

Procurement Laws Exception Amendment Request

Charterholder Info

Charter Holder

Name:
Legacy Traditional School -
Surprise

CTDS:
00-00-00-000

Mailing Address:
3502 South Gilbert Road
Chandler, AZ 85286
> [View detailed info](#)

Representative

Name:
William Gregory

Phone Number:

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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.

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 05/22/2015



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MARICOPA CASA GRANDE QUEEN CREEK AVONDALE CHANDLER NW TUCSON LAVEEN GILBERT

Legacy Traditional School - Surprise PROCUREMENT POLICY

Legacy Traditional School - Surprise 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, timeliness, reputation, and prior dealings.

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

Nathan Schlink, School Board President

Date

USFRCS Exception Amendment Request

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Surprise

CTDS:
00-00-00-000

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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.

Attachments

Board Minutes –  [Download File](#)

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

Additional Information*

No documents were uploaded.

Signatures

Charter Representative Signature
William Gregory 05/22/2015



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MARICOPA CASA GRANDE QUEEN CREEK AVONDALE CHANDLER NW TUCSON LAVEEN GILBERT

Legacy Traditional School - Surprise ACCOUNTING POLICY

Legacy Traditional School - Surprise 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.

Nathan Schlink, School Board President

Date



Legacy Traditional School-Surprise Board Meeting Minutes

Date: February 6, 2015
Start Time: 5:00pm
Location: Gilbert Campus: 2747 S. Recker Road, Gilbert, Arizona 85295

Attendees:

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

Other Attendees:

Aaron Hale
COO: Teresa Tate
CFO: Corey Kennedy
CDO: Brandon Jones
Exec. Asst: Stephanie Gofas
Brittany Ayo
April Elison
Britney Daugherty
Linda Brasier

AGENDA

- I. PLEDGE OF ALLEGIANCE
- II. CALL TO ORDER
 - Meeting called to order at 5:15pm
- III. ROLL CALL
 - Nathan Schlink called the roll and confirmed a quorum; all members present
- IV. ANNOUNCEMENTS
 - LTS- Surprise has 600 students enrolled; 70 students in completion phase of enrollment
- V. REPORTS
 - None
- VI. UNFINISHED BUSINESS
 - None
- VII. NEW BUSINESS
 - Revised 15/16 SY Contract
 - Requesting board approval on the 15/16 SY employment contract
 1. Derek Samuel motioned to the 15/16 SY employment contract; Cory Theobald seconded the motion
 2. Motion passed unanimously
 - Adoption of Accounting Policy and Approval of Exception to USFRCS Amendment Form
 - Legacy Traditional School-Surprise 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-Surprise 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
- VIII. ADJOURNMENT
 - Meeting adjourned at 5:43pm