and following standard internal control procedures. The school will utilize a chart of accounts that has been developed to align with the chart of accounts found in the Uniform System of Financial Records for Charter Schools (USFRCS) for the purposes of complying with budgeting and annual financial reporting. Revisions will be made periodically for changes in laws, regulations and accounting pronouncements that cover charter school accounting, financial reporting and compliance with state and federal laws. requirements still apply.

Nathan Schlink, School Board President

12-5-14

Date