

Great Hearts Louisiana

Type 2 Charter Application for Great Hearts Lake Charles

**Submitted to Louisiana Department of Education
March 27, 2026**

EXECUTIVE SUMMARY

1. Mission and Vision. The mission of Great Hearts Lake Charles is to cultivate students' minds and hearts through the pursuit of truth, goodness, and beauty. We provide a rigorous, egalitarian education that prepares all students to think clearly, write coherently, and speak confidently. Our scholars graduate with significant academic accomplishment, but most importantly, our scholars graduate with the strong moral character to serve a lasting good beyond themselves. Ultimately, Great Hearts Lake Charles will graduate young people who are thoughtful leaders, articulate communicators, and compassionate citizens prepared to thrive in college, career, and civic life. Graduates will become leaders of character who pursue wisdom, act with integrity, and contribute to the common good, reflecting Louisiana R.S. 17:3972's goals of expanding high-quality choices, promoting equality of opportunity, and fostering innovation.

2. Anticipated Student Population and Educational Need. Great Hearts Lake Charles will be located in central Calcasieu Parish. In Year 1, we will enroll 312 students in grades K-3. We intend to grow one grade level per year, with a maximum enrollment of 112 students per grade level. At full capacity, we will serve approximately 1,500 students in grades K-12. We anticipate a student population that mirrors that of the Parish: ~63% economically disadvantaged, ~58% White, ~30% Black, 8% Hispanic, and 2% Asian. More than 10,000 district students attend schools rated "C," "D," or "F," representing 34% of all schools. The district's Assessment Indicator scores for K-8 (69.1, "C") and high school (68.8, "C") are also well below the state's "A" benchmark of 90, meaning that, on average, students are not yet demonstrating mastery of grade-level standards at levels necessary to ensure long-term success. This data indicates a clear need for a school like Great Hearts Lake Charles – one that can provide a well-rounded, rigorous, all-honors academic experience that equips students with the knowledge and character to excel in college, career, and civic life.

3. Education Plan. The Great Hearts educational model consists of five key components: Classical, Liberal Arts Curriculum: Great Hearts offers a rigorous curriculum that supports all students through a coherent sequence of courses. Math, science, foreign language, fine arts, and humanities exceed Louisiana state standards and meet Tier 1 criteria. Students engage with the great works – from Plato and Homer to Shakespeare, Jane Austen, and Frederick Douglass – while participating in theater, visual arts, music, and choir. Students study Latin or Ancient Greek as a foundation for modern languages and all high school students complete four years of math and four years of advanced lab science, ensuring strong preparation in STEM and the liberal arts. Great Hearts ensures all students, including those with exceptional needs and English learners, can fully access the curriculum through differentiated instruction, tailored supports, and specialized plans that foster critical thinking and academic success. Academy Ethos: Students are encouraged to create a community of scholarship, leadership and service in their classrooms, extracurricular activities, and their relationships with peers and teachers. An honor code that upholds academic integrity supports a consistent approach to moral formation.

Professional, Passionate, and Uniquely Qualified Faculty: Our teachers are subject-matter experts drawn from K-12, higher education, and professional fields. Their love of learning and deep disciplinary knowledge are central to our approach. Grounded in the Socratic method, teachers focus on eliciting students' ideas and critical thinking rather than simply transmitting information.

Visible Leadership: The Head of School of a Great Hearts academy is the primary instructional and cultural leader, modeling the virtues of the best teachers and administrators. The Head of School mentors and collaborates with teachers, providing continuous feedback, and exemplifying collegiality, fairness, clarity, responsibility, and a love of learning. The broader

leadership team and governing board bring extensive experience in managing and governing exceptional schools.

Family Involvement: Like students and teachers, the parents are encouraged to embrace and participate in the school's intellectual and moral vision. As the central role models and teachers in their own children's lives, parents can appreciate the significance of the school's vision and support their children in their journey towards it. Parent engagement, feedback and volunteerism are vital to the school's success.

4. Impact. Great Hearts Lake Charles adheres to Louisiana charter school law by providing a school option to “increase learning opportunities and access to quality education” for all students, while working to “encourage the use of different and innovative teaching methods, [and] educational models” through its classical liberal arts program and intentional school culture.¹ In Calcasieu Parish, one-third of schools are rated a “C” or lower and K–8 and high school Assessment Indicators remain below 70, indicating that many students are not yet college and career ready. In addition, only two schools offer a cohesive K-12 experience for families in CPSB, and no public schools currently offer a comprehensive classical education program, even though the K-12 model and the classical education model have a positive correlation to academic outcomes and positive school experience for all students.²³ Great Hearts Lake Charles directly addresses this need by offering a unique, proven K-12 academic program that provides all students the opportunity to engage in a rigorous, classical liberal arts curriculum that is content-rich and knowledge-building.

As Lake Charles strives to maintain its “development ready community” distinction, Great Hearts Lake Charles will work in conjunction with local business and economic priorities by providing families with a school option that emphasizes academic excellence, personal growth, college and workforce readiness and civic responsibility.⁴ This benefits the broader community by making Lake Charles an attractive site for business development and strengthens the long-term social and economic vitality of the Parish.

5. Great Hearts Louisiana has submitted two prior charter applications: (1) one for Great Hearts Harveston submitted to East Baton Rouge Public Schools on April 5, 2021, which was approved and is now in its third year of operation; and (2) a Type 1 application for Great Hearts Lake Charles submitted to the Calcasieu Parish School Board (CPSB) on October 20, 2025. The CPSB application received a “friendly denial” in January 2026. CPSB's evaluation indicated that the application met all rubric standards but that CPSB preferred the applicant pursue the Type 2 (BESE-authorized) route given CPSB's current strategic priorities.

The present application incorporates feedback from the Type 1 charter application evaluation and includes additional information based upon Great Hearts' ongoing experience operating Great Hearts Harveston in East Baton Rouge. Specifically, we have expanded our assessment narrative in response to CPSB feedback. We also incorporated updated family engagement data and community outreach outcomes, strengthened our Harveston performance narrative with 2024-25 growth data, and described Great Hearts Academic Improvement Plans for our accountability response. Since the prior application, no school leadership changes have occurred; one board member recently resigned (see response to question 27 for further detail).

¹ Louisiana State Legislature. (n.d.). *Louisiana Revised Statutes Title 17: Education, §3972: Purpose and intent*. Retrieved from <https://law.justia.com/codes/louisiana/revised-statutes/title-17/rs-17-3972/>

²Hanover Research. (2021, October). *Analysis of elementary and secondary grade span configurations* (Report prepared for XYZ Public Schools).

³McCoy, B. (2021, July). *Classical Education: An attractive school choice for parents* (Issue Brief). Manhattan Institute.

⁴ Babineaux, M. (2024, December 11). *Lake Charles named 'development ready community'*. KPLC.

EDUCATIONAL PROGRAM AND CAPACITY

School Establishment

6. a. Great Hearts Lake Charles proposes bringing a new K-12 school to Calcasieu Parish to continue the momentum the Calcasieu Parish School Board (CPSB) has built – and support the community in taking it to the next level. Great Hearts celebrates the gains local educators in CPSB have made over the past few years. Since 2021, CPSB has experienced consistent growth in enrollment, welcoming an additional 4,000 students to its schools.⁵ Since 2017, public schools across Louisiana have experienced an enrollment decline of over 41,000 students, yet Lake Charles is experiencing an influx, creating expanded demand for more high-quality schools in the community.⁶

At the same time, CPSB students have shown continual progress, earning the district an overall “B” grade in 2024 and outpacing the state average for grades 3-12 on the 2024-2025 LEAP assessment.⁷ While CPSB’s progress is real and applauded, there is still work to be done. There are 19 schools, representing over 30% of the parish, that have earned a “C” or “D” rating (see table below).⁸

Letter Grade	Number of Schools	% of Total
A	12	21.8 %
B	24	43.6 %
C	12	21.8 %
D	7	12.7 %

Looking more closely at student achievement data in CPSB, two specific needs arise. First, The district’s Assessment Indicator scores for K–8 (69.1, “C”) and high school (68.8, “C”) are also well below the state’s “A” benchmark of 90, meaning that, on average, students are not yet demonstrating mastery of grade-level standards at levels necessary to ensure long-term success. Approximately 40% of students across the district are performing at the Mastery+ level in all content areas.⁹ While this represents a two point gain from the previous year, it falls short of ensuring college and career readiness for the majority of students in the community. Great Hearts has a proven record of success opening high performing charter schools serving students similar to those in Lake Charles. By offering high-quality seats to families in Lake Charles and Calcasieu Parish, Great Hearts would contribute to the district's goal of ensuring more students achieve the state standard of Mastery+.

⁵Calcasieu Parish School Board. (2025, August 22). *Calcasieu Parish schools see largest enrollment growth in recent years*. <https://www.cpsb.org/news-page/news-details/~board/cpsb-news-feed/post/calcasieu-parish-schools-see-largest-enrollment-growth-in-recent-years>

⁶ Parlouisiana. (2024, August 19). *Back to school: Public school enrollment and demographics* [PDF]. <https://parlouisiana.org/wp-content/uploads/2024/08/Public-School-Enrollment-and-Demographics.pdf>

⁷Calcasieu Parish School Board. (2025, July 3). *Calcasieu Parish School Board one of top-growing districts in state LEAP performance*. <https://www.cpsb.org/news-page/news-details/~board/cpsb-news-feed/post/calcasieu-parish-school-board-one-of-top-growing-districts-in-state-leap-performance>

⁸ Louisiana Department of Education. (2024). *2024 school performance scores* [Excel file]. https://doe.louisiana.gov/docs/default-source/data-management/2024-school-performance-scores.xlsx?sfvrsn=d6160d73_4

⁹ American Press. (2025, July 7). *LEAP scores show Calcasieu one of the top growing academic districts in the state*. <https://americanpress.com/2025/07/07/leap-scores-show-calcasieu-one-of-the-top-growing-academic-districts-in-the-state/>

Another specific need is to address the disparities in achievement among specific subgroups of students. English Learners (approximately 3% of the student population) and Students with Disabilities (approximately 18% of the student population) are achieving Mastery+ at concerningly low rates and even underperforming the state average for Basic achievement in some grade levels and content areas.¹⁰ See the table below for more detail on current student achievement in CPSB based on LEAP 2024-2025 results for high school.¹¹

Subgroup	Exam	Calcasieu % Mastery	State % Mastery	Diff (Mastery)	Calcasieu % Basic	State % Basic	Diff (Basic)
English Learners	All Subjects	10	7	3	22	16	6
	Algebra I	24	13	11	20	16	4
	Biology	5	5	0	24	18	6
	Civics	5	5	0	19	13	6
	English I	12	5	7	12	14	-2
	English II	6	5	1	28	15	13
	Geometry	10	7	3	29	19	10
	U.S. History	10	5	5	32	16	16
Students with Disabilities	All Subjects	9	8	1	17	16	1
	Algebra I	15	12	3	19	15	4
	Biology	6	6	0	18	17	1
	Civics	5	6	-1	14	14	0
	English I	12	10	2	24	19	5
	English II	6	9	-3	17	15	2
	Geometry	5	5	0	16	15	1
	U.S. History	12	6	6	12	14	-2

The same is true at the K-8 level, as seen in the table of 4th grade and 8th grade results below.¹²

¹⁰Louisiana Department of Education. (2025). *Spring 2025 LEAP: State LEA achievement level summary* [Excel file].

<https://doe.louisiana.gov/docs/default-source/data-management/spring-2025-leap-2025-state-lea-achievement-level-summary.xlsx>

¹¹Louisiana Department of Education. (2025). *2025 State LEA & school LEAP high school achievement level summary (with subgroups)* [Excel file].

https://doe.louisiana.gov/docs/default-source/data-management/2025-state-lea-school-leap-high-school-achievement-level-summary-with-subgroups.xlsx?sfvrsn=c19ccc54_7

¹²Louisiana Department of Education. (2025). *2025 State LEA/school LEAP Grade 3–8 achievement level subgroup summary* [Excel file].

https://doe.louisiana.gov/docs/default-source/data-management/2025-state-lea-school-leap-grade-3-8-achievement-level-subgroup-summary.xlsx?sfvrsn=d4d8ec3c_7

Grade	Subgroup	Exam	Calcasieu % Mastery	State % Mastery	Diff (Mastery)	Calcasieu % Basic	State% Basic	Diff (Basic)
4	English Learner	All Subjects	6	8	-2	17	19	-2
		ELA	6	7	-1	15	20	-5
		Math	15	14	1	28	23	5
		Science	5	5	0	13	20	-7
		Social Studies	5	6	-1	13	15	-2
4	Students with Disabilities	All Subjects	18	14	4	26	21	5
		ELA	24	17	7	30	26	4
		Math	22	17	5	26	20	6
		Science	13	12	1	27	22	5
		Social Studies	15	12	3	20	16	4
8	English Learner	All Subjects	9	5	4	15	13	2
		ELA	7	5	2	18	16	2
		Math	15	5	10	11	12	-1
		Science	7	5	2	20	13	7
		Social Studies	7	5	2	9	12	-3
8	Students with Disabilities	All Subjects	13	9	4	20	17	3
		ELA	13	12	1	25	22	3
		Math	12	7	5	15	13	2
		Science	12	9	3	24	19	5
		Social Studies	13	10	3	15	14	1

Despite the growth CPSB has shown, there is still an urgent need for more high-quality schools. These gaps in Mastery+ achievement and progress for students with disabilities and English Learners are concerning. Coupled with the positive trend in student population growth, there is a clear demand for more quality seats in proven school models in the area, as many families are still without the option to send their child to a high-performing school. By partnering with parents and community stakeholders to offer our rigorous, proven, classical liberal arts education, Great Hearts Lake Charles can provide these quality seats for the families and students of Calcasieu

Parish. In addition, Lake Charles families currently lack a high-quality, open-enrollment classical option; our program offers college-prep rigor without tuition barriers.

b. Currently, there are no public classical school models available to families in Calcasieu Parish. In CPSB, the only comparable K-12 school models are Starks High School and Bell City High School. Both of these campuses have composite ACT scores above the Calcasieu Parish and state-wide average. Greats Hearts does not yet have a graduating class in Louisiana, but we have 14 fully built out K-12 campuses in Texas and Arizona. At those campuses, with a similar student population, our students have achieved a 24.8 average ACT composite score, well above the state and parish averages, and exceeding the Bell City and Starks averages by 5.1 points and 4.3 points, respectively. This represents a 15-20 percentile difference¹³ and is significant because the ACT college readiness benchmark is Eng 18, Math 22, Reading 22, Science 23; accordingly, a student with a composite score of 24.8 is more likely to be college ready than a student with a composite score of 19.7 or 20.5.¹⁴

This difference also impacts student eligibility for Louisiana TOPS scholarships. For TOPS, a composite score 20 is the floor for the Opportunity award, 23 for Performance, and 27 for Honors. So 24.8 generally qualifies for Performance; 20.5 qualifies for Opportunity; 19.7 is below the usual minimum.

The table below shows a full comparison of Average ACT Composite scores.¹⁵

School System	Site Name	2023-2024 Average ACT Composite Score
Louisiana Public School Students	State-Wide	18.4
Calcasieu Parish	Parish-Wide	19
Calcasieu Parish	Bell City High School	19.7
Calcasieu Parish	Starks High School	20.5
Great Hearts Academies	Arizona and Texas Campuses (14 Campuses)	24.8

A stark difference can also be seen in the cohort graduation rates at Bell City, Starks, and Great Hearts Texas and Arizona campuses. At Bell City, 59.6% of the most recent cohort earned an Advanced+Basic diploma, a marker below the state average. At Starks, 50% of the most recent cohort did the same. This represents achievement below both the state and parish average. In comparison, 91%-100% of Great Hearts Arizona and Great Hearts Texas students are earning at least a basic diploma in their state.

¹³ ACT. (n.d.). *National ranks & score percentiles*.

<https://www.act.org/content/act/en/products-and-services/the-act/scores/national-ranks.html>

¹⁴ ACT. (n.d.). *ACT Scores for Higher Education Professionals*.

<https://www.act.org/content/act/en/products-and-services/the-act-postsecondary-professionals/scores.html>

¹⁵ Louisiana Department of Education. (2024). *ACT scores — Class of 2024* [Excel file].

https://doe.louisiana.gov/docs/default-source/data-management/act-scores---class-of-2024.xlsx?sfvrsn=6b940bc6_3

School/School System Name	% of cohort earning Advanced+Basic credentials (>100)
Louisiana Statewide	61.6
Calcasieu Parish	57.4
Bell City High School	59.6
Starks High School	50
Great Hearts Arizona (11 Campuses)	91%-100% earn diploma
Great Hearts Texas (3 Campuses)	98%-100% earn diploma

We attribute the significant achievement of Great Hearts Academies graduating classes to the cumulative impact of the classical, liberal arts experience. The emphasis on knowledge-building, student discussion, and overall high academic expectations ensures that students are prepared for college and beyond, as indicated by the average ACT composite scores and graduation rates. This is the opportunity and experience Great Hearts Lake Charles will bring to Calcasieu Parish, providing families with a reliable school option that is not currently widely available.

Great Hearts Harveston, our East Baton Rouge campus, opened in Fall 2023 and currently serves students in grades K-9. The student population in East Baton Rouge has a greater number of economically disadvantaged students and English Learners than the student population of Lake Calcasieu.¹⁶ Yet when we compare the total population Mastery+ achievement across grades 4 and 8, we see Harveston student achievement near to or exceeding achievement at the other two campuses. In 4th grade math, Harveston students show significantly stronger achievement, with 61% of students earning Mastery+, compared to 45% and ~33% for Starks and Bell City. In 8th grade ELA, Mastery+ and Basic combined achievement is 83%, while at Bell City and Starks, it is 80% and 67%, respectively. This shows that, while the Mastery+ achievement is not yet where we want it to be, there is a strong foundation to build off. See the tables below for all comparison data.¹⁷

School Name	Grade 4 ELA Mastery+ %	Grade 4 ELA Basic %	Grade 4 Math Mastery+ %	Grade 4 Math Basic %
BELL CITY HIGH SCHOOL	59	29	45	28
STARKS HIGH SCHOOL	~33 ¹⁸	33	~33	42
GREAT HEARTS HARVESTON	50	28	61	28

¹⁶ Louisiana Department of Education. (n.d.). *School 017: Academic performance — breakdown by student groups*. Louisiana Schools. https://louisianaschools.com/schools/017/academic-performance/breakdown_student_groups

¹⁷ Louisiana Department of Education. (2025). *Spring 2025 LEAP: State, LEA & school achievement level summary* [Excel file]. https://doe.louisiana.gov/docs/default-source/data-management/spring-2025-leap-2025-state-lea-school-achievement-level-summary.xlsx?sfvrsn=b3de5bd5_7

¹⁸ The student data for the Advanced designation was <5%, so the Mastery+ value is estimated.

School Name	Grade 8 ELA Mastery+ %	Grade 8 ELA Basic %	Grade 8 Math Mastery+ %	Grade 8 Math Basic %
BELL CITY HIGH SCHOOL	51	29	~5	36
STARKS HIGH SCHOOL	28	39	~7	27
GREAT HEARTS HARVESTON	47	36	n/a	n/a

c. The Great Hearts model is directly aligned to supporting subgroups and achieving mastery through a focus on high academic expectations for all, a knowledge-building curriculum, student discussion, and intentional commitment to continuous improvement and support for Students with Disabilities and English Learners. The primary school program uses research-based, highly structured core literacy programs that are highly conducive to delivery in a diverse, open-enrollment setting and to adaptation for varying student needs. The secondary school program, with an emphasis on all students completing a rigorous core offering, dedication to Socratic seminars, and postsecondary preparation, is needed by families seeking to raise their children to be great-hearted leaders, free thinkers, and responsible citizens. Because Great Hearts' curriculum is tightly aligned vertically and horizontally, students and families have an attractive, progressive option that matches their development from early childhood through adolescence and young adulthood. In addition to the progress we see at Great Hearts Harveston, students at our established campuses in Arizona and Texas, including Students with Disabilities and English Learners, consistently outperform their peers at charter schools and traditional public schools in the state. See Section 9a and 9b for more data to support these results.

To meet the needs of students who are academically behind, Great Hearts provides targeted small-group instruction during the school day, before-school tutoring, and dedicated intervention blocks. These supports are designed to pre-teach essential concepts, clarify misconceptions from classwork, and close specific learning gaps. Math and reading interventionists use curriculum-aligned resources and real-time formative assessment data to customize instruction based on individual student performance. Intervention plans are regularly reviewed and revised to ensure they remain responsive to each student's progress.

Within the general education classroom, Great Hearts implements a push-in support model where specialists work alongside teachers to deliver just-in-time assistance. This model ensures students remain engaged with grade-level content while receiving immediate scaffolding as needed. Teachers use strategies such as contextualization, bridging, and fostering metacognitive skills to strengthen comprehension and long-term retention. Instructional teams closely monitor and document all interventions and use student data to refine their approaches, ensuring alignment with state standards and academic expectations.

This structured and responsive model – exemplified across the Great Hearts network – has led to significant academic growth among educationally disadvantaged students. Many students demonstrate more than a year of academic progress within a single school year, highlighting the effectiveness of Great Hearts' commitment to educational equity and excellence. See Section 9b for data on Great Hearts' record of results for Students with Disabilities and English Learners.

In establishing a Great Hearts campus in Lake Charles, we will directly fulfill R.S. 17:3972 by providing a school option to “increase learning opportunities and access to quality education” for all students, while working to “encourage the use of different and innovative teaching methods, [and] educational models” through its classical liberal arts program and intentional school culture.¹⁹ Great Hearts plans to meet and exceed all Louisiana statutory requirements and Department of Education guidelines related to class size, faculty qualifications, and student differentiation and support. In the early elementary grades, classrooms are staffed with a lead teacher and instructional aide instructing classes with an average size of 26 students and no more than 28. In the middle grades, class sizes become smaller to best support instruction by highly qualified lead teachers. In the high school grades, classes as small as 20 to 24 students support Socratic seminars, robust studies in multiple disciplines, and advanced coursework in calculus, the sciences, literature/social studies, and the arts. Great Hearts strives to create classroom environments that are close-knit and personalized, enabling every student to become confident and capable in frequently exercising his or her voice.

By partnering with parents and community stakeholders to offer our rigorous, proven classical liberal arts education, Great Hearts Lake Charles can provide high-quality seats for the families and students of Calcasieu Parish and help the community reach Louisiana’s 2025 goal of A-rated schools averaging Mastery, closing subgroup gaps, and expanding honors-level opportunities to all students. Lake Charles families currently lack a high-quality, open-enrollment classical option; our program offers college-prep rigor without tuition barriers

d. Great Hearts currently works with New Schools for Louisiana as a strategic advisor. Over the next year, Great Hearts Louisiana will seek partnership with McNeese State University for dual enrollment opportunities. We will also cultivate our existing relationships with members of Chamber Southwest Louisiana (Chamber SWLA) to provide internship opportunities and continued collaboration on the foundation for economic development in the parish. In alignment with our school model focus on history, the arts, and community, we will also seek to develop partnerships with local nonprofits including the 1911 Historic City Hall Arts & Cultural Center, The Children’s Museum of Southwest Louisiana, and the Louisiana Department of Wildlife and Fisheries Nature and Science Center. These partnerships can help reinforce the classical, liberal arts curriculum and provide enrichment programming for Great Hearts Lake Charles students.

7. a,b,c,d. Great Hearts Lake Charles will serve an intentionally diverse population of students across all demographics and subgroups. GHLC will be a home for students of all races and learning needs. In alignment with our focus on serving a truly diverse community of students, these anticipated demographics assume that GHLC’s student body will be representative of both the current enrollment in the CPSB. Our goal is for Great Hearts Lake Charles’s student population to mirror the parish within 5% variance across subgroups. Below is an overview of the anticipated student population demographics.

To ensure equity in our student population, GHLC will operate in accordance with Bulletin 126. We will maintain an open-enrollment admission process and implement a lottery system if enrollment interest is over capacity. We will ensure outreach to families is inclusive and intentional across the entire community. We will hold virtual and in-person enrollment events in a wide variety of settings to recruit families of all backgrounds and speak to our plans to serve students of all learning needs.

¹⁹ Louisiana State Legislature. (n.d.). *Louisiana Revised Statutes Title 17: Education, § 3972: Purpose and intent*. Retrieved from <https://law.justia.com/codes/louisiana/revised-statutes/title-17/rs-17-3972/>

Overview of Student Population									
	Total Pop.	Asian	Black	Hispanic	White	ELs	SwDs	ED	Homeless
Calcasieu Parish School Board	27,449 ²⁰	2% ²¹	30%	8%	56%	3%	18% ²²	63%	2.5% ²³
Great Hearts Lake Charles	1,456 ²⁴	4%	30%	10%	56%	1%	11.2%	61%	2.5%

8. a, b. Throughout the process of designing our Lake Charles campus, the Great Hearts leadership team continues to engage a broad group of professionals, community members, and families interested in enrolling to ensure our school will effectively meet the needs of the students and the community.

Family Engagement: In the summer of 2025, GHA launched a targeted marketing campaign to identify and engage interested families. This included two family engagement events in August at the Central Calcasieu Library and Event Space, in Central Lake Charles. During these events, approximately 20 families heard directly from Dr. Daniel Scoggin, Great Hearts' Academies Officer and Co-Founder, Genevieve Peterson, Great Hearts's Chief Development Officer, and Carley Hopkins, Great Hearts Harveston's Director of Community Engagement. They also had the opportunity to share comments and ask questions. On October 7th, 2025, Great Hearts hosted a virtual town hall for interested families in Lake Charles. Great Hearts also hosted two family engagement events in Lake Charles in January and March of 2026. Approximately 15 parents and community leaders attended. So far, over 200 residents have registered on the Great Hearts Lake Charles interest list. These efforts represent an intentional strategy to build a parent pipeline, educate the community about classical education, and maintain multiple touchpoints through in-person and virtual events.

Professional and Community Engagement: Over the course of the past year, the Great Lakes leadership team has cultivated relationships with key connectors in the Lake Charles community, including:

- **Dr. John Noble** - a retired physician and long-time Lake Charles resident with important relationships and influence in the community
- **Joshua Brown** - Director of the Governor's Program for Gifted Children at McNeese State University

²⁰Calcasieu Parish School Board. (2025, August 22). *Calcasieu Parish Schools See Largest Enrollment Growth in Recent Years*.

<https://www.cpsb.org/news-page/news-details/~board/cpsb-news-feed/post/calcasieu-parish-schools-see-largest-enrollment-growth-in-recent-years>

²¹ Data for Asian, Black, Hispanic, White, ELs, and Economically Disadvantaged subgroup comes from: Louisiana Department of Education. (2023, October). *Multi-stats (total by site and school system)* [Excel file].

https://doe.louisiana.gov/docs/default-source/data-management/oct-2023-multi-stats-%28total-by-site-and-school-system%29_web.xlsx

²²Calcasieu Parish School Board. (n.d.). *Department of Special Services*. Retrieved from

<https://www.cpsb.org/depts/special-education/department-of-special-services>

²³ Data for Calcasieu Parish was not available, so we have indicated the state-wide percentage of homeless students here. National Center for Homeless Education. (n.d.). *State profile*. Retrieved from <https://profiles.nche.seiservices.com/StateProfile.aspx>

²⁴ This is anticipated enrollment when we reach our full K-12 capacity. Year 1 enrollment is projected at 312 students in K-3.

- **Jim Rock** - Executive Director of the Lake Area Industry Alliance²⁵
- **Scott Walker** - President/CEO of the Southwest Louisiana Economic Development Alliance

Great Hearts has pursued a sustained and intentional engagement process in Lake Charles. Our leadership team has participated in several stakeholder engagement trips to the community to learn from and build partnerships with civic, business, and faith leaders. We have also hosted community leaders, including Dr. Noble, Joshua Brown, and Pastor Rose, at our Great Lakes Harveston campus. During these visits, leaders engaged in classroom walkthroughs and a Q&A with the Great Hearts leadership team. Across these efforts, Great Hearts has consistently sought to listen, build trust, and align its mission with the educational and economic priorities of the Lake Charles community, ensuring a strong foundation of local support and partnership. As of the submission of this application, over 200 families have registered interest in Great Hearts Lake Charles. We will continue to maintain ongoing communication with interested families through email campaigns, invitations to future events, and updates on the application process. We will also leverage partnerships with local churches, chambers, civic organizations to expand outreach to more families and daycares. Great Hearts also plans to continue 1-on-1 and small group meetings with community leaders to build a strong coalition of supporters.

See Appendix 1: Evidence of Community Support for more detail.

Academic Plan

9. a. Great Hearts' educational philosophy is grounded in six basic principles:

Philosophical pillars: Great Hearts believes that the world is ordered and knowable and that the human intellect can attain knowledge of reality through reason, hard work, and a program of study that is both coherent and specific. Great Hearts believe that education should proceed via shared inquiry and honest discussion and that thoughtful depth in a subject is preferable to broad or rapid coverage. In particular, we believe in the power of high expectations and that the greatest number of students benefit when the intellectual and ethical bar is set high in the classroom.²⁶

Unified Core Curriculum: For students to become culturally literate citizens, they must share certain knowledge based in the study of humanities, mathematics, the sciences, and the fine arts. Great Hearts gives students individualized attention, but within a common, compulsory one-track curriculum without the distractions posed by elective offerings. While students learn at different paces, true education is a matter of development over time within a stable learning community where peers are learning a shared body of knowledge, concepts and skills. Another advantage of a unified core curriculum is the potential for drawing cross-curricular connections and helping students develop a richer, more integrated understanding of subjects. This aligns directly to the science of reading research body that shows the correlation between knowledge building and schema and reading comprehension skills in all content areas.²⁷

²⁵ Lake Area Industry Alliance. (n.d.). *About us*. <https://laia.com/about/>

²⁶TNTP, Inc. (2024, August). *The impacts of teacher expectations on student outcomes: A practitioner's literature review*. <https://tntp.org/wp-content/uploads/2024/09/The-Impacts-of-Teacher-Expectations-on-Student-Outcomes-Literature-Review-2024.pdf>

²⁷ Wexler, N. (2023, October 10). *The science of reading isn't just phonics — but what else is it?* Forbes. Retrieved from <https://www.forbes.com/sites/nataliewexler/2023/10/10/the-science-of-reading-isnt-just-phonics-but-what-else-is-it/>

Liberal Arts Education: Children and teenagers have the capacity and desire to participate in all the liberal arts, including the sciences. They can participate in seminars at a high level. The primary grades are characterized not only by academic rigor and depth of study not often seen in the early years, but also by a student population that is engaged in a joyful and classical study of the liberal arts. The core curriculum exceeds the state standards in duration and content rigor.

Institutional Ethos Conducive to Strong Character Formation: Great Hearts places great value on the practice of virtue and leadership. As such, Great Hearts exhorts students to create a community of scholarship, leadership and service extending from their interactions with peers and teachers to extracurricular activities. Great Hearts teachers have diverse professional backgrounds, are uniquely trained to teach in a manner that is fundamentally Socratic in its approach to students, and fully embrace the Academy's vision of community, learning, leadership and service.

Solid, Sequenced, Specific & Shared: Rather than focusing on transitional ideas and fads, Great Hearts students study a lasting body of knowledge which has helped countless people throughout history engage with the great questions of life. The course framework clearly specifies what is important in language arts, history/geography, math, science, foreign language, and the fine arts. As they progress across grades, children learn new knowledge, concepts and skills that systemically build on what they already know and increase their long-term retention. The curriculum spirals systematically, enabling students to revisit ideas they have already learned, strengthening those lessons while enriching their understanding with new concepts, increased rigor, and greater complexity. A cohesive experience across content areas has been shown to improve academic performance, student engagement, and even equity across subgroups of students.²⁸

Socratic Method: Where it is advantageous to do so, courses are taught using the Socratic method, which develops thinking, speaking and reading skills. Students are actively involved in discovering truths rather than being informed through lectures in class or reading in textbooks. The teachers' responsibility is to create the right questions for discussion. Students find the answers with their reading and reflective activities. This approach supports students in building conceptual understanding, as well as the critical thinking and metacognitive skills needed for achievement for LEAP Mastery+ and the college and career reading that achievement represents.²⁹ This approach can also directly support the language development of English Language learners.³⁰

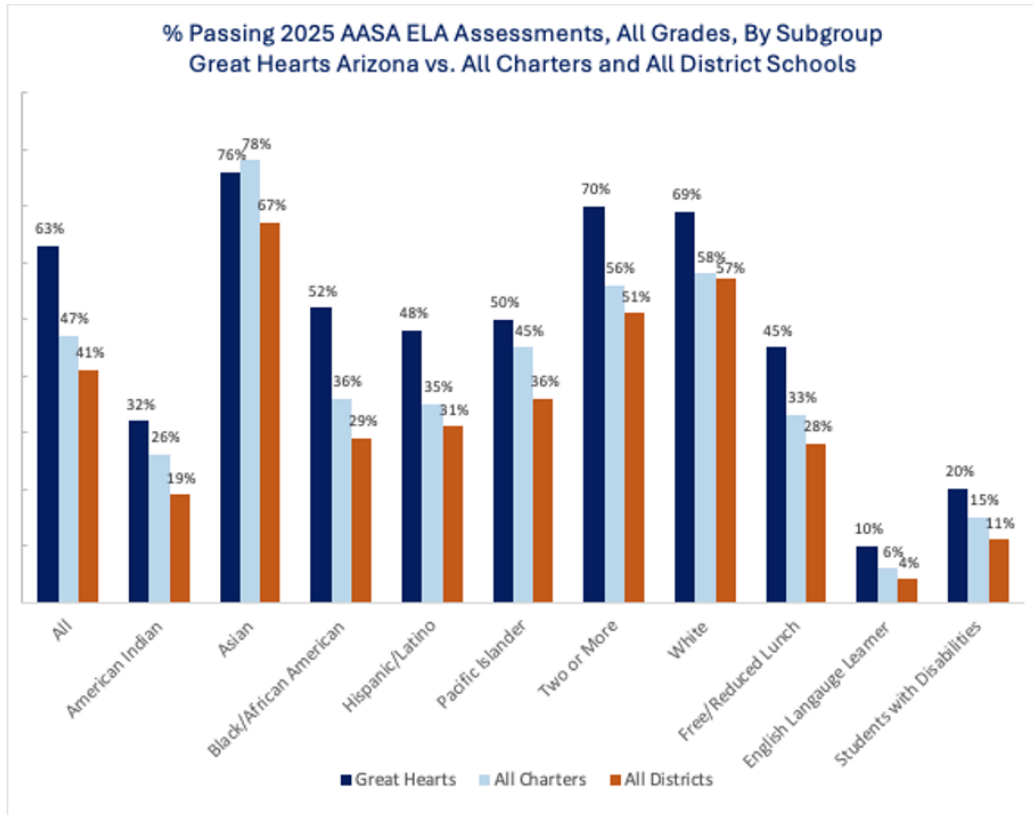
As part of opening our first Louisiana campus, Great Hearts Harveston, in 2023, our leadership team ensured the Great Hearts curriculum is aligned to Louisiana state standards and supports student achievement aligned to LEAP, ACT, Jump Start pathways, and graduation requirements.

In 2025, at our established campuses in Arizona, Great Hearts students, across all subgroups, outperformed their peers at other public charter and traditional charter schools across the state, in both ELA and Math. See the charts below for more details.

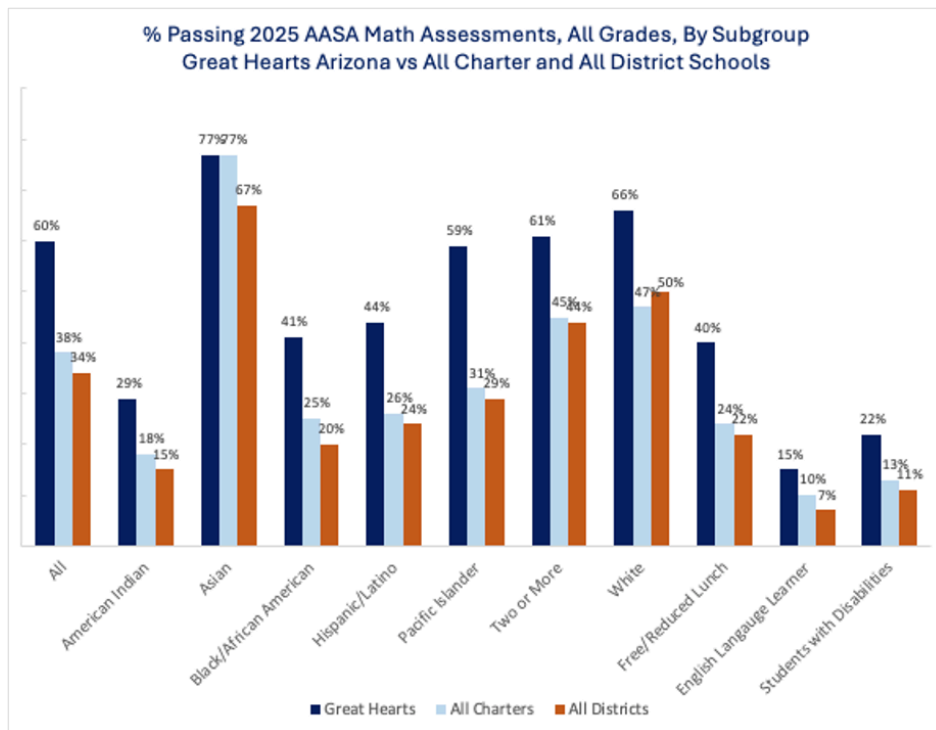
²⁸ Ghosh, S. S. (2025). Evaluating cross-curricular teaching frameworks: insights for the future of national curricula. *Education 3-13*, 53(7), 1127–1141. <https://doi.org/10.1080/03004279.2025.2511182>

²⁹ EdTech Books. (n.d.). *Socratic seminar* (Student Guide). Retrieved from https://edtechbooks.org/studentguide/socratic_seminar

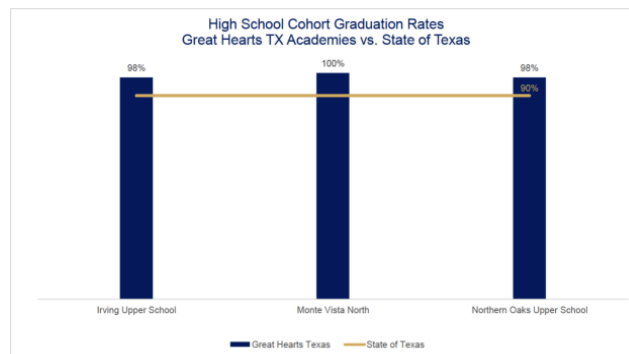
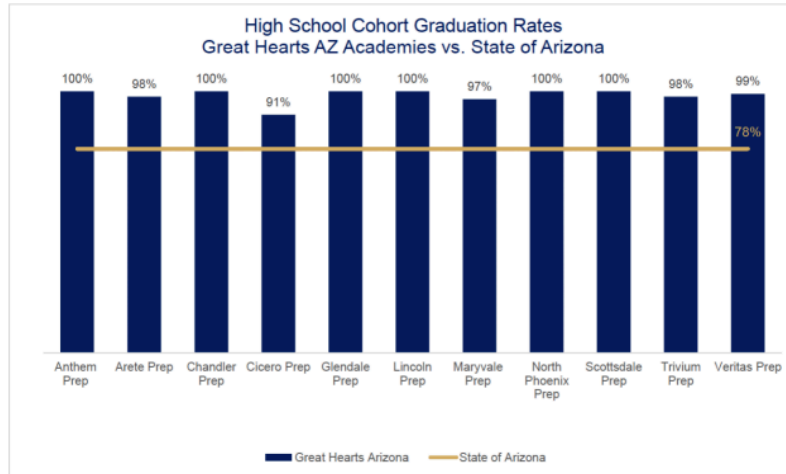
³⁰ Jensen, R. D., Jr. (2015, May). *The effectiveness of the Socratic method in developing critical thinking skills in English language learners* (ERIC Document ED557162). ERIC. <https://files.eric.ed.gov/fulltext/ED557162.pdf>



Also in 2025, Great Hearts students in Texas saw the same results in ELA, and for most subgroups in Math. See the charts below for more details.



In addition, in 2025 the Great Hearts model supported students in achieving high school graduation at higher levels than the state average at our established campuses in Arizona and Texas.



Students at Great Hearts Harveston are also well on their way to the levels of academic achievement we see at our fully-grown out campuses. See Section 6 for data that supports this.

An academic environment focused on knowledge-building, student discussion, and character education is what the students and families of Calcasieu Parish need to take them to the next level. Our instructional pillars will ensure increasing numbers of students build the skills necessary to achieve LEAP Mastery+, leading them to be the college and career-ready civic leaders the community wants and needs them to be.

b. Great Hearts is committed to ensuring that all students – including those who are educationally disadvantaged, students with disabilities, and English Learners – have equitable access to rigorous, state standards-aligned instruction. The Great Hearts instructional model, rooted in the classical liberal arts tradition, prepares students for success in college, career, and life by cultivating intellectual depth, moral character, and the habits of lifelong learning. Through the study of literature, mathematics, science, history, foreign language, art, and music, students learn to think critically, communicate effectively, and solve complex problems – skills directly

aligned with supporting more students to achieve LEAP Mastery+, and college and career readiness.

A central pillar of the Great Hearts approach, the Socratic method, immerses students in a vocabulary-rich environment that strengthens reading comprehension, analytical reasoning, and oral expression. This approach is particularly effective for Students with Disabilities and English Learners who may need additional language development or scaffolding, as it emphasizes discussion, evidence-based reasoning, and the articulation of coherent ideas. To ensure that every student can succeed in this all-honors environment, Great Hearts employs a structured system of academic supports that includes targeted small-group instruction, intervention blocks, and push-in services from specialists. Interventionists and general education teachers collaborate to provide real-time scaffolds while maintaining access to grade-level content. These supports are designed to pre-teach essential concepts, reinforce foundational skills, and close specific learning gaps, ensuring that students with disabilities and English Learners can engage fully with the rich classical curriculum. In this way, Great Hearts combines academic rigor with intentional inclusivity, ensuring that every student – regardless of background or need – is equipped to graduate as a clear thinker, coherent writer, and confident speaker, ready to excel in college and beyond.

Great Hearts Academies has a record of success supporting English Learners and Students with Disabilities. The tables below show the Great Hearts impact on academic performance for students in these subgroups. English Learners at our established Great Hearts campuses in Arizona and Texas achieve anywhere from 5% to 17% ahead of their peers in the state on ELA and Math assessments. Students with Disabilities at Great Hearts campuses achieve between 2% and 11% ahead of their peers in the state on these assessments.

Great Hearts Arizona Student Assessment Results Differential 2024–2025

Student Subgroup	ELA			Math		
	Great Hearts Arizona	Arizona State Ave.	Great Hearts Differential	Great Hearts Arizona	Arizona State Ave.	Great Hearts Differential
EL	10	4	+6	15	7	+8
SWD	20	11	+9	22	11	+11

Great Hearts Texas Student Assessment Results Differential 2024–2025

Student Subgroup	ELA			Math		
	Great Hearts Texas	Texas State Ave.	Great Hearts Differential	Great Hearts Texas	Texas State Ave.	Great Hearts Differential
EL	83	66	+17	76	68	+8
SWD	58	47	+11	48	46	+2

c. Great Hearts Lake Charles will maintain the same approach to academics, curriculum, and culture as our Harveston campus. One difference in the model is our enrollment growth plan. The Harveston campus opened as a K-7 campus in Year 1. We plan to open the Lake Charles campus with grades K-3 in Year 1, so we can focus on building our unique culture and academic program with a smaller group from the ground up. This will also allow us to focus on foundational literacy skills and knowledge-building to ensure students have strong reading comprehension as they move to fourth grade and beyond.

10. a,b. Great Hearts has been perfecting the design of its classical, liberal arts curriculum for two decades. Great Hearts' comprehensive core curriculum is balanced between English, history, science, mathematics, foreign language, the fine arts and physical education. In all of these subjects, the Great Hearts' team prioritizes curricula that meet three criteria:

- The curriculum materials are tried and tested across our 45 campuses. Over the last twenty years, tens of thousands of students have achieved academic success utilizing these curriculum materials. In our fully-grown campuses in Arizona and Texas, where students have been utilizing the curriculum materials year-over-year, Great Hearts student achievement consistently outperforms students at other charter schools and traditional public schools. (See Section 9a for data to support this).
- Our team has also mapped the Great Hearts curriculum materials to ensure they align to Louisiana state standards and the Tier 1 Non-Negotiable criteria and the Additional Criteria of Superior Quality found in the Instructional Materials Evaluation Tool for each content area.
- Standardized testing scores and the placement of graduates into excellent colleges and universities indicate that Great Hearts' approach leads to a high rate of success. The table below shows the accomplishments of our last six graduating classes across our fully grown out campuses.

Postsecondary Matriculation Measures	Class of 2019	Class of 2020	Class of 2021	Class of 2022	Class of 2023	Class of 2024	Class of 2025
Number of Graduates	498	555	689	729	756	736	783
Students Receiving Merit-Based Scholarships	80%	75%	74%	78%	72%	76%	65%
Total Value of Merit-Based Scholarships	\$41.1M	\$44.3M	\$58.9M	\$76.7M	\$56.6M	\$64.7M	\$77.1M
Average SAT Score	1267	1243	1237	1189	1270	1239	1210
SAT – Points Above National Average	+199	+175	+177	+129	+220	+215	+182
Average ACT Score (Composite)	27	28	27.2	26.5	24	24.8	24.6
ACT – Points Above National Average	+6	+7	+6.6	+6.2	+4.2	+5.4	+3.6
National Merit Finalists	5	11	9	10	9	11	11

The Great Hearts' team intentionally adapts and supplements its curriculum to provide all students with robust representations of their racial, ethnic, and cultural backgrounds without the perpetuation of stereotypes or deficit perspectives. As far back as the 1990's and 2000's, Great Hearts' primary school curricular framework, the Core Knowledge (CK) Sequence, has undergone successive rounds of revision to include works of literature, poetry, and speeches from scholars, leaders, and civilizations world-wide. The CK Sequence shines a bright light on heroic leaders throughout American history including slavery abolitionists, civil rights leaders, and other figures that courageously advocated for equal human, voting and legal rights. In the high school grades, students use Socratic seminars to read and discuss original texts, events and speeches from such leaders as Harriet Beacher Stowe, Frederick Douglas, Sojourner Truth, Harriet Tubman, Martin Luther King, Jr., Ralph Abernathy, Rosa Parks, Howard Thurman, and W.E.B. Dubois. This approach ensures a knowledge-rich environment that supports students' schema-building and reading comprehension, two key components to achieving LEAP Mastery+ and college and career readiness.

A central pillar of the Great Hearts approach is the Socratic method, which is especially effective in supporting students who may have had limited exposure to print-rich and knowledge-rich environments, or underdeveloped skills in reading and oral expression. In a Socratic classroom, students are immersed in a vocabulary-rich environment where they are encouraged to form coherent thoughts, articulate ideas, and engage deeply with core texts. This approach is reinforced by regular evaluation of reading comprehension, in-class coaching focused on understanding, and robust classroom discussion grounded in evidence from the text. Teachers dedicate time to coaching writing in response to readings, emphasizing grammar, vocabulary, argument structure, and stylistic development. Modeled read-alouds, embedded vocabulary instruction, and the use of graphic and content organizers further support comprehension and content mastery.

Because Socratic Inquiry is an instructional strategy which allows teachers to constantly assess individual levels of comprehension and respond with questions tailored to student needs, it allows for lively and engaged classroom interactions. By focusing on the depth and quality of student understanding rather than superficial metrics like memorization of facts, the teacher is able to guide all students to accessible agreements, using these agreements as the framework upon which individual student understanding is built. This instructional practice ensures high expectations and adequate, rigorous practice for all students, leading to the higher levels of achievement on state assessments and ACT that Great Hearts academy has seen across all subgroups of students at our established campuses.

A description of each core content areas follows:

English: Students in kindergarten through 5th grades study direct reading and literature; grammar and composition; Spalding phonics, spelling and penmanship. The Spalding method is a well-established multi-sensory phonics and writing program that has proven to yield high literacy in primary grades.

The program begins with formation of letters via dictated instruction, along with the relationship between sounds and letters, which leads to mastering the standard English spelling system. By focusing on phonics instruction, completing it quickly and making it multi-sensory to address multiple learning styles, children rapidly begin to spell, write and read with understanding. Furthermore, students engage with accessible texts to refine their decoding, fluency, and comprehension skills.

As a complete language arts method, Spalding helps children master phonics, letter formation, alphabetic principle, letter-sound awareness, correct spelling, fluent reading, oral/print comprehension, vocabulary, pronunciation, and auditory-visual-verbal motor cognitive development. Spalding is designed to be supplemented by vocabulary-rich literature, which is provided by the Great Hearts Core Reading List.

This program of literature exposes young readers to great writing and develops their ability to discuss it – guided by the teacher – to analyze what they read, express their ideas effectively through speaking and listening to others, and evaluate others' ideas with civility. To teach students grammar and writing composition, Great Hearts integrates Writing with Ease, First Language Lessons, and in grades 3-5, Well Ordered Language.

In middle school (6th through 8th grades), students will engage a full credit every year of Literature and Composition which includes grammar instruction, continuing to progress along the Great Hearts Core Reading List, and writing instruction. In 9th through 12th grades, all students will take Humane Letters, a full-year course that focuses on the American tradition in 9th grade, Modern Europe in 10th grade, and the Ancient World in 11th grade. In the 12th grade capstone year, Human Letters culminates with a senior thesis, which consists of a deep study of three works of literature or philosophy, an analytical paper 15-20 pages in length, and an oral defense before a panel of teachers.

Mathematics: Students take six years of Singapore mathematics, which emphasizes various approaches and mechanisms for solving problems, including manipulatives, and learning how to articulate mathematical concepts as well as apply them. “In kindergarten, students enter Singapore K, and all fifth-grade students will have completed Singapore 5. In 6th through 8th grades, mathematics builds on the Singapore program and progresses from Foundations of Mathematics in 6th grade, through Pre-Algebra in 7th grade, and into Algebra I in 8th grade. The Algebra I course is a high school level course and is offered for high school credit. In 9th through 12th grades, all students will take Euclidean Geometry (9th grade), Algebra II and Trigonometry (10th grade), Honors Precalculus I (11th grade), and AP Calculus A/B.

History: In the primary grades, students take American history, world history, and geography through the Core Knowledge History Curriculum. American history is emphasized at every grade level, along with a different global emphasis in world history and geography in each grade. The lesson sequences are spiraled so that students are verifying and reinforcing concepts that they previously learned before moving on to explore and learn more advanced, age-appropriate concepts. In 6th through 8th grades, there is one history course each year focusing on a particular era: World History in 6th grade, American History in 7th grade, and Louisiana History in 8th grade. In high school, history is integrated into the full-year Human Letters courses to support interdisciplinary studies that broaden students' exploration of how civilizations, cultural trends, and artistic genres develop apart from and in relation to one another.

Science: The Core Knowledge science curriculum is a hands-on experience for students in grades K-5. Students actively engage in qualitative and quantitative observations, measuring, counting, and collecting while learning about a variety of topics, including plants, animals, insects, habitats, weather, matter, physical change, elements, compounds, light, sound and electricity. In 6th through 8th grades, Science is taken every year: Life Science in 6th grade, Physical Science in 7th grade, and Earth Science in 8th grade. In 9th through 12th grades, all students will take Biology (9th grade), Chemistry (10th grade), Physics I (11th grade), and AP Physics II (12th grade).

All Great Hearts schools use the Great Hearts curriculum which is made up of a course scope and sequence used across our network. These courses are structured by a rigorous set of standards across all grade levels and content areas. All instruction at Great Hearts Lake Charles will be designed using the Louisiana Student Standards as a minimum bar of rigor and guided by our normed network standards. Within these parameters, schools have the autonomy to choose from high quality materials that the network makes available to them. All materials used by Great Hearts teachers meet, as a minimum, the Tier 1 non-negotiable criteria outlined in the LDOE Instructional Materials Evaluation Tool.

You can find samples of texts used across our network, and a complete list of curriculum, below.

Great Hearts Kindergarten-5th Grade Core Reading List

Kindergarten: Little Bear • Mouse Soup • Mike Mulligan • The Velveteen Rabbit • Mr. Popper's Penguins • Little Bear's Visit • Father Bear Comes Home • Grasshopper on the Road

1st Grade: Owl at Home • Frog and Toad Collection • A Bargain for Frances • Sam the Minuteman • My Father's Dragon • The Bears on Hemlock Mountain • George the Drummer Boy • The Tale of Peter Rabbit • Keep the Lights Burning, Abbie • Bedtime for Frances

2nd Grade: Boxcar Children • Charlotte's Web • Little House in the Big Woods • Cricket in Times Square • Sarah, Plain and Tall • The Courage of Sarah Noble • The Hundred Dresses • Elmer and the Dragon • The Dragons of Blueland • The Borrowers

3rd Grade: The Little House on the Prairie • The Lion, the Witch, and the Wardrobe • Pinocchio • Trumpet of the Swan • The Little Prince • The Real Thief • The Moffats • The Horse and his Boy • Stuart Little • Paddle to the Sea • Bambi • Alice's Adventures in Wonderland

4th Grade: Prince Caspian • Carry on, Mr. Bowditch • The Princess and the Goblin • The Adventures of Robin Hood • Wizard of Oz • King Arthur and His Knights of the Round Table • Pollyanna • Peter Pan • The Silver Chair • Island of the Blue Dolphins • Farmer Boy • Bud, Not Buddy

5th Grade: The Voyage of the Dawn Treader • Where the Red Fern Grows • Secret Garden • Across Five Aprils • The Jungle Book • The Phantom Tollbooth • A Wrinkle in Time • The Wise Woman • The Magician's Nephew • My Side of the Mountain • Little Women • Through the Looking Glass

Great Hearts 6th-8th Grade Core Reading List

6th Grade:

Full Length Narratives: Shane • The Wind in the Willows • Anne of Green Gables • The Adventures of Tom Sawyer • A Comedy of Errors • Midsummer Night's Dream • The Giver • Johnny Tremain • The Last Battle • The Hobbit

Short Stories: "Rikki Tikki Tavi" • "The Monkey's Paw" • "The Gift of the Magi" • "A Sound of Thunder" • "The Lady or the Tiger?" • "Ransom of Red Chief" • "The Most Dangerous Game" • "All Summer and a Day"

Poetry: Sonnets 18, 29, 73, 143 by William Shakespeare • "If" by Kipling • "The Village Blacksmith" by Longfellow • "First Fig" by Millay • "Nothing Gold Can Stay" by Frost • "My heart leaps up" by Wordsworth • "The Tyger" by Blake • "Hope' is the thing with feathers" by Dickinson • "There is no frigate like a book" by Dickinson

7th Grade:

Full Length Narratives: Call of the Wild • A Christmas Carol • Julius Caesar • Tales of the Greek Heroes • Miracle Worker • The Pearl • Great Expectations • 20,000 Leagues Under the Sea • Fahrenheit 451 • Count of Monte Cristo • Treasure Island • Dr. Jekyll and Mr. Hyde • Cyrano de Bergerac

Short Stories: “Tell-Tale Heart” • “The Black Cat” • “The Casque of Amontillado” • “The Pit and the Pendulum” • “Fall of the House of Usher” • “The Necklace” • “Secret Life of Walter Mitty” • “To Build a Fire”

Poetry: Sonnet 15 by William Shakespeare • “How Do I Love Thee” by Browning • “On His Blindness” by Milton • “Loveliest of Trees, the Cherry Now” by Housman • “When I Was One and Twenty” by Housman • “Spring and Fall” by Hopkins • “Stopping by Woods on a Snowy Evening” by Frost • “The Arrow and the Song” by Longfellow • “Concord Hymn” by Emerson • “A Red, Red Rose” by Burns • “The Charge of the Light Brigade” by Tennyson

8th Grade:

Full Length Narratives: Beowulf • To Kill a Mockingbird • Lord of the Flies • Sir Gawain and the Green Knight • The Merchant of Venice • The Chosen • All Quiet on the Western Front • The Good Earth • The Sword and the Stone • King Arthur: Tales from the Round Table • Watership Down

Short Stories: “Prologue” from Chaucer’s Canterbury Tales • “Knight’s Tale” • “The Sergeant-at-Law’s Tale” • “The Nun’s Priest’s Tale” • “The Oxford Scholar’s Tale” • “The Franklin’s Tale” • “The Friar’s Tale” • “The Doctor of Medicine’s Tale” • “The Squire’s Tale”

Poetry: Sonnets 30 and 60 by William Shakespeare • “Death Be Not Proud” by Donne • “Virtue” by Herbert • “Pied Beauty” by Hopkins • “She Walks in Beauty” by Byron • “To Autumn” by Keats • “O Captain, My Captain” by Whitman • “When You Are Old” by Yeats

9th-12th Grade Core Reading List

9th Grade:

Great Books: The Adventures of Huckleberry Finn • My Antonia • The Great Gatsby • Autobiography of an American Slave • “Civil Disobedience” • Democracy in America • Othello • The Tempest • The Scarlet Letter • Of Mice and Men • The Crucible • Our Town • Red Badge of Courage • Old Man and the Sea • Billy Budd • The Souls of Black Folk • Walden • Emerson’s Essays

Historical Works: The Declaration of Independence • The Constitution of the United States • Federalist Papers #10, #39, #51, #84 • Marbury v. Madison • The Monroe Doctrine • Seneca Falls Declaration of Sentiments and Resolutions • Dred Scott v. Sanford • The Emancipation Proclamation, Abraham Lincoln • The Gettysburg Address, Abraham Lincoln • Plessy v. Ferguson • Booker T. Washington’s “Atlanta Compromise” • Du Bois’ “The Talented Tenth” • “Of Mr. Booker T. Washington and Others” • Fourteen Points Speech, Woodrow Wilson • First Inaugural Address, Franklin D. Roosevelt • Brown v. Board of Education • “Letter from Birmingham Jail”, M.L. King • “I Have a Dream”, M. L. King •

Short Stories: Franklin, “Alice Addertongue” • Hawthorne, “Young Goodman Brown” • Hawthorne, “The Birthmark” • Melville, “Bartleby the Scrivener” • Twain, “Journalism in Tennessee” • Twain, “The Private History of a Campaign that Failed” • Crane, “The Bride Comes

to Yellow Sky” • Crane, “The Open Boat” • Jewett, “A White Heron” • Bierce, “A Horseman in the Sky” • Bierce, “An Occurrence at Owl Creek Bridge” • Wilkins Freeman, “A New England Nun” • James, “The Real Thing” • Chopin, “A Pair of Silk Stockings” • Cather, “A Wagner Matinee”

10th Grade:

Great Books: Second Treatise of Government • Pride and Prejudice • Discourse on Inequality • Tale of Two Cities • Communist Manifesto • Crime and Punishment • Henry V • Frankenstein • Henry IV • Utopia • One Day in the Life of Ivan Denisovich

11th Grade:

Great Books: Iliad • Odyssey • Selections from History of the Peloponnesian War • Histories • Herodotus • Antigone • Oedipus Rex • Euthyphro • Meno • Crito • Apology • Phaedo • Laches • Gorgias • Republic • Nichomachean Ethics • Genesis, Exodus, Job • Hamlet • Agamemnon • Libation Bearers • Eumenides • Oedipus at Colonus • Poetics, Aristotle • Plutarch’s Lycurgus • Plutarch’s Solon • Plutarch’s Cato • On Tranquility, Seneca • On the Shortness of Life, Seneca • On Providence, Seneca • On Duties, Cicero • Psalms, Proverbs, 1/2 Samuel, 1/2 Kings

12th Grade:

Great Books: Aeneid • Confessions • Matthew • Mark • Luke • John • Romans • “Treatise on Law” • The Divine Comedy • The Prince • Meditations on First Philosophy • Discourse on Method • The Brothers Karamazov • King Lear • Macbeth • Protagoras • Meditations on First Philosophy • Reason in History • Paradise Lost • Montaigne’s Essays

Grades	ELA Curriculum Selection	Alignment with LDE Tier System
K-2	<ul style="list-style-type: none"> ● Writing Resource: Great Hearts Lower School Writing Guide ● Grammar: First Language Lessons ● <i>Writing with Ease</i> (Bauer) ● Phonics and Penmanship: <i>Spalding</i> ● Poetry: Great Hearts Poetry List and Core Knowledge "Sayings List" ● Literature: Great Hearts Core Reading List 	Not rated: meets, at a minimum, Tier 1 non-negotiable criteria outlined in the LDE Instructional Materials Evaluation Tool
3-5	<ul style="list-style-type: none"> ● Writing Resource: Great Hearts Lower School Writing Guide ● Grammar: Well-Ordered Language ● <i>Writing with Ease & Writing With Skill</i> (Bauer) ● Vocabulary: <i>English from the Roots Up</i> ● Phonics and Penmanship: <i>Spalding</i> ● Poetry: Great Hearts Poetry List and Core Knowledge "Sayings List" ● Literature: Great Hearts Core Reading List 	
6-8	<ul style="list-style-type: none"> ● Composition: Great Hearts Writing Manual ● Grammar: Warriner's Grammar and Composition ● Literature: Great Hearts Core Reading List 	

9-12	<ul style="list-style-type: none"> ● Composition: Great Hearts Writing Manual ● Literature: Great Hearts Core Reading List 	
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Grades	Math Curriculum Selection	Alignment with LDE Tier System
K-5	<ul style="list-style-type: none"> ● Singapore Mathematics, Primary Mathematics 2022 	Not rated: meets, at a minimum, Tier 1 non-negotiable criteria outlined in the LDE Instructional Materials Evaluation Tool
6-8	<ul style="list-style-type: none"> ● G6: Dolciani Mathematics Structure and Method Book I ● G7: Dolciani Mathematics Structure and Method Book II ● G8: Dolciani Algebra Structure and Method 	
9-12	<ul style="list-style-type: none"> ● G9: Euclid's <i>Elements</i> ● G10: Dolciani, Algebra and Trigonometry ● G11 and G12: Thomas' <i>Calculus</i> 	

Grades	Science Curriculum Selection	Alignment with LDE Tier System
K-5	<ul style="list-style-type: none"> ● Core Knowledge Science Sequence 	Not rated: meets, at a minimum, Tier 1 non-negotiable criteria outlined in the LDE Instructional Materials Evaluation Tool
6-8	<ul style="list-style-type: none"> ● G6: Great Heart Life Science Manual ● G7: Holt Science & Technology "Mini Courses" (<i>Introduction to Matter; Interactions of Matter; Forces, Motions, and Energy; Electricity and Magnetism; Sound and Light</i>) ● G8: <i>Earth Science</i> (Holt Science & Technology) 	
9-12	<ul style="list-style-type: none"> ● G9: <i>Modern Biology, 1st Edition</i> (J.H. Postlethwait and J.L. Hopson, Holt, Rinehart, and Winston) ● G10: <i>Chemistry: The Central Science</i> (Brown, LeMay, Bursten and Murphy) ● G11 and G12: <i>Physics: Principles with Applications</i> (Douglas C. Giancoli) 	

Grades	Social Studies Curriculum Selection(s)	Alignment with LDE Tier System
K-5	<ul style="list-style-type: none"> ● Core Knowledge History Sequence 	Tier 1
6-8	<ul style="list-style-type: none"> ● G6: <i>The United States a Brief Narrative History</i> (Hullar, Link, and Scott Nelson) ● G7 and G8: <i>The Western Experience</i> (M. Chambers) 	Not rated: meets, at a minimum, Tier 1 non-negotiable criteria outlined in the LDE Instructional Materials Evaluation Tool
9-12	<ul style="list-style-type: none"> ● G9: <i>America: A Narrative History</i> (G. Tindall and D. Shi), <i>American History and Literature: A Reader</i> (Great Hearts Supplement) ● G10: <i>The Western Heritage</i> (D.. Kagan et al.) ● G11: <i>The Histories</i> (Herodotus), <i>History of the Peloponnesian War</i> (Thucydides) 	

10. c. Great Hearts will offer a variety of additional classes and courses to students to enhance their overall educational experience. Offerings will include:

Foreign Languages: The Latin language curriculum is an immersion-based multi-year elementary program. In 6th through 8th grades, students take Latin every year as their foreign language offering. In 9th through 12th grades, students have the choice of further study in classical languages (Latin IV and V in 9th and 10th grades, and Greek I and II in 11th and 12th grades), or the choice of a modern language for all four years (French I-IV or Spanish I-IV).

Fine Arts: In kindergarten through 5th grades, students take six years including choral music and studio art at all grade levels. The emphasis is on introducing students to master artists and their works in art and music, with different time periods and cultures featured at appropriate grade levels. The curriculum is supplemental with activities and hands-on experiences beyond lessons, which are designed to enhance students' understanding and appreciation for the material covered in the courses. In 6th through 8th grades the fine arts are semester courses – each year, students take a semester of Music (performance and theory) and Studio Art. In 9th through 12th grades, students continue to take semester courses including Music, Studio Art, and Drama.

11. a,b,c,d,e,f. Great Hearts has developed a completely new plan for Great Hearts Distance Learning (GHDL), which would be applied in response to the ongoing or future pandemics, instances of flooding or hurricanes where students cannot safely travel to school, or similar situations that may prohibit from students traveling to or being in-person safely. In the instance that Great Hearts must enact the use of its Distance Learning plan, all students will have a computer device provided by Great Hearts. Students will be enrolled in courses and taught by teachers from their own academy with regular video contact. In some cases, distance learning students will be consolidated into full sections. In other cases, students will be in a blended section with in-building peers.

During hybrid learning, lower school students will experience lessons and video contact with their teacher every day, and upper school students will have three lessons on average with each classroom teacher per week, including both synchronous and asynchronous video. Humane Letters seminars will take place for all high school students. Participation in these activities will be required for student attendance. Zoom tutoring will be available, and students will be assessed every week and held to the same academic standards as their in-building peers.

Distance learning students will learn the same subjects and take the same courses as they would in person. They will receive instruction that is equivalent, but not identical: lessons delivered by teachers may be over live video or may be pre-recorded; lessons and tests may be shorter and more frequent than in the classroom; independent student activity may be unsupervised rather than under the watchful eye of the teacher. While distance learning students will progress through the curriculum at a similar pace to their in-building peers and reach the same endpoint, they may spend less time on some topics and more time on others to ensure that the most essential knowledge and skills are mastered for future years.

All students will have a daily program of regular, structured school in which they must participate. Some will be live, synchronous Zoom video classes, lessons, and activities which take place at scheduled, regular times. Daily engagement through Google Classroom will be required. The GHDL model will not be one of independent work with occasional teacher interaction; it will be one of regular online instruction and contact with teachers and peers at

their school supported by independent work. The new GHDL is not homeschooling; it is, rather, school at home.

Students will be responsible for daily work and teachers will actively assess student progress. Discrete grades and scores will be given for activities, assignments, and assessments; there will be no “pass/fail” grading at the end of the quarter or semester. Tracking student progress will be led by daily attendance and engagement tracking and the assessment strategy will be implemented both online and in person for comparison and intervention.

All special population students with individual plans and accommodations will have their related services met remotely both through asynchronous and synchronous instruction, creative scheduling and progress monitoring, all based on state and federal law. Furthermore, every campus will have a plan to reach out to families who are absent and will seek to re-engage families and meet their unique needs.

During hybrid learning, Great Hearts will provide accommodations for students with disabilities as outlined in their Individual Accommodation Plans (IAPs) and Individualized Education Programs (IEPs). These accommodations are implemented through collaboration and sharing of plans between general education teachers and special population staff through their individual lesson planning, lesson delivery, and monitoring, to meet each individual student's needs. In addition to their regular classroom schedule, small group and individual sessions are offered through the Google classrooms, Zoom and individual office hours for those requiring additional support.

It is not enough for distance learning students to be academically engaged in school. Opportunities are also present for social and emotional engagement with teachers and peers. Part of this will be satisfied by daily, synchronous video lessons and classes, but schools will also create new forms of online community to keep students connected to each other and to their school. Class celebrations, themed social events, school assemblies, and other activities will be created to complement the new plan for distance learning.

All faculty attend orientation and training annually, and LEAP 2025 alignment and curriculum internalization will be a regular aspect of professional development and training, which extends to the Great Hearts Lake Charles model. Finally, to assess the effectiveness of hybrid learning, Great Hearts will track daily key metrics related to engagement, attendance, parent satisfaction, and other key measures. Regular reflection and debrief meetings of staff will gather feedback and make adjustments. Also, criterion and norm- referenced assessment data will help Great Hearts track, intervene, and improve the program.

Central to remote learning is the interaction between grade-level teachers and students facilitated by the Canvas learning management system (LMS), which may be the most advanced, reliable and user-friendly central hub available. Over the past 10+ years, Canvas has been tested and refined in hundreds of educational environments. Because of its robust design and capabilities, Canvas functions as both an LMS and a content management system (CMS), which simplifies the interface for all users. Canvas contains an incredible array of features and integrates seamlessly with other tools, such as Google Classroom and Zoom, which Great Hearts finds essential to delivering a high-quality education. All teachers receive technical and instructional training in Canvas and the other tools that Great Hearts uses during summer full-day trainings and throughout the year. Great Hearts employs qualified technical engineers and content designers to train and assist teachers in developing lessons throughout the academic year.

Academic Goals

12. a,b,c. Great Hearts Lake Charles has set ambitious – but realistic - goals for its first five years of operation. We are also aware that the Louisiana School Performance Score calculation goes into effect this year – 2025-2026. Upon the completion of this school year, Great Hearts will take into account the impact of the updated accountability model on school performance scores and may adjust our goals accordingly. However, we expect our goals for absolute performance on LEAP 2025 to remain consistent.

Performance	Baseline (CPSB 2025 District Score)	Year 1 2027-2028	Year 2 2028-2029	Year 3 2029-2030	Year 4 2030-2031	Year 5 2031-2032
School Performance Score (Letter Grade)	87.5 (B)	88 (B)	89 (B)	90 (A)	92 (A)	95 (A)

3-8 LEAP 2025 - Mastery+	Baseline (CPSB 2025)	Year 1 2027-2028	Year 2 2028-2029	Year 3 2029-2030	Year 4 2030-2031	Year 5 2031-2032
All Subjects Average	35%	35%	38%	42%	46%	51%
All Subjects Subgroup: Economically Disadvantaged	28%	30%	32%	34%	36%	38%
All Subjects Subgroup: Students with Disabilities	23%	24%	25%	26%	27%	28%
All Subjects Subgroup: English Learners	18%	19%	20%	21%	22%	23%
ELA	49%	50%	54%	58%	62%	66%
Math	41%	43%	46%	49%	52%	55%
Science	22%	25%	28%	31%	34%	37%
Social Studies	27%	30%	33%	36%	39%	42%

Great Hearts Lake Charles will not have a high school graduating class until 2036-2037, which will be Year 10 of operation, and thus is contingent on the school being awarded a charter renewal. Though this academic performance data will not be utilized when determining the school's performance score or in consideration when determining its initial charter renewal, Great Hearts has a goal of a 100% graduation rate, and will ensure that all high school students are on track to graduate at the culmination of their fourth year of high school.

Baseline Data Collection and Ongoing Data Plan. Great Hearts Lake Charles will establish baseline data within the first 30 days of the school year using a multi-measure screener battery: DIBELS (Dynamic Indicators of Basic Early Literacy Skills) for foundational reading skills in grades K–5; NWEA MAP benchmark assessments in ELA and Math for grades 2–9; Singapore Math foundational fluency checks and Foundations literacy screener for K–1; and the English Language Proficiency Screener (ELPS) for all newly enrolled English Learners within 30 days of enrollment, as required by state law. In accordance with R.S. 17:3911, Great Hearts Lake Charles will administer all state-required assessments including LEAP 2025 (grades 3–9), NAEP, and applicable alternate assessments for students with disabilities. Internally, MAP benchmark assessments will be administered three times per year (fall, winter, spring), and DIBELS progress monitoring will occur at a minimum monthly for students identified for Tier 2 or Tier 3 reading intervention.

Data Analysis and the Data-to-Instruction Feedback Loop. Great Hearts Lake Charles will use a structured MTSS (Multi-Tiered System of Supports) framework as the backbone of its data analysis and instructional response process. The MTSS Coordinator and campus leadership will lead monthly data team meetings at which teachers, interventionists, and instructional coaches review MAP, DIBELS, and curriculum-based assessment results to: (1) identify students falling below grade-level benchmarks by subgroup; (2) confirm or adjust Tier 1, 2, or 3 placement for each identified student; and (3) set or revise individualized academic growth targets. For students receiving targeted or intensive interventions, progress will be monitored bi-weekly using curriculum-based measures and reviewed against individual growth targets. MTSS data review meetings will be held every four to six weeks to assess intervention effectiveness and make real-time adjustments to the type, duration, and intensity of support. A quarterly Steering Committee review—modeled on the formal process documented in the Great Hearts Academic Improvement Plans—will evaluate whole-school and subgroup performance trends and recommend programmatic or PD adjustments.

Student Performance Goals and Goal-Setting Process. At the start of each year, teachers will work with their Head of School and the MTSS Coordinator to develop Student Learning Targets (SLTs) for each class that are aligned to LEAP 2025 proficiency bands and MAP normative growth expectations. SLTs will identify: current performance baseline (BOY MAP/DIBELS score or prior LEAP score); the measurable end-of-year growth target; and the interim milestones at which progress will be evaluated. SLTs will be documented and tracked through the network’s instructional coaching platform. School-level goals will be reported annually to the charter board and updated based on mid-year data review.

d. Great Hearts is committed to hiring and retaining distinguished faculty members, not only those with the intellectual and pedagogical capacity to be master teachers but those committed to educating all students and serving as virtuous role models in every way. Teachers arrive from a broad array of cultural backgrounds, and therefore, receive specific training to create a welcoming and uplifting classroom for every learner. All professional development, described below, is directly tied to the findings of the data analysis cycle described above.

When teachers join Great Hearts for their first year, they receive 2.5 weeks of intensive onboarding and training at a network-wide summer institute. The first days are often described as ‘drinking from a firehose’ as incoming teachers learn about the culture of the organization and the elevated sense of purpose in Great Hearts academies. Approximately 95 percent of teachers report, after those first several days, “I am inspired and feel like I signed up to work for the right place.” In later days, teachers drill down into the specific expectations of classroom instruction and culture before completing curriculum training specific to their teaching

assignments. After coming together for a network-wide summer institute, they return to their campuses to receive more training and meet with their grade-level or department leadership for practical tools to continue their planning and preparation.

Academy leaders take a short-cycle feedback approach to teacher observation and coaching. Most school leaders are in a teacher's classroom every 1-2 weeks observing a class and providing feedback resulting in practical improvement before the next observation. This short-cycle approach allows the teacher to improve incrementally while maintaining high accountability. Teachers report satisfaction with this approach.

Teachers actively collaborate with their peers to plan lessons in addition to being part of a larger network of teachers and drawing from a wide range of resources. Teacher professional development occurs on-campus weekly and monthly in ways that are intimate and responsive to particular school needs.

Professional development also happens at a regional and national level through discipline-specific workshops and lectures that leverage the scale of the network to bring in high-quality resources and speakers. Teacher in-services are often practical, but they also cater to their intellectual interests. In the course of a year, they may hear a lecture on the nature of historic inquiry, read a Great Book together, or attend a concert or play together as life-long learners. The goal of all these shared experiences is to create a place for consistent improvement and development of the teacher – whether they stay in the classroom or move to school leadership. On average, established Great Hearts schools retain approximately 85 percent of faculty each year – a higher rate than comparable public schools.

Teachers also receive training to ensure that they celebrate diverse voices that reflect the pluralism across the tradition. A key part of this exposure is fostering an awareness of the role of liberal arts education for figures such as Martin Luther King Jr., Frederic Douglass, and others. Teachers receive practical training on serving all students with proper respect and dignity and attending to the unique needs that students have when entering the classroom. Special training will be provided so that teachers build awareness and cultural competency tools to make sure students who come from a background different than their own are respected and cultural differences bridged to the best of the teacher's ability and the academy capacity. This awareness includes taking every student on their own individual terms while providing all students with the support needed to flourish in our program.

School leaders will be responsible for coaching teachers and setting the tone early in the academy's life to understand and engage the community. The role of the parent organization will be crucial in equipping school staff with the needed perspective to embrace the surrounding community and build productive partnerships between faculty and parents to support children's health, well-being, and quality of education.

At the heart of Socratic Inquiry is the art of crafting and posing subject-appropriate questions which develop students' ability to listen, think critically, and respond thoughtfully to their peers. All Great Hearts teachers are continuously immersed in this model; new faculty receive three weeks of intensive district-level training in Socratic Inquiry and other supporting strategies at the beginning of their tenure, eventually joining veteran faculty for site-based and network-sponsored in-service training throughout the academic year, both of which provide further opportunities for honing the craft. Through this training, teachers learn that a lesson with well-executed Socratic Inquiry begins with how it is planned. Teachers learn the skill of backwards planning – starting the process by clarifying "big questions" about the topic to be

studied and working backward from those big ideas to produce cogent Socratic questions which form the core of each lesson.

Another important part of the Great Hearts teacher training is to maximize the use of class time. Teachers learn to structure the day beginning with bell work, progressing through the core of the lesson content, and finishing with a lesson wrap up that often includes an exit ticket. In addition to careful lesson planning, teachers implement clear classroom procedures and routines for taking attendance, getting the attention of the class, distributing materials, and transitioning between activities. The Great Hearts Teacher Playbook outlines effective strategies, many of which are taken from “Love and Logic” or “Teach Like a Champion” best practices, for implementing these procedures and routines. School-level instructional coaching provided throughout the year ensures consistency and efficiency by helping teachers to understand how adhering to our recommended “visible structures” will improve their instruction.

Louisiana Accountability System: Academic Performance

13. a,b,c. As a collective, Great Hearts Academies, with over 30,000 students in kindergarten through 12th grades, has achieved strong results on state assessments and in high school graduation rates. The data provided in the Overview Template shows that students at 36 of our 45 campuses are outperforming their peers across the state in state testing for ELA and Math. All of the Great Hearts campuses that are fully enrolled K-12 have a HS Cohort Graduation rate higher than the state where they are located.

Great Hearts Harveston (GHH), located in East Baton Rouge Parish, is Great Hearts Louisiana’s only current Louisiana campus. GHH is in its third year of operation (2023-24 was Year 1) and currently serves students in grades K-9. In 2024-25, GHH served approximately 539 students (52% Minority, 64.7% Economically Disadvantaged, 3.3% English Learners) and received a School Performance Score (SPS) of C and a Progress Index rating of C. As a school in its second year of formal state accountability evaluation, these scores reflect expected start-up variance.

We have identified two areas of focus based on current student achievement data that does not yet meet the requirements outlined in Bulletin 126:

- Increasing performance in ELA at our Harveston campus to meet and exceed the state average
- Continuing and accelerating support for Students with Disabilities and English Learners, as these subgroups of students lag behind our school proficiency rates in ELA and Math.

Great Hearts Louisiana submits this application under the belief that GHH’s structured Academic Improvement Plans, described in 13.d, below, and the strong multi-year outcomes of GHA’s 44 out-of-state campuses, described in 13.e, below, collectively demonstrate the operator’s capacity to open, operate, and continuously improve high-quality schools.

d. When necessary, Great Hearts Academies schools adopt Academic Improvement Plans to remedy performance deficiencies and track subsequent progress. For example, in response to current SPS performance, Great Hearts Harveston adopted a Lower School and Upper School Academic Improvement Plans (AIPs) for the 2025-26 school year. In alignment with the Great Hearts Academic Improvement Framework, each plan identifies 3 – 5 core priority areas for improvement, names measurable goals for each priority, and details a clear action plan for achieving these goals, including owners and metrics of success. For GHH, key remediation strategies include: (1) structured small-group reading and writing intervention blocks; (2)

expanded co-teaching models for inclusion classrooms; (3) enhanced EL scaffolding aligned to the Core Knowledge curriculum; (4) weekly data team meetings tied to formative assessment cycles; and (5) professional development focused on literacy and SWD-specific instructional practices. The AIPs include quarterly monitoring benchmarks and clear accountability structures for progress review by school and network leadership. Progress on AIP targets will be shared with GHH's board and with BESE as part of the ongoing accountability relationship. Based on AIP interventions currently underway and our experience implementing similar AIPs across the country, we project Great Hearts Harveston will achieve a B letter grade by 2026-27.

e. Great Hearts Academies believes in a long-term commitment to our classical liberal arts curriculum and the evidence base linking key components such as knowledge-building, student discussion, and character education to academic achievement. Great Hearts' 44 out-of-state campuses in Arizona and Texas demonstrate that the model produces strong, sustained results once fully established. Campuses with 5+ years of operation consistently outperform district and state averages in ELA and math, often achieving proficiency rates of 70–85% in established schools. Additionally, the Great Hearts Academies that have been in operation for 10 or more years show consistently stronger results in academic achievement for students with disabilities and English Learners – and significantly smaller gaps between the achievement of these subgroups of students and overall student achievement at each campus. Great Hearts Lake Charles will benefit from codified systems, experienced CMO leadership, and the operational and academic lessons of the GHH launch—all of which reduce start-up risk and position GHLC for earlier and stronger academic outcomes than were achievable at GHH. This data supports the durability and scalability of the Great Hearts model as student success increases with their exposure to our rigorous curriculum and instructional supports year-over-year.

Assessments

14. a,b,c,d,e. Great Hearts conducts consistent, ongoing assessments to measure student achievement and progress throughout the year. Since students still inevitably have learning gaps, Great Hearts schools supplement its strong curriculum with the use of the proven systems of NWEA's MAP benchmark system and DIBELS to monitor individual student achievement and growth. Through site-based and network-level professional development, teachers and school leaders are taught to analyze formative assessment and benchmark data to inform and adjust full class instruction practices to provide additional support for students who require it.

At the end of each quarter, each student's academic progress will be thoroughly evaluated, and a formal report will be posted for the family. Once a year, a longer narrative semester evaluation will be emailed home or posted where it is accessible to the family. One required parent teacher conference will be held each year. Students do not attend these conferences.

A liberal arts education requires a special kind of evaluation – one that offers a narrative account of the student's development in depth of inquiry, sense of wonder, specific areas of mastery, needs for improvement, and dispositions toward learning and others. The narrative evaluation is much more meaningful than the assignment of a single letter grade or a percentage.

Below, the chart provides an outline of the various state assessments that will be administered across grades PreK-12 as appropriate. Parents/guardians will be notified of the dates of administration of these tests, which take place in the spring. Under Louisiana law, there is no right of opt-out from mandatory assessments required in all public schools.

Grade Level	Assessment(s)	Design	Rationale
PreK*	GOLD	Formative assessment administered periodically	Combines: (a) observation of areas of learning & development; with (b) completion of tasks predictive of numeracy & literacy readiness.
K Entry	GOLD	Formative assessment administered periodically	Combines: (a) observation of areas of learning & development; with (b) completion of tasks predictive of numeracy & literacy readiness.
K-3 Literacy	DIBELS	Benchmark test in fall, winter & spring	Uses fluency measures to regularly assess & monitor acquisition of early literacy skills.
	Morrison McCall	Reliable scaled assessment with 8 normed tests	Monitor progress in developing grade-level skills in phonics & spelling.
3-8	LEAP 2025	Updated Louisiana Educational Assessment Program	Assesses student proficiency in state grade-level concepts & skills in ELA, Math, Social Studies & Science. Practice tests available to gauge progress towards spring summative tests.
	LEAP Connect	Accommodates students with IEPs	Assesses student proficiency in state grade-level concepts in ELA & Math in a manner that supports individual-student accommodations.
	NWEA MAP NAEP	Nationally normed, computer-adaptive benchmark assessment	Monitors progress learning grade-level concepts & skills relative to national norms & predictive of state standards. Administered across all Great Hearts Academies.
9-12	LEAP 2025	Assess proficiency & monitor progress in fall, spring & summer	Assesses students' achievement levels in English I & II, Algebra I, Geometry, U.S. History & Biology.
	LEAP Connect	Accommodates students with IEPs	Assesses students' achievement levels in English, Math & Science. Administered in grade 11 & grade 12 as necessary.
	NWEA MAP	Nationally normed, computer-adaptive benchmark assessment	Administered to Great Hearts students in grades 9-10 to monitor progress learning grade-level concepts & skills relative to national norms & predictive of state standards. May be administered in grade 11 as helpful to augment state testing.

	PSAT/NMSQT	Practice version of SAT	Administered once per year in grades 9- 11 to all Great Hearts students to assess student skills in reading, math & writing relative to a national cross-section of their peers. Used to qualify students as National Merit Finalists.
	ACT/SAT	Achievement & college entrance eligibility	Administered in grade 11 to assess student skills in reading, math & writing relative to a national cross-section of their peers. Used by many colleges & universities to determine admission & remedial course needs.
	Work Keys, Advanced Placement (AP) & College-Level Examination Program (CLEP)	As required & appropriate	Work Keys assess workplace readiness skills that can affect job performance. AP are college-level exams in specific subjects. The CLEP provides 34 exams that cover college-level course material & can determine eligibility to receive college credits.
ELL K-12	English Language Proficiency Test (ELPT)	As needed & required	Assesses the English-language proficiency of students who meet participation criteria for English Learners (ELs) from grades K-12.

In addition, Great Hearts will consider participating in LEAP 360, an optional, free assessment system that allows student learning to be measured at the beginning, middle, and end of each academic year. LEAP 360 can be administered in a manner that allows it to be used as a diagnostic, interim, and K-2 formative assessment. A related instructional resource, called EAGLE, may be used to provide teachers with sample questions so that student learning is aligned with state assessments and content standards.

For its own internal assessment of student growth and educational effectiveness, Great Hearts will administer other formative assessments at different points in the year. The results of these tests do not have a bearing upon student grades. No individual students' test scores will be released to any third parties.

- Internal Assessments. For its own internal assessment of student growth and educational effectiveness, Great Hearts will administer assessments at various points in the year. These assessments include Singapore math (K-5) and grade level content exams. Each assessment is aligned to academic expectations and student outcomes in core content classes.
- External Assessments. Great Hearts will use NWEA MAP grades 3-12 and Amplify DIBELS K-3. Data gathered from these assessments will be used to inform student progress and identify areas in need of academic support and intervention. Student growth and progress will be measured from beginning of year to end of year.
- State Assessments. Students will be assessed according to state requirements. All tests will be conducted during the school year according to the state testing schedule. These include the state achievement assessment LEAP 2025 for 3rd through 12th grade students and ACT for high school students.

- Formative Assessments. Formative assessment types will include, but are not limited to, exit tickets, key word outlines, papers, quizzes, exams, projects, verbally summarizing key takeaways, and active participation in Socratic discussions. Students with disabilities will receive accommodations or modifications based on their IEP or 504 Plan. Formative assessments will be used internally to assess student growth, educational effectiveness, and to make the correct judgment about this specific student in this specific class.

Great Hearts teachers use data and inputs from frequent formative, authentic and standardized assessments to gauge what students are learning, design continuing assignments, guide the preparation of lessons, and make instructional decisions that result in course corrections and adjustments in scope and sequence throughout the academic year. Teachers meet as grade-level teams and with on-site instructional administrators during weekly professional development periods so that they can make adjustments on a daily, weekly, and monthly basis. These adjustments occur under the oversight of Great Hearts' central curriculum and instruction team, which includes a Vice President of Curriculum and five-person administrative team. Rather than dictating curriculum and scope and sequence centrally, Great Hearts' team utilizes a "train the trainers" model to identify exemplary faculty members and equip them to deliver structured professional development presentations and extend support to teachers at each campus.

Students found to need academic support, as evidenced by a progress report, may be referred to tutoring. Students will have ready access to tutoring and a variety of other supports.

When a student falls into the D or F range for a course, a special progress report will be officially emailed or posted for the parents/guardians. Teachers will also call parents when students encounter academic challenges, reaching out both to inform parents of the student's difficulties and to discuss plans regarding

Providing access to a classical education to students with disabilities is central to Great Hearts' philosophy of education, which seeks to enrich the lives of all children. Great Hearts believes that the unnecessary removal or compartmentalizing of any student because of special needs would result in an impoverished experience for the entire class. As such, Great Hearts includes students with disabilities to the maximum extent possible in general classroom mediums while supporting their development of strategies and skills through specialized instruction. Great Hearts has established policies, procedures, and best practices in supporting Special Populations and students who are at risk and the most vulnerable. Great Hearts programs and services are aligned with state and federal laws and are designed to allow every student the opportunity for success and ensure a Free Appropriate Public Education (FAPE) for all students. Great Hearts' inclusive approach to the liberal arts education allows for all students to achieve at their highest potential.

Struggling Students

Great Hearts Academies is committed to supporting all students, especially those who face academic or behavioral challenges, through a comprehensive Multi-Tiered System of Supports (MTSS). This framework ensures early identification and intervention for struggling learners using a tiered approach grounded in high-quality instruction, universal screening, and data-informed decision-making. Students are identified for support through benchmark assessments such as DIBELS and NWEA MAP. These tools, administered multiple times throughout the year, help monitor student progress and determine the appropriate level of intervention.

Struggling learners are those whose academic performance or behavioral development significantly lags behind grade-level expectations. These students may demonstrate challenges in foundational skills, cognitive functioning, social adjustment, or engagement with learning. When data indicates a need for support, students are placed into one of three tiers. Tier 1 includes rigorous, differentiated instruction provided to all students in the general education classroom. Tier 2 offers targeted small-group interventions during designated blocks such as Lyceum or the reading block, using evidence-based intervention programs. Tier 3 provides intensive, individualized support for students who do not respond adequately to Tier 2 interventions, with daily instruction led by trained interventionists and monitored through frequent progress checks.

Students are placed into intervention groups based on multiple data points, including benchmark scores, classroom assessments, teacher observations, and attendance or behavioral records. For example, students scoring below the 30th percentile on NWEA MAP or demonstrating consistent underperformance on classroom assessments may receive 60 minutes or more of weekly intervention. In early grades, students not progressing toward reading proficiency by third grade receive additional support and are monitored closely using DIBELS progress monitoring assessments.

Quarterly MTSS meetings and administrative data reviews ensure that interventions are effective and equitable. These reviews assess whether students are responding to interventions and whether any subgroups are disproportionately represented in Tier 2 or Tier 3, signaling a need to adjust Tier 1 instruction or identification practices.

In alignment with Louisiana's Individual Academic Support Plan (IASP) requirements, students in grades K–5 who score below proficiency on literacy or numeracy screeners—or below Mastery on LEAP assessments—receive targeted academic support through high-dosage tutoring embedded within the school day. Through the Great Hearts model of intervention, there are already periods built into the day that facilitate opportunity for IASP students to receive high-dosage tutoring at least three times per week in small groups of no more than four students, led by trained personnel using LDOE-approved materials.

If students continue to struggle despite Tier 3 support, they may be referred to the School Building Level Committee (SBLC). The SBLC is a general education decision-making team composed of administrators, teachers, interventionists, parents, and other relevant professionals. It reviews all data collected during Tiers 1, 2, and 3—including benchmark scores, classroom assessments, attendance, behavior records, and intervention progress—to determine next steps. These may include refining the current intervention plan, initiating a Section 504 evaluation, or referring the student for a comprehensive evaluation to determine eligibility for special education services under the Individuals with Disabilities Education Improvement Act (IDEA 2004). Throughout this process, parents are treated as equal partners and are invited to participate in meetings, share insights, and support implementation of strategies at home.

Parent involvement is essential at every stage. Great Hearts encourages families to reach out proactively if they have concerns, and staff members are committed to responding within 24 hours. Families are informed of their child's intervention placement, progress, and goals, and are invited to participate in SBLC meetings and support learning at home. By maintaining a collaborative, data-informed approach, Great Hearts ensures that students receive the support they need to access the curriculum and grow intellectually and morally.

To track the efficacy and equity of the RTI process at Great Hearts, administrators and

interventionists meet quarterly to review data to make two determinations:

- Are the majority of students responding to their interventions, signaling the effectiveness of the programming?
- Are any student subgroups over-represented throughout the school and grade levels, signaling an inequitable implementation of Tier 1 universal instruction, intervention, and identification.

Great Hearts' three-tiered model is as follows:

Tier 1: High-Quality Classroom Instruction, Screening, and Group Interventions. Within Tier 1, all students receive high-quality and rigorous instruction provided by qualified personnel to ensure that their difficulties are not due to inadequate instruction. All students are screened on a periodic basis to establish an academic and behavioral baseline and to identify struggling learners who need additional support.

Students identified as being “at risk” through universal screenings, such as NWEA MAP assessments, and/or results on state- or district-wide tests receive supplemental instruction during the school day in the regular classroom. The length of time for this step generally should not exceed 8 weeks. During that time, student progress is closely monitored using a validated screening system such as curriculum-based measurements. At the end of this period, students showing significant progress are generally returned to the regular classroom program. Students not showing adequate progress are moved to Tier 2.

Tier 2: Targeted Interventions. In the primary and middle school grades, Great Hearts implements research-based programs to enable students to develop strong core literacy skills, including Spalding Reading, Singapore Mathematics and the Core Knowledge Sequence. These programs use explicit, sequential methods to enable students to learn reading through phonics, learn mathematics concepts in progressive fashion, and read age-appropriate texts that build concept and knowledge mastery in a spiraling fashion that reinforces mastery. Students not making adequate progress in the regular classroom in Tier 1 are provided with increasingly intensive instruction. Intensity varies across group size, frequency and duration of intervention, and level of training of the professionals providing instruction or intervention. These services and interventions are provided in small-group settings in addition to instruction in the general curriculum. In the early grades (kindergarten through 3rd grade), interventions are usually in the areas of reading and math. A longer period of time may be required for this tier, but it should generally not exceed a grading period. Students who continue to show too little progress at this level of intervention are then considered for more intensive interventions as part of Tier 3.

Tier 3: Intensive Interventions and Comprehensive Evaluation. At this level, students receive individualized, intensive interventions that target the students' skill deficits. Students who do not achieve the desired level of progress in response to these targeted interventions are then referred for a comprehensive evaluation and considered for eligibility for special education services under the Individuals with Disabilities Education Improvement Act of 2004 (IDEA 2004). The data collected during Tiers 1, 2, and 3 are included and used to make the eligibility decision, support and future improvement, including how the parent can assist. Teachers and other school staff may also contact parents via phone and email to determine if additional supports, inside or outside of the classroom, may benefit the student as well. Great Hearts also encourages parents and guardians to reach out and contact their child's teachers if they have any concerns or if they believe their child may be having difficulty. Teachers and staff members are available via email or phone, and will always respond to parents within 24 hours.

Diverse Learners and Student Supports

15. Great Hearts provides a continuum of services and supports through differentiation of instruction for all Special Populations including students with disabilities, English Learners, and at-risk students, while providing a challenging, rich, and rigorous curriculum. In Special Education and Section 504, the specialized teams develop Individual Education Plans (IEPs) and Individual Learning Plans (ILPs) that meet the needs of students with disabilities.

Students with Disabilities: Great Hearts ensures that testing and evaluation procedures and materials, which are utilized for the purposes of evaluation and placement of students with disabilities, are selected in compliance with Bulletin 1508 and administered so as to not be racially, culturally, or gender discriminatory. Assessment and procedures are provided and administered in the student's native language and/or most proficient mode of communication and in the form most likely to yield accurate information on what the student knows and can do academically, developmentally, and functionally, unless it is clearly not feasible to do so. Upon completion of the evaluation, if the student is found eligible for Special Education and related services, Great Hearts convenes an initial IEP team meeting for each eligible student with a disability and for each student for whom an evaluation for special education services is conducted. The IEP Team committee is:

1. The group that interprets the evaluation and determines the child's educational needs;
2. The group that develops the IEP; and
3. The group that determines the educational placement of the child.

The IEP Team includes at least the following members:

1. The parent/legal guardian of the child
2. An individual qualified to interpret the results of evaluations
3. An officially designated representative of the school who can speak to the school's educational program
4. A special education teacher
5. At least one general education teacher

Great Hearts ensures that all members of the IEP team have the opportunity to participate in a collaborative manner in developing and implementing the IEP. The IEP team must consider the following: (1) the strengths of the child; (2) the concerns of the parents for enhancing the education of their child; (3) the results of the initial or most recent evaluation of the child; and (4) the academic, developmental, and functional needs of the child.

The IEP team must determine needed special education and related services, the creation and implementation of an Individualized Learning Plan (ILP), and necessary program modifications or supports. The ILP and aligned modifications and supports will be provided to the child to enable the child to advance appropriately toward attaining the annual goals and be involved in and make progress in the general education curriculum, and be afforded an equal opportunity to participate in extracurricular and other nonacademic activities including, to the maximum extent appropriate, in nonacademic settings and services.

Great Hearts ensures that to the maximum extent appropriate, children with disabilities are educated with children in the general education setting. Special classes, separate schooling, or other removal of children with disabilities from the regular educational environment will occur only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily. Great Hearts is also intentional in arranging for the provision of nonacademic and extracurricular services and

activities, ensuring that each child with a disability participates with nondisabled children in the extracurricular services and activities to the maximum extent appropriate to the needs of the child.

A continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services. The continuum includes instruction in regular classes, special classes, special schools, home instruction, and instruction in hospitals and institutions; and makes provision for supplementary services such as resource room or itinerant instruction, to be provided in conjunction with regular placement. Extended School Year Services Extended school (ESY) services are provided to the child with a disability beyond the normal school year, in accordance with the child's IEP, and at no cost to the parents of the child.

All students that have an IEP or 504 accommodation plan participate in all state standardized assessments and benchmark assessments that are implemented at the beginning, middle and end of the year for the use of progress monitoring. These assessments reveal targeted needs in supporting the performance targets and accountability measures for all students. Progress monitoring for students with disabilities occurs on a regular basis per their IEP, ensuring that students are progressing to meet their annual IEP goals.

Quarterly progress monitoring of the ILP and aligned IEP goals is reported with the issuance of student report cards.

Each Great Hearts school has a highly trained and certified team to oversee and meet the needs of special populations and at-risk students, to include a dedicated coordinator for each program that is responsible for the compliance, required documentation, facilitation of required meetings, and leads campus teams in the implementation of daily instruction for students with special needs and unique learners. In addition, Great Hearts teams include certified teachers trained in their area of instruction, as well as teacher apprentices that have received training related to their work under the supervision of our certified educators. Great Hearts works diligently to provide specialized training for general and special education teachers and staff to better support special needs students, as well as training that is more specific to diverse and unique student needs.

Great Hearts offers a special education program that includes a full continuum of related services that include, but not limited to educational support, speech and language services, physical therapy, occupational therapy, counseling, as well as visual and audiological services. Our students receive related services from individuals licensed by the state of Louisiana in their specific areas of support services.

Great Hearts Campus Special Programs consist of the following staff and supports:

- Exceptional Student Services (ESS) Team including a Lead ESS Coordinator, One or more ESS Coordinators, ESS Teachers, and ESS TA's/Paraprofessionals as needed.
- An English Learner (EL) Team including an EL Coordinator, Certified EL Teachers and TA's
- Section 504 Coordinator(s)
- Interventionist(s)
- School Counselor(s)

The Regional and National ESS Director and ESS Regional Team supports all Special Programs campus teams, thus providing leadership and training for the implementation of Special Programs that advance the achievement of students served through Exceptional

Student Services (Special Education), Section 504 , EL/Language Program, Counseling and Crisis Intervention, and Hospital Homebound Services. The Regional Team collaborates with parents, campus coordinators, head of schools, teachers, and support personnel regarding instructional issues. The Regional team assists in monitoring compliance with all state, federal and local requirements under the supervision of the Regional Exceptional Student Services Director.

Great Hearts has established practices that provide for continuous professional development to all teachers and staff to meet the unique needs in the planning, delivery of robust curriculum and instruction, and accountability for the success of every child. Great Hearts' professional development encompassed consistent Socratic seminars, curriculum specific training, prescriptive instructional strategies, and supports for our unique and exceptional learners. Professional development in data systems that aid in the efficacy of each special program that supports progress monitoring, the closing of achievement gaps, as well as the achievement, performance, and accountability of all students.

Tracking the efficacy and equity of the Special Education program begins in the RTI and identification processes as administrators and interventionists meet quarterly to review data to make two determinations:

- Are the majority of students responding to their interventions, signaling the effectiveness of the programming?
- Are any student subgroups over-represented throughout the school and grade levels, signaling an inequitable implementation of Tier 1 universal instruction, intervention, and identification.

Similarly, the same questions and data are analyzed quarterly in regards to student representation in Special Education and ILPs.

English Learners: Great Hearts' specialized language program, The English Learner (EL) Program, addresses the needs of students through procedures established by the Louisiana Department of Education and federal law. The program provides classroom environments which facilitate language learning and ensures appropriate placement, services, and monitoring of EL students.

Students are initially identified for EL services through a Home Language Survey and English Language Proficiency Screener. Students identified as EL receive services through an EL Pull-Out Program in-class support model. Great Hearts has certified EL coordinators, certified EL teachers (as needed), and trained apprentice teachers within the program. Ongoing professional development of the EL staff is provided throughout the school year and regional team meetings for collaboration, standardization and compliance are held monthly. The EL Coordinators are supported by Regional EL Specialists and/or a Director.

The EL instruction program provides individualized linguistic accommodations for classroom teachers, small group instruction during ELAR and as needed support in all other subjects. All instructional support is aligned with the general education classroom curriculum, LEAP 2025, and English Language Proficiency Standards and encompasses Structured English Immersion Instructional Strategies. The progress of ELs is monitored through class grades, standardized assessments, and the annual English Language Proficiency Test (ELPT).

Working closely with the campus testing coordinators and the regional testing coordinator, assessment results are analyzed to track student progress both in academics and English

language acquisition. Assessment results and student progress is communicated annually to parents. English Learners are reclassified as English Proficient (EP) based on results from the state's ELPT and other required academic data. When students meet the state's exit criteria, they are exited from EL services in accordance with Louisiana Department of Education guidance, with parent notification and approval documented as required.

EL Coordinators at each campus provide ongoing professional development in English Language support and state assessment for language proficiency to all classroom teachers throughout the school year. ELs are a part of the general education classroom composition and receive the same education as their grade-level peers. They are included in all extra-curricular and cultural/community building activities.

Great Hearts effectively communicates with parents in their native language through a translation agency and translated documents. During the school year, Great Hearts invites the parents of English learners to an information night to present program information and answer questions.

Academically Advanced Students: Great Hearts is committed to cultivating the hearts and minds of all students through the pursuit of Truth, Goodness, and Beauty. Great Hearts offers a significantly advanced, rich, and rigorous liberal arts curriculum that promotes and supports all student talents and gifts and continues to inspire and challenge them toward pursuit of excellence. This holistic approach, of content in the Languages, the Arts, Mathematics, the Sciences, Humanities and Philosophy, integrated into rigorous and rich curriculum, allows for every child to explore their own curiosity and sense of wonder, that creates critical independent thinkers, life-long learners that become well-rounded human beings that will lead the future. All Great Hearts Lake Charles, students will be expected to follow the same course sequence as other students in the Great Hearts network. While students will learn at different paces, Great Hearts believes that true education is a matter of development over time and within a stable community. Great Hearts gives students individualized attention, but within a liberal arts core curriculum that is advanced by nature of the content.

The Great Hearts model has been influenced by the research of leading educational psychologist Carol S. Dweck (author of *Mindset*) in giving students a common course of study and not implementing a gifted and talented program. Because of this founding philosophy, Great Hearts Lake Charles will not offer specific gifted/talented instruction. Rather, Great Hearts will continue to work diligently with teachers to differentiate their instruction in the classroom so that all students of all levels are challenged and supported.

Behavior Management

16. a,b,c,d,e. Great Hearts Lake Charles takes an intentional approach to behavior management by cultivating a unified and intentional school culture grounded in the pursuit of truth, goodness, and beauty. The goal is to graduate thoughtful leaders of character who contribute to a more just and humane society. This culture supports Louisiana's commitment to equitable and inclusive learning environments under Bulletin 126 by promoting respect, belonging, and high expectations for every student. Classrooms are designed to be structured and distraction-free, creating spaces where all students – regardless of background or ability – can engage fully in learning. Shared practices such as the honor code and student uniform foster community identity and mutual respect, while daily interactions reinforce responsibility, empathy, and perseverance.

The Great Hearts culture is proactive, not punitive. Teachers guide students in developing self-discipline, integrity, and social awareness through Socratic dialogue, character reflection, and shared accountability. Academic and behavioral expectations are clear, consistent, and compassionate, ensuring students understand that mistakes are opportunities for growth. The integration of academics, the arts, and athletics provides students with multiple pathways to demonstrate leadership and character. Enrichment programs, mentorship, and extracurricular offerings build confidence and strengthen interpersonal relationships, contributing to a safe and inclusive climate that prevents behavioral issues before they arise.

Family partnership and student voice are central to maintaining a positive culture aligned with state expectations for engagement and equity. Parents are invited to collaborate through service, volunteering, and regular communication about student growth, while students are empowered to take ownership of their community through leadership opportunities, class discussions, and peer mentorship. This intentional culture, centered on respect, virtue, and inclusion, proactively shapes student behavior, promotes social-emotional development, and ensures that every student at Great Hearts Lake Charles is supported to thrive academically and personally within a just and caring school community.

All discipline information is communicated in the Family Handbooks and introduced to parents during the annual Parent Information Night, which takes place each summer before the school year begins. All parents and guardians are asked to attend; translation services are available for ELL parents. Parent Information Nights are held in the evening and significant advance notice is provided to parents, with the aim of removing conflicts and having as many parents as possible in attendance.

Great Hearts implements a behavior management system for the purpose of the common good of the Academy and its maintenance as a place of learning and moral development. Great Hearts believes that habits of behavior play a significant part in forming habits of mind. Teachers and staff members will make every effort to enforce all rules consistently, informatively, and with a heart of mercy for the student's overall well-being, thereby creating safe and nurturing places to learn.

Great Hearts students strive to make the most of their educational opportunities and recognize the benefits of mutual encouragement, respect, courtesy, and helpfulness. Nevertheless, students are young and human, and they will make mistakes in speech or behavior – they are still learning how to appropriately comport themselves. Though behavioral mistakes require correction and reminding, not all may need corrective action. That said, mistakes that are disruptive to other students and to teachers cannot repeatedly occur and interrupt learning, nor will deliberate or intentional choices.

The philosophy of Great Hearts is that students are young adults in the making who will learn civil, polite, and respectful conduct by the example of their teachers and other adults. Consequently, students will be treated with respect and courtesy by staff and will be expected to treat not only all adults on campus with such respect, but one another as well. Several examples of such respect are a student's willingness to refrain from talking in class when others have the floor; a respect for the property of the school and of other students; a willingness to refrain from sarcastic or critical comments towards others; and a willingness to ask (and give) forgiveness when someone has been wronged.

Great Hearts' guiding policy is to be fair, firm, and consistent in the application of discipline for inappropriate behavior. Great Hearts reserves the right to exercise reasonable judgment as an

individual circumstance might dictate, but the following guidelines for discipline are provided as standard tenants.

One corrective action response is that students may be assigned detention or lose the privilege of lunch- time recess or extra-curricular activity, or be required to perform some work detail, such as cleaning, depending on the nature and frequency of offenses such as: littering; possession and/or chewing of gum on campus; being late to class; talking out of turn or otherwise disrupting class; use of profanity or disrespectful speech toward other students; uniform and dress code violations; or other inappropriate behaviors. If a student repeatedly violates any of the above, the parent may be contacted, and other disciplinary measures may be taken.

Detentions can be serious in nature and a high number of detentions can indicate a student's general unwillingness to cooperate with the school. If a student has received five detentions for any reason in a school year, then he or she may be suspended for a duration determined by the head of school. If a student has received six detentions for any reason in a quarter, then he or she will be suspended for a duration determined by the head of school. A student may be suspended for a lesser number of detentions if many of the detentions are received for the same offense (such as tardiness), or if the head of school and Dean determine that the accumulated detentions are of a serious nature and warrant immediate action.

In the case of more serious misbehavior, such as forging a parent's signature, lying to an adult, cheating on exams and/or academic assignments, fighting, theft, willful destruction of property, defiance of authority, disrespect of adults, leaving campus without permission, skipping class, etc., the parent will be contacted, and other disciplinary measures taken.

Threats of violence and physical, verbal or sexual harassment are illegal and will result in parent contact and, depending on the nature of the offense, may result in other disciplinary measures, including notification of law enforcement authorities, suspension, and expulsion.

The head of school or Assistant head of school may suspend any student for up to 10 school days for serious cause, including, but not limited to the following:

- Defiance of authority of Academy staff
- Disregard or disobedience of school rules and regulations as outlined in the Family Handbook
- Verbal abuse of adults or students
- Disruptive or disorderly behavior
- Violent or threatening behavior
- Bullying or harassment
- Fighting
- Destruction or theft of school property or personal property
- Truancy
- Persistent absenteeism that is not due to certifiable medical illness or disability
- Persistent tardiness
- Excessive accumulation of infractions

The school officials involved shall make reasonable efforts to verify facts and statements prior to recommending a discipline response.

In cases of suspension from school, the head of school shall present the family with the reasons and evidence for suspension and provide the family with an informal opportunity to respond.

The parent/guardian will receive a formal written notice of suspension. During out-of-school suspensions, students are provided the opportunity to complete classroom assignments, homework, and exams. Depending on the severity of the offense, the student's past behavior, and other circumstances, the school may choose to impose in-school or out-of-school suspension. There is no right to appeal a short-term (less than 10 days) suspension imposed by the school.

The head of school may recommend to the Disciplinary Hearing Committee suspension for over 10 days and/or expulsion of a student for serious cause. The parent/guardian will be notified of the intent to suspend for over 10 school days or expel the student, and a hearing shall be held in accordance with the Academy's policies and procedures. If a student is being recommended for a long-term suspension or expulsion, the parent/guardian will be provided with a complete copy of the Academy's Long-Term Suspension and Expulsion Policy and Procedure regarding these discipline procedures.

Great Hearts is committed to meeting all requirements of Section 504 of the Rehabilitation Act, the IDEA, and state laws regarding disciplining of students with disabilities, including conducting Manifestation Determination Reviews (MDRs) when determining suspension or expulsion for students with disabilities. In accordance with R.S. 17:416.2, all students who are expelled or suspended for longer than ten days will be provided with academic instruction at an alternative setting. As such cases are rare, plans for alternate setting instruction are developed on a case-by-case basis and designed with consideration for the needs of the individual student and family.

Great Hearts collects annual data on long-term suspensions and expulsions that are disaggregated by sub-group (gender, race, ethnicity, economically disadvantaged, and IEP/504) to ensure that no subgroup is disproportionately represented in disciplinary categories. We monitor subgroup participation rates in absenteeism, tardiness, behavior referrals, assignment of detentions, and suspensions. When it becomes evident that a subgroup is experiencing difficulty, the nature of the response varies by campus and region, but all administrators are equipped to review data, find irregularities, and systematically employ a root-cause identification and solution modification process.

For example, at one school, Great Hearts explored the pattern by grade level to identify whether a particular teacher or administrator needed to be addressed. Within particular categories of infractions, the team examined patterns, such as time of day, location in the school, and supervisory arrangements (hallway passing, in-classroom, lunch periods, recess, etc.). Rather than make assumptions about what lay behind the patterns, Great Hearts brought the patterns to the attention of the affected teachers and administrators so that they could work through them to identify root causes. At a Texas campus, leaders observed a challenge with the SPED population, and addressed it by digging more deeply into the data to see whether there are particular diagnostic categories that require greater teacher awareness and training. Great Hearts is also considering changing recess patterns to reduce student density during transitional periods where there is large-group supervision.

To minimize exclusionary disciplinary practices, Great Hearts trains all faculty in Positive Behavior Interventions and Supports (PBIS). In essence, PBIS centers on affirming positive student behaviors and recognizing and rewarding active participation and exemplary conduct. At the same time, teachers ignore or under-react to negative behaviors, thus making it clear that they are unwelcome and unworkable in a healthy classroom environment. Students who require discipline are addressed individually away from the class, which avoids shaming and the

stigmatizing of students, as well as minimizing the dynamic where students act out for the attention and entertainment of their peers. All teachers are trained in PBIS during intensive full-day summer institutes and weekly professional development sessions throughout the year. PBIS is the routine classroom management system that teachers use in Great Hearts classrooms with support from dedicated deans, assistant head of schools, and the campus head of school.

See Appendix 2: School Model Master Plan

Parent and Community Engagement

17. a, b. Great Hearts believes that a classical education – typically available only at elite private schools to those with the financial means to afford it, excluding all low-income and most middle-income families – should be accessible to all young people, regardless of socio-economic status, including families that have not previously considered a classical education as an enrollment option. To this end, Great Hearts will deploy strategic and intentional outreach in the community to reach a diverse audience segmentation. In its outreach, Great Hearts will convey that its programming is broadly appealing and fully accessible to all families, and through community engagement will identify any areas in which the program does not seem accessible.

In the spirit of community engagement, once the school is established parents will be encouraged to embrace and participate in the school's academic and ethical vision. As the central adult role models and teachers in their own children's lives, parents can appreciate the greater significance of the school's vision and the long-lasting value of such an education, and they can support their children in their journey towards it. Volunteerism is vital to the school's prosperity.

Great Hearts views its campuses as not just schools but as community and cultural gathering places. Grandparents, extended family members, and community members at-large are welcomed to the campus on a regular basis for events such as student performances or open enrollment open houses.

The Parent Service Organization (PSO) is a service organization within each Great Hearts Academy. All parents and guardians of students are members of the PSO. The purpose of the PSO is to serve the school's students and teachers through coordinating and assisting programs and activities that are critical to their success. Involvement in the PSO is structured according to service committees, with each committee devoted to a specific area of school life. At the beginning of each school year, each campus hosts a meeting for the PSO at which individuals who are interested can sign up for different volunteer opportunities, including hearing and vision screenings, school celebrations, festivals, and other activities.

Academy Advisory Committees (AAC) are established at each campus as well. A volunteer group unique to each academy, each AAC consists of parents from the school community and representatives from school administration and support services staff. Its purpose is to bring together school stakeholders, facilitate communication, foster understanding, build relationships, provide opportunities to discuss and offer input on issues of interest at the school, and support the head of school in his/her responsibilities to improve school life.

Great Hearts school leadership, regional leadership, and board members are committed to hearing and addressing concerns brought by any member of the Great Hearts and Lake Charles community, including students, parents or guardians, and other community members.

The following is a description of how parent/guardian, students and/or community concerns will be addressed at Great Hearts Lake Charles based on the plan/policies set forth in the family handbook.

Classroom teachers and key members of the site management team - including the dean of students, assistant head of school, and head of school - are in constant contact with parents. At the start of the year, they meet parents during informational meetings, open houses, and orientations. As the year progresses, they see parents daily staffing the pick-up and drop-off lines, handling drop-in visits, and through other means. Teachers send out weekly newsletters, post special messages celebrating student accomplishments, and contact parents to schedule calls when student challenges arise. Through these interactions, many staff members initiate strong relations with families, open up communication lines, and make themselves available when parents voice concerns.

When a parent has a concern, s/he is expected to start by addressing it with the classroom teacher through a conversation. If that interaction does not resolve the matter, it will be taken up between the dean of students or assistant head of school and the parent. Teachers are trained to raise unresolved matters with the dean or assistant head of school, and the parent also has a direct channel of communication. By engaging in a threeway meeting with the parent, teacher and administrator, a second attempt is made to resolve the matter and take appropriate action to remedy it.

If the concern remains unresolved, a meeting is scheduled with the head of school. To set the stage for a successful conflict resolution, the head of school obtains background information, reviews communications, and gets briefed on the material issues that caused the conflict. Using his/her judgment, the head of school will call together the parties required to resolve the conflict, frequently starting with a meeting with the parent(s) to listen to their concerns and seek to understand any root causes

Once the head of school has met with the parent, the matter may be resolved, documented, and/or elevated to the regional president and/or board of directors if it remains unresolved. This sequence of steps is called for in the grievance policy documented in the Great Hearts family handbook, which is distributed among all parents, addressed in orientations, and provided to teachers as part of structured trainings.

Overall, all teachers, administrators, parents, students, and other community members are encouraged to address conflicts at the lowest level with a focus on constructive problem solving and healthy conflict resolution. The only exception is a situation in which a student's or staff member's safety is put at risk, in which case a community member is encouraged to go directly to the head of school with a concern.

If a concern is not resolved through direct communication or a written notice of concern, parents, students, and community members are encouraged to follow the school's grievance process, which provides a pathway for escalation from the head of school to the executive director to the board of directors. Two principles guide this process: (a) staff are to attempt to resolve grievances as quickly and fairly as possible; and (b) all parties are encouraged to resolve concerns at the lowest level possible.

If the parent concern is about a board policy or decision, all governing board meetings are public and include a “call to the public.” During this time, any member of the public may ask to speak to voice concern about particular policies and decisions. All board meetings are publicly posted using a formal notice of meeting so that members of the public have access to meeting times and locations.

This grievance procedure is just one structure in the overall administrative effort to resolve concerns as fairly, transparently, and constructively as possible in the best interests of students and the health of the entire school community.

See Appendix 3: Grievance Policy

GROWTH PLAN

18. a, b, c, d, e. Great Hearts Lake Charles will adopt the same policies and practices as existing schools in the Great Hearts Louisiana network with regards to the following aspects: promotion and graduation policy; instructional leadership roles; hiring processes; food services; and transportation. Teacher and school leader evaluation policies will also remain the same at the Lake Charles campus.

19. By expanding to Lake Charles, Great Hearts Louisiana will broaden our reach to serving an additional 1,456 of students and families in the state of Louisiana. Continued growth in the state is consistent with Great Hearts’ national model of growth. Since inception in 2002, our network in Texas has grown to 17 total schools and in Arizona to 23 total schools. We have learned that statewide expansion not only increases access to more families, but also improves the overall quality of Great Hearts schools within the state.

We believe expansion improves overall school quality because:

1. **Replication facilitates success.** Great Hearts Lake Charles will benefit by learning from Great Hearts Harveston. Our new school will be able to implement academic and operational practices that have been proven and codified, helping the new school avoid typical road bumps that may come in start up. As described previously, Great Hearts has a documented network effect showing that multi-site networks develop stronger coaching capacity and teacher retention than single-site campuses.
2. **Talent begets talent.** With more campuses across the state, our network is able to develop strong educator pipelines and training programs to strengthen teacher and leader retention and broaden the funnel of staff interested in and prepared to excel in our schools.
3. **Resources are easily shared.** Statewide growth also allows our academies to share curriculum, technology, and network staff, creating efficiencies and improving services network-wide.

20. a, b, c. Great Hearts Louisiana is a non-profit corporation under applicable Louisiana non-profit law. Great Hearts Louisiana (GHLA) has not been involved in any current or past litigation or arbitration proceedings as an organization. No GHLA school has had its charter contract terminated, voluntarily closed, or failed to be renewed by an authorizer. GHLA currently operates one campus under charter: Great Hearts Harveston, authorized by East Baton Rouge Public Schools in 2021, which opened in August 2022 and is currently in its third year of operation. At the Great Hearts America (GHA) network level, no schools in the GHA Louisiana or Texas networks have closed. One campus in the GHA Arizona network (Great Hearts

Scottsdale Prep) voluntarily closed in 2019 due to facility constraints unrelated to academic or financial performance. There have been no non-openings in the GHLA portfolio: Great Hearts Lake Charles received a Type 1 charter approval from CPSB in January 2026 but GHLA is pursuing the Type 2 state-authorized pathway per CPSB's recommendation rather than opening under the Type 1 approval. This constitutes a strategic pathway decision, not a failed opening.

ORGANIZATIONAL PLAN AND CAPACITY

Staffing

21. Great Hearts Lake Charles does not intend to contract with a management or educational service provider.

GHLA is incorporated by a Sole Member, Great Hearts America (GHA), an Arizona-based non-profit organization. GHA is the parent non-profit to all of the Great Hearts regions across the country. GHA ensures governance and organizational support and oversight to the Directors of GHLA to ensure that the fiduciary duties of care (*exercising sound, legal, and ethical board best practices and acting on an informed basis*), loyalty (*giving uncompromised allegiance when making decisions affecting GHLA*), and obedience (*acting in good faith and in furtherance of the law and GHLA's goals and mission*) are consistently exercised by the Directors. As Sole Member, GHA retains the final authority to approve new members to the GHLA board.

In addition to being the Sole Member of the GHLA corporation, GHA provides essential management support to ensure the faithful and consistent implementation of the Great Hearts model. Areas of expertise and direct service that GHA provides to GHLA and each of its schools include:

- Strategic planning and goal-setting
- National teacher and leader talent recruiting
- Teacher professional development and onboarding
- Human resources and payroll
- Accounting
- Accounts payable
- Facility financing
- Best practices in school and enrollment operations
- Best practices in special education
- Best practices in classical pedagogy, teacher coaching, and evaluation
- Classical curriculum and lesson plans aligned to Louisiana state standards
- Analysis of academic outcomes and school improvement / intervention planning
- Analysis of teacher, parent, and constituent satisfaction and a school improvement dashboard
- Fundraising & community resource engagement

GHLA will hold a state-compliant and GHLA-board approved management agreement for the expertise and services provided above. GHLA leverages the scale of GHA to not only access high quality and mission-aligned services but to receive them at less cost than if GHLA attempted to recreate all of these services independently.

In turn, the state-level GHLA team is responsible for:

- Grounding in & compliance with applicable authorizer, state, and federal policies and laws
- Authorizer and state reporting
- Regional and campus-level budgeting
- Financial projections
- Procurement
- Hiring of staff and teachers
- Management and oversight of schools, leaders, teachers, and staff
- School operations, including enrollment and maintenance of all student level records
- Special education services
- School lunch programs
- Academic performance
- Implementation of school improvement plans
- Facility oversight and maintenance
- Ongoing reporting to the GHLA Board on school performance and meeting of goals

With the strong coordination of the GHA and GHLA teams, the GHLA board has the tools to fulfill its fiduciary responsibility to oversee the high-performing school to be created and grown within the Calcasieu Parish.

22. The direct reporting line will run: (1) from the board of directors to a the executive director of Great Hearts Louisiana; (2) from the executive director to the head of school of the Great Hearts Lake Charles campus and director of finance of Great Hearts Louisiana; (3) from the head of school to the assistant head of school, dean and faculty members. All campus employees will have a direct reporting line to the head of school unless the head of school, at his/her discretion, chooses to have employees report directly to the assistant head of school or other members of his/her leadership team.

The board of Great Hearts Louisiana will directly manage one employee, the executive director of Great Hearts Louisiana. The executive director or superintendent will, when the Lake Charles regional office is built out over time as the first school expands and subsequent schools are opened, manage all statewide leaders, including the Director of Finance, who will also have a co-reporting relationship to the GHA finance team. The head of school will report to the executive director, and accountability, oversight, and evaluation of the head of school will be led and conducted by the executive director.

Great Hearts America is an umbrella 501(c)(3) non-profit organization that raises significant ongoing philanthropic commitments and secures low-interest facilities financing so that it can retain an accomplished executive team, support the network's growth in existing regions, and enable entry into new regions in a judicious, high-quality manner.

To bridge Great Hearts into Lake Charles, the co-founder of Great Hearts America, Dan Scoggin, is devoting significant personal time to making site visits, generating resources, and otherwise overseeing Great Hearts' growth into Louisiana. Dan Scoggin brings a wealth of depth and experience having played instrumental roles in leading Great Hearts' development over the past 25 years.

To support the establishment of Great Hearts Lake Charles, Great Hearts America is providing executive leadership services in the following areas: (a) marketing and communications; (b) human resources; (c) curriculum and instructional quality; (d) operational supports; (e) finance; and (f) development. In the early going, Great Hearts America's engagement will be intensive,

but as a dedicated local team is built, Great Hearts America will transition some services out of a hands-on execution stance while some services will remain with GHA for the best outcomes and coordination across the national Great Hearts network.

23. Great Hearts Lake Charles is currently budgeting for the following staffing plan aligned with our growth.

	Year 1	Year 2	Year 3	Year 4	Year 5	Full Scale
Students	312	468	624	728	832	1456
Teachers	12	18	25	28	31	71
Teachers Aides	12	18	24	24	24	24
Interventionists	2	2	3	4	4	10
SPED Teachers and Aides	4	6	8	10	12	12
Student : Teacher (rounded)	11 : 1	11 : 1	11 : 1	12 : 1	12 : 1	12:1
Support, Community, and Central Services Staff	8	9	9	9	9	16
Assistant head of school & Deans	2	2	2	3	3	6
Head of School	1	1	1	1	1	2
Student : Total Adults (rounded)	5 : 1	9 : 1	9 : 1	10 : 1	10 : 1	10:1

24. Great Hearts Academies is committed to hiring and retaining extraordinary teachers, who are passionately committed to cultivating our students' hearts and minds. We seek highly skilled professional educators, who can foster a depth of inquiry in their classrooms and a sense of wonder in their students, hold high academic standards, and guide students as they grow into virtuous members of society. Great Hearts has a unique hiring profile which prioritizes cultural and philosophical alignment and mission-fit, over a particular set of credentials, and it employs a rigorous, multi-layered screening process. As a result, historical hiring data has shown that Great Hearts must attract at least seven candidates for every hire that it makes. Great Hearts has successfully met and exceeded this goal over the last five hiring seasons, even as the national network and hiring scope has grown exponentially.

Great Hearts has also worked to ensure its application process is streamlined and user-friendly, resulting in fewer passive or lost candidates who find it online but delay applying due to application length or complication. Further, among those who do apply, Great Hearts employs a series of touchpoints - prompts and interactions (including the opportunity to complete a brief

video interview at their convenience) - which encourage continued interest in those who otherwise may not have heard from Great Hearts.

Overall, while the search, identification, and successful engagement of academic talent remains a tremendous charge, Great Hearts is committed to an uncompromised set of standards in finding the individuals who are truly at the heart of its project. Great Hearts believes the intentional and strategic work of the last decade represents a reliable foundation for continued recruitment of the best faculty in the country.

At Great Hearts Academies (GHA), neither the employee nor the company is committed to an employment agreement for a fixed period. Employment with GHA is at-will. Both the employee and management have the right to terminate the employment relationship at any time, for any reason. Except for the at-will nature of the employment, the company reserves the right to suspend, terminate, interpret, or change any or all other guidelines mentioned, along with any other procedures, practices, benefits, or other programs of Great Hearts Academies. These changes may occur at any time, with or without notice. There is no concept or practice of tenure at GHA. GHA will use fair and non-discriminatory procedures in determining which employees will be offered an employment agreement for the following year.

Background Checks. Great Hearts Lake Charles must comply with R.S. 17:15 “Criminal History Review” and R.S. 15:587.1 “The Louisiana Child Protection Act.” Background checks will be completed for all Academy Employees, Home Office Employees, School Board Members, Nurses/Health Assistants, After School Program Staff and Athletic and other Coaches (Voluntary or paid), and any other school Employees who might reasonably be expected to be placed in a position of supervisory or disciplinary authority over school children. The background check, which is completed by the Louisiana Bureau of Criminal Investigation (LCBI), must include the employee’s fingerprints and a signed statement authorizing the release of information from the LCBI to the school.

It is the responsibility of the employees of Great Hearts Academies to:

- Submit a RAP disclosure from to the Bureau of Criminal Identification and Information of any criminal background record.
- Immediately report an arrest for or charge that may affect their fingerprint-based background check, (examples include but are not limited to: sexual abuse, assault, exploitation; first/second degree murder; drug offenses and DUI).

Employees who fail to timely notify Great Hearts of:

- An arrest or charge impacting background check
- Allegations, investigation, or termination of employment outside GHA based on misconduct

will be subject to immediate dismissal and not be entitled to any wages or benefits past the date of termination.

Great Hearts also conducts its own background and reference check prior to the hire of the individuals listed above, which includes but is not limited to, a county court criminal background check in counties of residence, and phone/verbal reference checks with former employers in addition to collecting required application materials. Great Hearts may also check against publicly available databases of criminal offenders and sex offenders.

25. Great Hearts Academies is committed to hiring and retaining extraordinary teachers, who are passionately committed to cultivating our students’ hearts and minds. We manage growth

and teacher turnover by implementing a thoughtful, methodical, and proven teacher recruitment strategy. We seek highly skilled professional educators, who can foster a depth of inquiry in their classrooms and a sense of wonder in their students, hold high academic standards, and guide students as they grow into virtuous members of society. Great Hearts has a unique hiring profile which prioritizes cultural and philosophical alignment and mission-fit, over a particular set of credentials, and it employs a rigorous, multi-layered screening process. As a result, historical hiring data has shown that Great Hearts must attract at least seven candidates for every hire that it makes. Great Hearts has successfully met and exceeded this goal over the last five hiring seasons, even as the national network and hiring scope has grown exponentially.

Identifying and building relationships with philosophically aligned colleges and universities, specific liberal arts, honors, great books programs, and even individual professors have formed the backbone of Great Hearts' efforts to attract both new college graduates and experienced alumni. The expansive network of relationships that Great Hearts has built for over a decade includes about 150 "target schools" across the country. The Great Hearts connection to these pipelines is strengthened by university campus visits by the Talent team and alumni, as well as "reverse recruiting trips" wherein professors and leaders from higher education are able to tour Great Hearts campuses, interacting with Great Hearts leaders, faculty, and students - visits which engender further enthusiasm and provide first-hand knowledge of the organization to academic contacts who advocate for and refer Great Hearts to their graduates and colleagues who have a calling to teach in public schools.

Great Hearts also devotes significant attention to increasing its presence and student awareness on the campuses of local colleges and universities. Great Hearts focuses on building relationships with professors and programs within local universities, such as LSU and McNeese State, within both Education departments and the broad swath of academic content major areas from which it primarily recruits, such as history, mathematics, Latin, and engineering. Great Hearts has also found that presence in local academic circles, as well as word-of-mouth promotion from families and current employees, are effective mechanisms for growing familiarity with Great Hearts as a wonderful place to work in the community at large, amongst working professionals in and outside of industry.

Great Hearts desires to build partnerships and cooperative programs with local colleges and universities that it believes will be instrumental in continuing to meet growing hiring needs. Nationally, Great Hearts has developed partnerships with several institutions of higher education such as St. John's College in Sante Fe, NM, and Annapolis, MD, Templeton Honors College at Eastern University, and the University of Dallas. These institutions share the Great Hearts commitment to liberal arts education and have allocated scholarships specifically for Great Hearts teachers to participate in their programs. Great Hearts partners with these institutions to ensure that their programming is tailored to serve the needs of teachers in classical liberal arts schools. An example of one such program is a partnership with the University of Dallas (UD), where it helped to establish a Master of Arts in Teaching program focused on Classical Education. Students take classes at UD during the summers and complete practicum work on Great Hearts campuses during the Fall and Spring semesters. Additionally, Great Hearts piloted a SPED "Teacher in Residence" program in cooperation with other university and community college program that allows students to work provisionally on Great Hearts campuses in Special Education while they complete their certification. Both programs have the effect of introducing Great Hearts campuses to additional students and graduates who are yet more likely to be motivated and quality candidates.

Beyond these targeted higher education measures, Great Hearts has invested significant time and money in increasing and refining its presence on a number of online recruiting platforms, such as LinkedIn, Indeed, and Glassdoor, and most recently, Handshake, which allows it to search for, identify, and directly message college seniors, graduate students and alumni from around the country, about Great Hearts teaching opportunities. Great Hearts has also worked to ensure its application process is streamlined and user-friendly, resulting in fewer passive or lost candidates who find it online but delay applying due to application length or complication. Further, among those who do apply, Great Hearts employs a series of touchpoints - prompts and interactions (including the opportunity to complete a brief video interview at their convenience) - which encourage continued interest in those who otherwise may not have heard from Great Hearts.

Overall, while the search, identification, and successful engagement of academic talent remains a tremendous charge, Great Hearts is committed to an uncompromised set of standards in finding the individuals who are truly at the heart of its project. Great Hearts believes the intentional and strategic work of the last decade represents a reliable foundation for continued recruitment of the best faculty in the country.

26. For a detailed overview of Great Hearts' hiring plan for the first five years of operation and at scale, including the number of new employees to be hired across each role, see our response to question 23 of this application. The hiring plan is organized around annual grade level additions and enrollment growth and corresponding increases in staffing needs. The timeline for staff hiring is as follows:

Year 1 - All new hires (12 total) by June 2027

- Head of School hired by January 2027
- Assistant Head of School/Deans hired by March 2027
- SPED/intervention staff hired by May 2027

In all subsequent years, new staff will be hired by the May prior to the upcoming school year. Generally, leadership positions are prioritized 4-6 months before the school year; teaching positions are prioritized by April before the school year, and filled on a rolling basis. All hiring timelines will be managed by the GHA talent team with support from the Louisiana Director.

This staffing overview aligns with the budget provided in the Overview Template. As a slow growth model, Great Hearts Lake Charles will make a significant number of new hires each year, with an emphasis on teachers and teachers aides each year. Great Hearts' leadership understands that, as a network of public charter schools, our "product" is our people. Great Hearts cannot provide a high quality of education if it does not recruit, select, prepare, equip and retain the best possible employees in every position, from janitor and bus driver to classroom teacher and counselor to dean and head of school. Because of this primacy that Great Hearts gives to people, it has allocated significant resources to all aspects of HR functions. Great Hearts is confident that these functions are serving the network well in Arizona, Texas, and Louisiana.

Recently, Great Hearts America was awarded a \$34M federal Charter Schools Program grant to support expansion and replication efforts across the country, including in Louisiana. This grant allows for dedicated funding in support of teacher recruitment and training, significantly increasing our capacity to identify, attract, and hire the highest quality staff for each of our new charter schools. CSP funding will also be leveraged to ensure the success of our training

programs, which include intensive full-day institutes for a minimum of 3-5 weeks in June and July prior to opening in early August 2027.

School Leadership Team Capacity

See Appendix 4: Resumes of Leadership Team

Head of School Note: The permanent Head of School for Great Hearts Lake Charles has not yet been hired. Jason Doughty, Executive Director of Great Hearts Louisiana, will serve as interim Head of School pending the hire of a permanent Head of School, which is targeted for Fall 2026. Mr. Doughty’s resume is included in Appendix 4. The job description for the permanent Head of School position is also provided in Appendix 4. Great Hearts has a rigorous Head of School selection process that includes multiple rounds of interviews, demonstration lessons, leadership simulations, and community stakeholder input. The Head of School candidate pool will be drawn from GHA’s internal leadership pipeline as well as external recruitment, with a preference for candidates with Louisiana teaching certification and familiarity with the classical education model.

Charter Board Governance

27.

Board Member Roster

Board Member	Role	Responsibilities	Expertise
Ty Gose	Chairman	Financial oversight, Strategic Planning, Leader hiring/firing/evaluation, Board recruitment and development	Real Estate, Finance, Management and Operations
Adonica Pelichet Duggan	Vice Chairwoman	Academic oversight, Strategic Planning, Local and state policies and compliance, Advocacy	Academics, Community Relations, Advocacy
David Whidden III	Secretary	Academic oversight and classical education, Higher ed partnerships, Leadership evaluation	Academics, Community Relations, Leader evaluation
Erin Franco	Member	Development, Parent voice and relations	Community Relations
Jim Stoner	Member	Legal and ethical oversight, Strategic Planning, Higher ed partnerships	Legal Issues, Management and Operations, Higher ed partnerships
TBD	Member	Currently recruiting Lake Charles residents to join the board	Community Relations

Board Composition and Residency: The Great Hearts Louisiana board currently consists of five members. The board currently has one open seat due to the recent resignation of Katie Fetzer. This seat will be refilled within 90 days of her resignation and a new board member for this seat is being recruited from the Lake Charles community. The five current members bring expertise in finance, legal, academics, management and operations, and community relations. Pursuant to Louisiana charter school law, 60% of charter board members are required to be residents of the school's parish. As clarified in the LDOE's 2025-2026 Technical Assistance materials, the 60% residency requirement is currently non-evaluative due to a conflict between state statute and BESE policy. Great Hearts Louisiana is actively recruiting Lake Charles and Calcasieu Parish community members for open board seats and is committed to meeting the residency requirement prior to the school's opening. The board composition table is provided above; full resumes are provided in Appendix 5.

See Appendix 5: Board Member Resumes

28. The leadership of Great Hearts takes very seriously the need to establish a corporate structure, including all aspects of governance, fiscal, managerial and operational practices, that can be entrusted with public revenues to operate a charter in the Calcasieu Parish, both initially and ongoing.

To meet these objectives, Great Hearts Louisiana (GHLA) has been incorporated as a Louisiana non-profit organization. GHLA is the entity with a qualified board of directors that would enter into the charter contract, maintain a governing board that meets all legal requirements, and operate as the public charter school meeting all fiduciary requirements. GHLA currently holds a charter with East Baton Rouge Public Schools for an existing campus. As the charter holding entity, GHLA is subject to: (a) all applicable Louisiana non-profit, public school, and charter school laws and policies; (b) Federal IRS non-profit laws and reporting requirements; and (c) all obligations of the charter contract with Calcasieu Parish.

Under Federal IRS reporting requirements, GHLA must complete annual filings and disclose information on its reporting activities, which will be audited annually. Under Louisiana state reporting requirements, GHLA must demonstrate compliance with State conflict-of-interest reporting and all other requirements. Through annual audits performed by independent auditors and transparent local, state and federal reporting, GHLA will demonstrate that it is meeting all conflict-of-interest requirements and exercising its fiduciary obligation to utilize public revenues properly and prudently.

29. New board members are carefully vetted in a multifaceted screening process. All board members receive board training on both the Great Hearts mission and their fiduciary responsibility. Board members must also be approved annually by the Member, Great Hearts, America, for continued service. The board convenes in public session at least four times a year and engages its fiduciary responsibility in authority over the executive team and through scrutiny of the school's performance. The board reviews the annual financial audit, ongoing financials, charter compliance, family satisfaction and faculty retention, and above all, the charter's academic performance and accountability, drilling down to the level of performance on interim assessments, with a focus on subgroup performance and growth. Alongside the regional and national Great Hearts teams, the board annually evaluates the performance of the school leader and holds him or her accountable for school health and performance according to established annual goals.

Regarding committees, GHLA will begin with the foundational standing committees including, but not limited to, Governance, Legal, Finance, Facilities, Community Engagement/Outreach, and Human Capital. And, from time to time, ad hoc committees may be created to address unforeseen issues such as a Disaster Recovery Committee. Each committee, whether standing or ad hoc, will be responsible for ensuring that their convening, and subsequent reports, are targeted towards the organizational and financial health of GHLA, as well as the academic performance of our scholars. Moreover, Great Hearts believes that the above mentioned structure will allow staff, families, and the broader Lake Charles community, to engage the Directors at the committee level for a granular perspective to streamline the governance process and attempt to problem-solve from the ground up.

30. Great Hearts Louisiana aims to meet all operational expectations and indicators, as evidenced through site visits and data submissions and reviews, inclusive of the following areas: special education and ELL program, student enrollment, student discipline, health and safety, governance, facilities, Title I and other Federal Programs, and student information systems and state mandated data reporting. Great Hearts aims to achieve an operational performance rating of “meets all expectations” by demonstrating proficiency of all expected annual organizational compliance indicators, as detailed below.

Indicator	Standard Expectation	Great Hearts’ Annual Goal
<i>Enrollment</i>	<i>Schools enroll and serve all students through prioritizing equity in their enrollment and discipline policies and procedures.</i>	
Required Percentages of Economically Disadvantaged Students	Meets required percentage.	58% or greater
Required Percentages of Students with Disabilities	Meets required percentage.	8.5% or greater
Re-Enrollment of Students	More than or equal to 80% of students return.	Re-enrollment rate of 85% or greater
Suspensions	At or below the National Average. School is not on the Urgent Intervention Required (UIR) List for Discipline.	Suspension rate of less than 3% for K-4th and less than 10% for 5th-12th School is not labeled UIR-Discipline
Recruitment, Lottery and Other Enrollment Policy and Procedures	School receives no Notice(s) of Concern nor Notice(s) of Breach relative to Student Enrollment Practices.	No Notices of Concern nor Notices of Breach.
Student Records and Other State Required Data Reporting (inclusive of PEP and other Student	School receives no Notice(s) of Concern nor Notice(s) of Breach relative to Student Records and Data Reporting	No Notices of Concern nor Notices of Breach.

Information Systems Requirements)	in the District's Student Information Systems Portal.	
School is nondiscriminatory and compliant with laws and policies related to student admissions, discipline, attendance and truancy	Meets laws, policy and contract terms relative to admissions, discipline and attendance. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.	Meets laws, policy, and contract terms. No Notices of Concern nor Notices of Breach.
School Admissions Process is nondiscriminatory and compliant with laws and policies related to students with disabilities	Meets laws, policy and contract terms relative to admissions, discipline and attendance. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.	Meets laws, policy, and contract terms. No Notices of Concern nor Notices of Breach.
<i>Special Populations</i>	<i>All special student populations receive the services and supports they need to ensure academic success in accordance with applicable law and policy.</i>	
Students with Disabilities Evaluations	Less than 5% of evaluations out of compliance.	0% of evaluations out of compliance
IEP Timeline Compliance	Less than 5% of evaluations out of compliance.	0% of evaluations out of compliance
Least Restrictive Environment	Over 60% of total students with disabilities population meets measure.	Over 80% of total students with disabilities population meets measures
Subgroup Performance	School has been identified as "Urgent Intervention Required" in no more than two reported subgroups.	School is not identified as UIR in any subgroup.
Economically Disadvantaged & Federal Programs	Favorable monitoring checklist reports from district Title I monitor. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to Title I and Other Federal Programs implementation.	Favorable monitoring checklist reports. No Notices of Concern nor Notices of Breach.
All student populations receive the services and supports they need to ensure academic success in accordance with applicable law and policy	Meets law and policy requirements regarding special student populations. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.	Meets laws and policy requirements. No Notices of Concern nor Notices of Breach.
<i>Law and Policy</i>	<i>Schools and governing boards responsibly follow all laws, policies and contractual obligations</i>	
Board adheres to state policies regarding governance and compliance	No evidence of non-compliance with state or federal governance policies	No evidence of non-compliance.

	<p>including but not limited to the following: open meeting laws, public records act, public bid laws, fire and safety laws, health laws, board structure requirements, etc. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.</p>	<p>No Notices of Concern nor Notices of Breach.</p>
<p>School and board have no evidence of violations of Louisiana Ethics Laws</p>	<p>No evidence of non-compliance with the Louisiana Code of Governmental Ethics. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.</p>	<p>No evidence of non-compliance. No Notices of Concern nor Notices of Breach.</p>
<p>School and board have no evidence of violations of legal and contractual obligations</p>	<p>No evidence of significant, intentional or repeated non-compliance of legal and contractual obligations. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.</p>	<p>No evidence of non-compliance. No Notices of Concern nor Notices of Breach.</p>
<p>School has no evidence of violations of required test procedures</p>	<p>No evidence of non-compliance with state testing policy and/or local test security policy; district investigation found evidence of cheating by school staff and/or significant or repeated violations of district or state testing policy. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.</p>	<p>No evidence of non-compliance. No Notices of Concern nor Notices of Breach.</p>
<p>Board adheres to BESE approved state policy Bulletins (such as but not limited to Louisiana handbook for school administrators; promotion and placement; statewide assessment practices; accountability standards, etc.)</p>	<p>No evidence of non-compliance with the Louisiana state law, state policies and/or applicable local policies. School receives no Notice(s) of Concern nor Notice(s) of Breach relative to these areas.</p>	<p>No evidence of non-compliance. No Notices of Concern nor Notices of Breach.</p>

<p>Louisiana Government Budget Act (LGBA) / Bulletin 126 Compliance</p>	<p>Great Hearts Harveston's 2023–24 Annual Audit identified a finding: expenditures exceeded the approved budget by >5%, requiring a budget amendment that was not timely completed. The overage resulted from the LPCSP Grant received in January 2024, which was not reflected in the original approved budget. Remediation steps have been completed. See Question 42 for full disclosure and remediation detail.</p>	<p>Full compliance with LGBA budget amendment requirements. Timely amendments filed whenever revenues or expenditures are projected to exceed the 5% threshold.</p>
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31. A dashboard will be leveraged to monitor the academic, organizational/legal, and financial goals of Great Hearts Lake Charles. The dashboard will contain data that measures the current performance of the schools against the goals that will be identified in a short-term, mid-term, and long-term Strategic Plan. The dashboard will be updated monthly to allow the Directors, in conjunction with the Executive Director and Head of School, to anticipate trends that are projecting inconsistent with our anticipated outcomes. The dashboard will also allow Great Hearts to identify performance gaps early and prompt the Directors to begin to mobilize additional resources or supports to close the performance gaps. Additionally, the dashboard will allow our scholars, staff, families, and community members to see the steps being taken by the Directors and head of schools so that they may “plug in” as partners to not just meet the goals but exceed them.

In the instance that the school is trending toward not meeting goals, the Directors will meet to: (1) Identify trends in the data to understand why goals are not being met, (2) design an improvement plan with clear, specific, and mission-aligned goals, (3) consider board expansion to ensure sufficient expertise, and (4) implement a monitoring and accountability system to track milestones aligned with the larger improvement goals. Should the board not see sufficient progress, they will take action with difficult decisions such as changes to leadership.

32. a, b, c. As mentioned above, a dashboard will be created to monitor the ongoing progress of the school. Regarding renewal standards, the Directors will begin to engage the Executive Director and head of school at least twelve months before the charter contract is scheduled to be evaluated for renewal. If the dashboard indicates that renewal is not likely, the Directors will convene an ad hoc Accountability Committee tasked with developing tactics and strategies to maximize GHLA’s chances of a successful renewal. Furthermore, the Accountability Committee will likely work simultaneously with the Community Engagement/Outreach Committee to ensure that community stakeholder perspective is received and potentially implemented in the renewal plan. The board regularly monitors the performance of each school using a range of metrics, including evaluation of disaggregated student performance outcomes on state assessments. The board meets six times a year (and in some instances monthly). Further, the board reviews college enrollment, persistence, and degree attainment data of its graduates to ensure that

Great Hearts continues to prepare students for rigorous postsecondary learning. The board selects, manages and evaluates the Executive Director of Great Hearts Louisiana.

33. a. Great Hearts Lake Charles will leverage the Great Hearts America Director of Finance for Louisiana, Holly Manuel, to implement financial management and accounting for the school. To ensure financial health of the school and legal compliance with requirements and restrictions for the use of public funds, Ms. Manuel will implement the following practices for financial planning, accounting, purchasing, and payroll.

Dedicated campus leadership, including the head of school and Director of Finance, will manage financial planning, accounting, purchasing and payroll, with the support of Great Hearts America's national team, which includes a veteran Chief Financial Officer and highly qualified staff, under the oversight of the board of directors of Great Hearts Louisiana. The Great Hearts Louisiana board will meet regularly and will review the Great Hearts Lake Charles regional and school-level financial performance; it will also have a finance committee to provide additional financial oversight.

Financial Planning, accounting, purchasing, accounts payable and payroll will be conducted under the supervision of Great Hearts America's national team and in accordance with all applicable Louisiana state requirements so as to: properly segregate duties; maintain strict internal controls; avoid the improper mingling of funds; honor all financial obligations; ensure that payroll is consistent and timely; use funds in strict accordance with restricted and unrestricted purposes; and ensure the short- and long-term financial well-being of the Great Hearts Lake Charles region.

Financial Position. The Great Hearts Louisiana Board will be trained on state financial and charter governance requirements so that it can uphold its fiduciary responsibilities in accordance with all applicable state statutes and LDOE rules. The Board will exercise its oversight responsibilities by regularly reviewing financial statements, requesting additional information as needed to monitor and understand the organization's financial position, and scrutinizing the financial statements including, when needed, bank account reconciliations. The Board will approve the annual budget, all expansion requests and related financing of such along with purchases made above certain thresholds defined in its policies. The Board will have the right to select the auditor, provide input into the audit, and review the annual audited financial statements.

33. b. Great Hearts Louisiana will hire a School Business Administrator dedicated to the Lake Charles campus. This position will be filled based on demonstrated qualifications set forth in a job description that includes finance, accounting, and compliance expertise relevant to Louisiana public school operations. The School Business Administrator will work under the oversight of the Great Hearts Louisiana Director of Finance and the Great Hearts Louisiana board.

The Board will utilize the following fiscal controls and financial management policies to remain informed regarding the network's financial position:

- Financial policies & procedures manual: Management will prepare, and the Board will review and approve, Great Hearts Lake Charles's financial policies and procedures manual. The manual will be implemented, periodically reviewed, and updated so as to ensure that there is adherence to a clear standard of practice within defined non-profit accounting and resource-management parameters.

- Expert Network Support: Great Hearts America's financial leadership will review monthly results and discuss with the Great Hearts Louisiana Finance team and appropriate management. Necessary corrective actions will be created and implemented.
- Review of quarterly financial statements: The Board reviews financial statements monthly, including a balance sheet, income summary, quarterly actual-to-budget comparison, statement of cash flows and financial forecast.
- Routine Finance Committee Meetings: The Board Treasurer and Finance Committee will meet regularly with the CFO, the finance team, and other school and network leaders to review financial records, including the most recent reconciliation of accounts and budget-to-actual variance reports. Statements will be sent to the Board on a regular basis.
- Annual budget approval: The Board reviews and approves the school's annual budget each year as described above.
- Audit compliance: The Board works with the finance team and has hired an external auditor to ensure that an annual audit is completed in accordance with all applicable state requirements. The Board Treasurer, with the support of the CFO and network team, prepares management's response to each audit finding.

34. New board members are carefully vetted in a multifaceted screening process. They receive orientation regarding the Great Hearts academic model, accountability measures, school policies, and family and staff engagement. In compliance with Louisiana state regulations, all board members annually complete a 1-hour training program offered by the Louisiana Board of Ethics to stay current on conflicts of interest rules. Additionally, each board member submits a Tier 3 Financial Disclosure Statement that identifies their personal financial information from the previous year.

35. The board convenes in public session six times a year. The Corporation and the Board will comply in all respects with the Louisiana Open Meetings Law and Open Records Act. The Governing board bylaws specify the following processes and procedures to ensure compliance:

- Public Notice of Meetings: Public notice of all meetings of the Board, of the Executive Committee, of the Member (when transacting business concerning the Corporation) and of all committees authorized by the Board (collectively, the "Applicable Meetings" and singly an "Applicable Meeting") will be given pursuant to and as required by the Louisiana Open Meetings Law - La R.S. 42:11, (referred to as the "Open Meetings Law"), for so long as the Open Meetings Law applies to charter schools. Notice of all the Applicable Meetings, except as otherwise provided by state law, regulation, the Articles of Incorporation, or these Bylaws, will be posted as described below at least 24 hours before the time of the meeting, pursuant to La R.S. 42:19(A)(1)(b)(i).
- Posting of Notice: Notice to the public of any Applicable Meeting will be posted at the Corporation's administrative offices in a location convenient to the public at least 24 hours before the time of such meeting.
- Emergency Notice: Emergency meetings as may be allowed under the Louisiana Open Meetings Law shall be posted up to 24 hours before the meeting.
- Internet Posting: Notice and the agenda of all meetings of the Board of Directors will also be posted on the Corporation's internet website, if any, concurrently with the notice posted at the Corporation's administrative offices, or as otherwise required and authorized by the Louisiana Open Meetings Law.
- Agenda: At each regular meeting of the Board, the Board will establish the order of business in an Agenda approved by the President and as presented in the notice of the meeting. However, the President may modify the order of business. The agenda will identify all matters to be presented to and considered by the Board. Matters not

disclosed in the agenda and the meeting notice available to the public will not be deliberated or be considered by the Board, except as permitted by the Louisiana Open Meetings Law, if any.

See Appendix 6: Governing Board Bylaws

FINANCIAL PLAN AND CAPACITY

Operational Management and Leadership

36. Great Hearts’ application team has robust qualifications for successfully implementing our Operations Plan, including capacity in the areas of: staffing, professional development, performance management, general operations, and facilities management. See the table below for more information regarding our team qualifications:

Name	Title	Specific Area of Expertise	Qualifications
Daniel Scoggin	Co-founder	General Operations	20+ years leadership at Great Hearts, 12+ years as teacher and leader outside of Great Hearts
Jake Tawney	Chief Academic Officer	Professional Development, Performance Management	11+ years leadership at Great Hearts, 17+ years as teacher and leader outside of Great Hearts
Jerilyn Olson	Chief People Officer	Staffing, Professional Development	20+ years teaching and leadership at Great Hearts
Helen Baxendale	Chief of Staff	Performance Management, General Operations	4+ years leadership at Great Hearts, 9+ years teaching and leadership in higher education, 8+ years in public policy and consulting
Heather Washburn	Director of Accountability	Performance Management	14+ years teaching and leadership at Great Hearts
Tom Doebler	Director of Special Student Services	Professional Development	14+ years leadership in SPED at Great Hearts, 6+ years SPED services outside of Great Hearts
Holly Manuel	Director of Finance	General Operations	2+ years leadership at Great Hearts, 13+ years corporate finance
Bianca Ulibarri	Director of Governance	General Operations	5+ years leadership at Great Hearts, 8+ years leadership at Arizona Charter Schools Association
Dana Henry	Legal counsel	General Operations	4+ years Senior Counsel at Schulman, Lopez, Hoffer & Adelstein; 10+ years other legal roles; 7+ years public education advocacy roles

Ty Gose	Board Chair, GHLA	Facilities Management	Business/Economics Degree; Top Producer and Division Leader at Latter and Blum
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37. Operational Management and Leadership

- **Transportation:** Great Hearts will outsource transportation by contracting with an external transportation company to provide service to and from school. Transportation will be managed by front office personnel to include but not limited to selecting the transportation provider, working with the provider to create bus schedules and bus stops, ensuring customer service from the provider to all families and children. Working in conjunction with the Head of School and Director of Finance, the campus Director of Operations will contract and oversee the transportation company, in alignment with the Procurement Policies and Procedures as approved by the Board. Transportation plans will be designed to meet the needs of all children, including economically disadvantaged students and students with disabilities. Bus routes and communication to families about access will carefully consider and serve the needs of low-income families and families with students with disabilities.
- **Food Service:** To be provided by a caterer who will provide the National School Lunch program to ensure students have opportunity for breakfast and lunch. The caterer will cover all reporting for the school lunch program
- **Facilities:** To be maintained by a facility tech who will be responsible for building maintenance, managing all local building contract services, (for example, lawn and tree service, air conditioning service, any building project management).
- **Purchasing/AP-Purchasing:** To be done primarily by the Director of Operations with managerial oversight and support from GHA, and when the purchase is above defined thresholds in policy, purchases will also require board approval. Using our approved vendors, the Director of Operations will assist teachers and administration in ordering supplies. Once invoices arrive at the school, they will be processed by the OM in our automated accounts payable system. Once approved, the invoice will be paid.
- **Student Records:** The Director of Operations’ responsibility is to collect, maintain, and ensure all required documents have been collected from the families and current. All student record files are maintained and stored in a locked cabinet.
- **School Safety/Security:** The school will use the Raptor School Security system that will monitor and background check all people entering and exiting the building. The system also manages the volunteers from background checks to entry in and out of the building. The third module manages the evacuation and reunification of students and families in the event of an evacuation. The school will complete an Emergency Operations Manual written specifically for the school site detailing all emergency procedures and appointing specific duties for school personnel. The safety procedures will be monitored by a Facilities Support Staff, under the supervision of the Head of School.

Student Enrollment and Recruitment

38. The target student population for Great Hearts Lake Charles schools is an ethnic and economic mix of children, including English learners and students with disabilities. In full compliance with Louisiana R.S. 17:3991(B)(3)(a)(i), Great Hearts Lake Charles will be an open-enrollment, tuition-free public school that admits all students through a random lottery when applications exceed available seats. No student will be denied admission based on academic performance, language proficiency, disability status, or family background. To ensure that families from all backgrounds are aware of and have equal access to the application process, Great Hearts will implement a multifaceted recruitment approach that

combines broad marketing with direct grassroots engagement. Beginning in September of the year before opening, Great Hearts will launch high-level marketing efforts that include earned media (public relations), digital advertising (social media and streaming ads), direct mail (letters and door hangers), print ads (local publications and newspapers), and billboards. These strategies will ensure awareness across all neighborhoods of Lake Charles, including racially and socioeconomically diverse areas.

At the same time, Great Hearts will allocate significant staff and financial resources toward in-person outreach. Starting in October, Great Hearts will host introductory town halls, “meet the leader” nights, and open houses at the school site. Recruitment teams will table at neighborhood hubs such as the MLK Community Center, Ward 3 Recreation Center, and Drew Park Center, and partner with local churches including Greater St. Mary Missionary Baptist Church, First United Methodist Church of Lake Charles, and St. Margaret Catholic Church. Early childhood centers across the parish and civic partners such as the Southwest Louisiana Economic Development Alliance, the Imperial Calcasieu Human Services Authority, and the Kiwanis Club of Lake Charles will also be engaged. These efforts will extend into North, Central, and South Lake Charles to reach the full diversity of the community.

The application itself will be accessible both online and on paper, available in English, Spanish, and other languages as needed. Parents can submit applications from any internet-connected device, including cell phones, and will not be required to appear in person, eliminating transportation barriers. The enrollment window will remain open for several months, giving families with varying work schedules ample opportunity to apply.

For families requiring additional support, Great Hearts will provide translation services, technology access at the school site, and connections through community partners such as Calcasieu Parish Public Library branches and McNeese State University’s community outreach programs. These measures ensure that every family, regardless of language, technology access, or socioeconomic status, has equitable access to the enrollment process.

Lottery. If a lottery is required, the Great Hearts lottery will be conducted by the school’s Director of Operations and will be hosted publicly for full transparency; parents may attend the lottery event. The lottery will be conducted per the enrollment preferences that Great Hearts will use for enrollment, which are detailed below in order of priority:

1. Siblings of current Great Hearts students
2. Children of Great Hearts employees and staff members

The submitted application will indicate if the applying student qualifies for any of the aforementioned enrollment preferences. The first lottery round will consist only of the applicants who qualify for the first preference; each student applicant will be issued a corresponding number, ensuring a blind lottery. The lottery administrator will pull an application number for the specific grade level, one at a time, until all available seats have been filled or until there are no student applicants remaining. If seats are still available after all applicants from the first preference have been pulled, the lottery administrator will conduct an identical lottery with the applicants who qualify for the second preference, again until all available seats have been filled or until no applicants with that priority remain. The lottery will continue in this manner through all preferences, and then through general applications.

In the event that there is a surplus of applications for any grade level, a waitlist will be created for that grade level. Students will be placed on the waitlist in the order of how their numbers are chosen via the lottery. The waitlist will be managed by the school site; parents may contact the

school directly to request to know where in line their child is on the waitlist at any time. Students will be admitted from the waitlist when a seat in the appropriate grade level becomes available, often due to a current student moving to a different school, district, or state, or to a new student selected during the lottery not accepting their seat or registering for the school.

After the lottery is held, all parents will be informed of their child's enrollment placement by the school. Students who were chosen, either via automatic admittance (if the number of applications did not exceed the number of available seats) or via the lottery, will then be asked to register. Great Hearts will communicate with all newly enrolling students by mail, email, and phone call, and will provide them detailed instructions on how and when to complete registration, offering assistance as needed. During registration, Great Hearts will collect documentation from families to verify residency and other pertinent information to ensure all students are enrolled appropriately.

To summarize, the timeline for all recruitment and enrollment activities will be as follows:

September (Year Before Opening)

- Launch marketing: PR, digital ads, mailers, print, billboards

October – Onward

- Outreach: town halls, open houses, community centers, churches, civic partners

Application Window (Fall–Winter)

- Applications: online & paper, multilingual, mobile-friendly, open for months

Support

- Translation, tech at school, library & McNeese partnerships

Lottery (Spring, if needed)

- Public, transparent
- Priority: siblings → staff kids → general
- Waitlist created if seats full

Post-Lottery & Registration

- Families notified by mail/email/phone
- Registration help provided
- Collect residency & required docs

Financial Plan

39. Great Hearts America was recently awarded a federal Charter School Programs (CSP) grant of \$34M. Louisiana was awarded approximately \$6M of this total, with \$2M dedicated specifically to the startup of Great Hearts Lake Charles. Resources from the CSP grant will also support the Great Hearts America team to add additional personnel so that the new Lake Charles campus will receive expert start-up assistance.

40. A core component of financial planning is contingency planning. The contingency plan consists of: (1) budget development process; (2) finance committee oversight; (3) board budget review/approval; (4) budget review & analysis; (5) period budget revisions; and (6) budget crisis plan. In the event that the network is faced with a budget shortfall, the CFO of Great Hearts America, Director of Finance of Great Hearts Louisiana, and Finance Committee will meet to develop a budget shortfall and action plan. If the shortfall is projected to be significant, a budget

crisis plan may be implemented to ensure the integrity of academic programs remain intact. Budget crisis steps may include but are not limited to:

- Prioritizing mission critical expenses directly related to delivery of classroom instruction, including line items related to instructional contracted services, instructional supplies and equipment, and instructional personnel;
- Protection and use of reserves;
- Delay or deferment of large capital purchases;
- Reduction in non-essential expenditures not directly related to the delivery of classroom instruction including: non-instructional contracted services; non-instructional occupancy services; non instructional supplies and equipment; non-instructional miscellaneous products and services; and non-instructional personnel.

Financial planning also consists of budget management & oversight. Great Hearts Lake Charles will maintain a conservative approach to budgeting, maximizing revenue projections while minimizing expenses. When faced with optimizing costs, Great Hearts will consistently work to protect the organization's mission and maintain resources to most effectively deliver the academic program students need to succeed. The Head of School, Director of Operations, and Director of Finance will meet regularly to develop the annual operating budget, assess the school's budget-to-actual position, review the cash flow position, update forecasts and ensure that the appropriate accounting is being completed on a timely basis. In addition, the leadership of Great Hearts Louisiana will meet with the Board's Finance Committee regularly to approve the annual budget, review YTD results, variances, actions to be taken, forecasts, cash position and ensure on-going financial stewardship is occurring. Lastly, a financial package with timely, high quality financial statements, in compliance with GAAP and applicable Louisiana laws, will be issued and presented at regular board meetings.

The initial step in the budget development process is to analyze the projected variances in revenue and expense in the current fiscal year. Once those variances have been analyzed, the GHA CFO, Director of Finance, and school leadership develop next year budget targets, which will meet the network's academic goals for the upcoming school/fiscal year. The targets and related assumptions are reviewed, first with the Finance Committee and then reviewed and approved by the entire board. Once targets have been agreed upon, then detailed budgeting can take place to align with the targets. Through the use of the targeting approach, less time is spent on the budget as funding decisions are discussed and agreed to upfront. This approach avoids the process of submitting a wish list budget only to have to turn around and make cuts. The target approach represents a more strategic way to budget and ensure that the valued investment discussion occurs at the beginning of the process.

The CFO, Director of Finance, and school leadership also work together to ensure that there are no fiscal year operating budget deficits. Should there be a year where revenues are projected to decrease, the CFO, the finance team, and school leadership work together in the target setting process to make the appropriate adjustments to the operating costs to ensure school and organizational solvency. The Board's Finance Committee works closely with the CFO to review and approve proposed actions in cases where revenues would be projected to decrease.

41. The Director of Finance will oversee budgeting, compliance, and internal controls to ensure the school's financial operations are managed with expertise and transparency, under the oversight of the GHA CFO and GHLA Board Finance Committee. Great Hearts Lake Charles will maintain a conservative approach to budgeting, maximizing revenue projections while minimizing expenses. When faced with optimizing costs, Great Hearts will consistently work to

protect the organization’s mission and maintain resources to most effectively deliver the academic program students need to succeed.

See Appendix 7: Financial Manager Resume

42. Great Hearts Harveston’s 2023–24 Annual Audit identified a finding related to compliance with the Louisiana Government Budget Act (LGBA) and BESE Bulletin 126. Expenditures exceeded the approved budget by more than 5%, which triggered a requirement for a budget amendment that was not timely completed. The overage resulted from an unanticipated revenue source—the Louisiana Pre-K CSP (LPCSP) Grant received in January 2024—that was not reflected in the original approved budget. Remediation steps have been completed. Great Hearts Louisiana has implemented revised internal procedures to ensure that budget amendments are filed promptly whenever revenues or expenditures are projected to exceed the 5% threshold required under LGBA, and that new grant awards are reflected in approved budget amendments prior to expenditure.

43. a, b. The following is an outline of the primary components of the budget-management process:

Budget Approval: Great Hearts will ensure transparency throughout the budget process by following all applicable laws and statutes as it relates to allowing for public comment and input prior to board approval of the budget. The proposed budgets will be available for public review at the school site prior to approval by the Board. The Director of Finance presents the proposed budget to the full Board for approval at the May/June board meetings. The full board reviews the proposed budget to ensure it is in line with its goals/targets for the network. The Director of Finance and the Finance Committee address questions from the full Board. There is also time allotted for public questions and comments. If no modifications are required, the Board will reconvene for final approval in accordance with the Louisiana Government Budget Act. If modifications are required, the Director of Finance will make the required changes and present any material impacts to the Finance Committee prior to the Board reconvening for final budget approval.

Budget Review & Analysis: Prior to each board meeting, the finance team presents the monthly financial statements to school leadership and the Finance Committee. The finance team will provide detailed explanations for all significant budget variances on the income statement and related actions. The finance team will address questions from the Finance Committee.

43. c. N/A. Great Hearts Lake Charles is not a virtual campus.

See Appendix 8: Insurance Coverage

HIGH SCHOOL ADDENDUM

HSA.1. In addition to core content offerings and graduation requirements, Great Hearts Lake Charles will offer additional courses in Foreign Languages (Latin, Greek, French, Spanish), Fine Arts (choral music, studio art, drama), and a Senior Thesis. These offerings reinforce the school's classical, liberal arts mission by cultivating language, reasoning, and artistic expression while fostering character and teamwork.

HSA.2. Great Hearts Lake Charles will align with the TOPS University Diploma pathway (college preparatory). Great Hearts will not offer Jump Start 2.0 pathways.

HSA.2.a. The course of study in grades 9-12 at Great Hearts Lake Charles ensures completion of all Louisiana requirements within four years (or five for transitional 9th graders). The graduation plan requires 24.75 units, exceeding the state's 24-unit minimum.

HSA.2.b. Great Hearts' rigorous liberal arts curriculum prepares students for selective postsecondary opportunities. Our carefully curated model has a proven record of college acceptance across the national network. Of the graduating class of 2025, 91% went on to attend college immediately, with 51% pursuing a STEM degree. Recent reports from the Arizona Board of Regents find that Great Hearts Arizona academies have among the highest college matriculation and college completion rates of all Arizona high schools.

2. c, d, e. All Great Hearts students default into the college-prep TOPS University diploma. If demand for Jump Start pathways arises, the school may partner with local districts and organizations to expand options. All students are assigned college admissions counselors who guide diploma completion, applications, and scholarships. All students will have access to the required courses and supports to graduate with the TOPS University Diploma.

HSA.3. Available AP coursework and Dual Enrollment includes the following. These courses were carefully selected to align with Great Hearts' classical school model and in alignment with the core course offerings and K-8 programming at Great Hearts.

Grade Level	Available AP Exam	Available Dual Enrollment
12	Calculus AB	French IV
	Calculus BC	German IV
	English Literature & Composition	Greek II
	Physics I	Humane Letters IV
	Physics II	Calculus II
	World History: Modern	American Rhetorical Tradition
		Logic & Computation
	Physics II	
11	English Language & Composition	Calculus I

	Precalculus	French III
		Spanish III
		German III
		Greek I
		Humane Letters III
		Physics I
10	Chemistry	Algebra II/Pre-Calculus
	European History	Latin V
	Latin	Chemistry
	Macro/Micro Economics	Economics
		Humane Letters II
9	Biology	
	US History	

Great Hearts offers ACT Prep courses in grades 11 and 12. These courses are part of the college counseling series and not credit-bearing but ensure readiness for ACT/college admissions.

Great Hearts will not offer CTE or IB courses.

HSA.4 Great Hearts will not offer Jump Start 2.0 pathways or IBCs at opening. The school is designed as a college-preparatory liberal arts academy. If community demand emerges, the school may partner with local organizations to add career-aligned pathways.

HSA.5 Great Hearts focuses on college preparation, not apprenticeships or cooperative education. However, the school commits to exploring community partnerships to expand options if student demand arises.

HSA.6 Great Hearts will create a safe, welcoming, supportive environment. Systems include daily attendance tracking, assigning mentors, restorative practices instead of punitive discipline, academic tutoring, and counseling/health referrals. Teachers, counselors, mentors, families, and community organizations collaborate to provide individualized support plans to prevent dropout.

CORPORATE PARTNERSHIPS ADDENDUM

N/A. Great Hearts Lake Charles is not pursuing corporate partnerships.

Assurances Form

Please provide your assurances to the following items. Your responses serve as an attestation to fulfilling the following provisions if the application is approved.


If the answer to any item below is “No”, please submit a statement of explanation as an attachment.

ASSURANCES		YES	NO
1	The school and/or charter board is organized as a nonprofit corporation under Chapter 2 of Title 12 of the Louisiana Revised Statutes, Nonprofit Corporation Law.	✓	
2	The school and/or governing organization is currently registered as a nonprofit corporation and is listed as in good standing with the Louisiana Secretary of State.	✓	
3	The school is not affiliated with any religious organization and does not support nor engage in any religious activities.	✓	
4	The school and/or governing organization does not have any liens, litigation history, and/or sanctions from any local, state, and/or federal regulatory agency against the nonprofit corporation.	✓	
5	The school and/or governing organization does not have the same or substantially the same board of directors and/or officers as an existing private school.	✓	
6	The school does not draw a substantial portion of the employees from an existing private school.	✓	
7	The school does not receive a substantial portion of assets or property from an existing private school.	✓	
8	The school is not located at the same site as an existing private school.	✓	
9	The school will not create barriers of access to enrollment in accordance with <i>Brumfield v. Dodd</i> , 405 F. Supp. 528 (E.D. La. 1977).	✓	
10	The school will provide free transportation to students as stipulated in the Charter Operating Agreement.	✓	
11	The school charter includes provisions regarding the safety and security of the school.	✓	
12	The school charter includes provisions regarding the inspection and operation of all fire prevention and safety equipment at the school.	✓	
13	The school charter includes a plan for collecting data in accordance with R.S. 17:3911.	✓	
14	The school charter includes personnel policies and employment practices applicable to the school's officers and employees.	✓	
15	The school charter includes provisions regarding liability issues.	✓	
16	The school charter includes employee grievance processes and policies.	✓	
17	(Beginning August 1, 2024) Each president of a BESE authorized charter board shall participate in at least one hour of board governance, special education, and financial management training within one year of assuming the role.	✓	
18	(Beginning June 1, 2025) Each new member of the board of directors of a BESE authorized	✓	

	charter operator shall participate in at least one hour of board governance, special education, and financial management training within one year of appointment to the board.		
19	The charter school will ensure fiscal responsibilities per R.S. 17:3981.	✓	
20	Charter schools will follow applicable state laws regarding the completion of approved numeracy skills per LAC28:CXV.511, R.S. 17:24.13.	✓	
21	Charter schools will follow applicable state laws regarding the display of the national motto per R.S. 17:262.	✓	

Certification

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate, realizing that any misrepresentation could result in disqualification from the application process or revocations after award.

Name of Board Chair, Charter Governing Board: Ty Gose, Board Chair, Great Hearts Louisiana	
Signature of Board Chair: X  <small>Ty gose, Mar 26, 2026 16:58:38 CDT</small>	Date: Mar 26, 2026

Appendix 1: Evidence of Community Support

Evidence	Page Number	Description
Student Interest List	pp. 73-82	Redacted list of 234 students/parents/families interested in enrolling in Great Hearts Lake Charles
Family Engagement event sign in list	p. 83	List of attendees (last names redacted) of four (4) family engagement events
Letter of Support: Erin Franco	pp. 84-85	A letter of support from a Great Hearts Harveston parent and current Great Hearts Louisiana Board Member
Letter of Support: Jeremy Wayne Tate	p. 86	A letter of support from the founder and CEO of Classic Learning Test
Letter of Support: Patrick Martin	pp. 87-88	A letter of support from a Great Hearts Harveston parent and District 9 Board member in East Baton Rouge
Letter of Support: David Whidden III	pp. 89-90	A letter of support from Vice President of Mission and Professor of Theology at Franciscan Missionaries of Our Lady University, and current Great Hearts Louisiana Board Member
Letter of Support: Blake and Lori Grundy	p. 91	A letter of support from former Lake Charles residents and current Great Hearts Harveston parents
Letter of Support: Rev. Dr. Henry J. Mancuso	p. 92	A letter of support from a Lake Charles pastor, educator, and community volunteer
Letter of Support: Joshua Brown	pp. 93-94	A letter of support from the Director of the Governor's Program for Gifted Children

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
1			2/27/20	M Westley			ast***80@gmail.com	
2			11/3/22	A Evins			aal***ns@gmail.com	
3	Parent	LC Interest List	12/7/22	V McIntyre	2nd	1	rhs***ck@gmail.com	70601
4			3/17/23	P Braccini Braccini			don***81@gmail.com	
5			3/10/25	A Bakker			zek***r5@gmail.com	
6			7/28/25	D Robinson			dot***on@hotmail.com	
7			7/28/25	D Tutson			dan***on@yahoo.com	
8			7/28/25	R Manuel			jrm***l4@att.net	
9			7/28/25	A Ardoin			ale***in@outlook.com	
10			7/28/25	S Brown-Hazel			lov***rd@yahoo.com	
11			7/28/25	G Rafique			gha***04@yahoo.com	
12			7/28/25	L Antoine			lac***ne@yahoo.com	
13			7/28/25	L Barron			lei***ge@yahoo.com	
14			7/28/25	B Hughes			kyt***07@gmail.com	
15	Parent	LC Interest List	7/28/25	J Penney			jen***27@gmail.com	
16			7/28/25	G Malveaux			gab***ux@gmail.com	
17			7/28/25	J Leleux			jul***dl@yahoo.com	
18	Parent	LA Interest List	7/15/25	Q Berry	3rd	1	qua***ry@yahoo.com	70601
19			7/28/25	D Tate			deb***37@aol.com	
20			7/28/25	L Williams			lin***86@gmail.com	
21			7/28/25	L Matthews			mlla***ta@yahoo.com	
22	Parent	LA Interest List	7/22/25	J Lee Dupre	Kinder, 1st, 2,d 3rd	4	jes***re@gmail.com	70615-3414
23			7/28/25	V Nelson-Williams			ver***74@gmail.com	
24			7/28/25	H Mancuso			man***ry@gmail.com	
25			7/28/25	K Artis-Armelin			kim***is@gmail.com	
26			7/28/25	M Ardoin			ard***e7@gmail.com	
27			7/28/25	V Caesar			cae***a4@gmail.com	
28			7/28/25	J Corder			jul***er@aol.com	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
29			7/28/25	R Brandon			rob***@robandso.com	
30			7/28/25	D Keith			soc***08@gmail.com	
31			7/28/25	E Tarver			eri***@lakecharlestoyota.com	
32			7/28/25	M Free			mic***ee@outlook.com	
33			7/28/25	T Stallion			tst***er@gmail.com	
34	Parent	LC Interest List	7/28/25	M Griffin			mea***85@gmail.com	
35			7/28/25	A Guillory			ama***ry@ymail.com	
36	Parent	LC Interest List	7/28/25	S Murphey			sam***ey@hotmail.com	
37			7/28/25	J White			umn***za@gmail.com	
38			7/28/25	A Furman Doucet			adr***88@gmail.com	
39			7/28/25	C Su			che***u3@gmail.com	
40	Parent	LC Interest List	7/28/25	N Zeigler			nas***dt@yahoo.com	
41			7/28/25	D Cason			deb***94@gmail.com	
42			7/28/25	K Reddin			kat***05@gmail.com	
43			7/28/25	B Jones			bri***93@gmail.com	
44			7/28/25	L Findley			lin***14@gmail.com	
45	Parent	LC Interest List	7/28/25	R Shepherd			pig***ly@gmail.com	
46	Parent	LA Interest List	7/28/25	R Winstead	1st, 5th	2	win***ah@gmail.com	70607
47	Parent	LA Interest List	7/8/25	M Touchet	K, 1st, 2nd, 3rd, 4th, 5th	6	mia***on@yahoo.com	70605
48			7/30/25	J Luquette			ima***on@gmail.com	
49	Parent	LC Interest List	8/14/25	M Anne Daigle	Kinder, 1st, 2nd, 9th, 10th	5	mic***le@yahoo.com	70601
50	Parent	LC Interest List	8/14/25	S Bellard	2nd, 7th, 10th	3	msg***81@gmail.com	70605
51	Parent	LC Interest List	8/14/25	A Medrano			arm***64@gmail.com	
52			8/14/25	J Brown			jen***ab@gmail.com	
53			8/14/25	K Castaneda			kal***t8@gmail.com	
54			8/14/25	L Jacobs			lil***22@gmail.com	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
55			8/14/25	B Young			cro***11@gmail.com	
56			8/14/25	C Romero			che***an@gmail.com	
57			8/14/25	S Williams			sha***ly@gmail.com	
58			8/14/25	R Ceasar			ric***s3@aol.com	
59			8/14/25	K Kowalski			kim***ki@icloud.com	
60			8/14/25	C Duhon			chr***on@bellsouth.net	
61			8/14/25	D Lewis-Weston			drl***65@yahoo.com	
62			8/14/25	R Tommasi			rac***si@aol.com	
63			8/14/25	D Fleming			dfi***31@gmail.com	
64			8/14/25	T Perkins			tam***44@yahoo.com	
65	Parent	LC Interest List	8/14/25	J Barach	7th	1	jba***ch@aol.com	70605
66			8/25/25	S Rivera			rag***44@gmail.com	
67			8/25/25	W Lynch			msu***ch@gmail.com	
68			8/25/25	K Deshotels			kat***15@yahoo.com	
69	Parent	LC Interest List	8/25/25	T Dennis-Rayford (and Stephen)			srt***09@aol.com	
70	Talent	LC Interest List	8/25/25	T Truitt			ter***15@gmail.com	
71			8/25/25	H Chimeno			chi***87@gmail.com	
72			8/25/25	C Capps			cha***ps@yahoo.com	
73			8/25/25	G Ghjj			ghh***78@ghjk.com	
74			9/15/25				ale***10@gmail.com	
75			9/15/25				ebo***ry@gmail.com	
76			9/15/25				jdb***ne@gmail.com	
77			9/15/25				jlw***@rmwlegal.com	
78	Community	LC Interest List	9/15/25	L Fain			lwf***92@gmail.com	
79			9/15/25				mak***ot@gmail.com	
80			9/15/25				sha***22@tmail.com	
81			9/15/25				som***07@gmail.com	
82			9/15/25				woo***sr@gmail.com	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
83			9/15/25				hhh***uh@gmail.com	
84			9/15/25				dya***gh@icloud.com	
85			9/15/25				ion***23@gmail.com	
86			9/15/25	C Lucas			crr***09@gmail.com	
87			9/15/25	E Gauthreaux			eri***ux@gmail.com	
88			9/15/25	B Istre			ist***sy@gmail.com	
89			9/15/25	L Manuel			lac***el@gmail.com	
90			9/15/25	B Hopson			lil***th@me.com	
91			9/15/25	F Davis			kkk***q4@hotmail.com	
92			9/15/25	D Evans			fen***16@gmail.com	
93	Talent	LC Interest List	9/15/25	L Ross	Kinder, 1st	0	lor***22@gmail.com	70601
94			9/15/25	J Tyler Mounca			mou***er@gmail.com	
95			9/15/25	D Rogers			gre***75@gmail.com	
96			9/15/25	K Istre			kis***re@lakecharlescharter.org	
97	Parent	LC Interest List	9/15/25	E Davis			198***rd@gmail.com	
98			9/15/25	R Newman			ric***an@gmail.com	
99			9/15/25	G Tucker			glt***r8@gmail.com	
100			9/15/25	B Roberson			bri***n4@gmail.com	
101			9/15/25	E Lorden			eve***n0@gmail.com	
102			9/15/25				bra***lk@prepacademytutors.com	
103			9/15/25				kel***on@yahoo.com	
104			9/15/25				mjw***97@gmail.com	
105			9/23/25	A Thomas			mis***88@yahoo.com	
106			9/23/25	L Frutos			fru***12@yahoo.com	
107			9/23/25	J Haney			ele***97@msn.com	
108			10/6/25	D Moss			die***ss@aol.com	
109			10/6/25	P Gripp			gri***ia@yahoo.com	
110			10/6/25	A Fontenot			arm***ot@gmail.com	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
111	Parent	LC Interest List	10/6/25	M Savage			mon***ge@yahoo.com	
112			11/18/25	T Rankin			lex***ia@gmail.com	
113			11/18/25	E Cooley			ela***ke@gmail.com	
114	Parent	LA Interest List	10/13/25	E Cutrera	Kinder, 2nd, 5th	3	esc***a1@gmail.com	70605
115	Parent	LC Interest List	12/18/25	N Thomas			nat***en@gmail.com	
116	Parent	LC Interest List	12/18/25	M Carrier			mar***th@gmail.com	
117	Parent	LC Interest List	12/18/25	J Alexander			jad***ke@gmail.com	
118	Parent	LA Interest List	12/18/25	M Thomas	Kinder, 2nd	2	mar***30@gmail.com	770601
119	Parent	LC Interest List	12/18/25	F Snipes			gee***y3@icloud.com	
120	Parent	LC Interest List	12/18/25	S Ledet			ggl***97@gmail.com	
121	Parent	LC Interest List	12/18/25	R Thierry			rth***15@gmail.com	
122	Parent	LC Interest List	12/18/25	S Melanson			sne***38@gmail.com	
123	Parent	LC Interest List	12/18/25	K Soileau			kat***ux@yahoo.com	
124	Parent	LC Interest List	12/18/25	R Achane			kar***on@gmail.com	
125	Parent	LC Interest List	12/18/25	j harrison			led***ss@yahoo.com	
126	Parent	LC Interest List	12/18/25	T Dennis	2nd, 3rd	2	the***is@att.net	70601
127	Parent	LC Interest List	12/18/25	J Hartjen			jen***en@yahoo.com	
128	Parent	LC Interest List	12/18/25	K Land			kml***17@hotmail.com	
129			12/18/25	S Vallier			sla***00@gmail.com	
130	Parent	LC Interest List	1/9/26	K McGrady	2nd, 5th	2	kat***an@gmail.com	
131			1/9/26	S Burgin			sar***in@gmail.com	
132	Parent	LC Interest List	1/9/26	K Fontenot			ske***ll@proton.me	
133	Parent	1/13/2026 Event	1/9/26	C Clark			cou***23@gmail.com	
134			1/9/26	K Soileau			kat***au@yahoo.com	
135			1/9/26	S Bush			sst***29@aol.com	
136			1/9/26	K Clem			kat***a1@gmail.com	
137	Parent	LC Interest List	1/9/26	B Sonnier			bri***g9@msn.com	
138	Parent	LC Interest List	1/9/26	I Clark			kel***08@gmail.com	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
139			1/16/26	A Latigue			aer***ue@gmail.com	
140			1/16/26	A Sam			abr***am@yahoo.com	
141			1/16/26	T McGrady			tom***25@gmail.com	
142			1/16/26	C Carrington			chr***18@gmail.com	
143	Parent	LA Interest List	1/11/26	A Addison	1st, 4th, 10th, 11th	4	avi***on@gmail.com	70605
144	Parent	LC Interest List	1/16/26	H Ackoury			han***ry@gmail.com	
145	Parent	1/12/2026 Event	1/16/26	S McNabb			psm***ch@gmail.com	
146			1/16/26	F			ske***ll@proton.me	
147	Parent	1/12/2026 Event	1/16/26	L Barron			lba***51@wgu.edu	
148	Parent	1/12/2026 Event	1/16/26	J Shelvin Sr			gab***22@gmail.com	
149	Parent	1/12/2026 Event	1/16/26	N gomez pena campos			chi***dh@yahoo.com	
150	Parent	1/12/2026 Event	1/16/26	S Steward			she***29@gmail.com	
151	Parent	1/12/2026 Event	1/16/26	B Mason			bma***18@gmail.com	
152	Parent	1/12/2026 Event	1/16/26	A Bilbo			ama***bo@cpsb.org	
153	Parent	1/12/2026 Event	1/16/26	D Benevage			dar***36@gmail.com	
154	Parent	1/12/2026 Event	1/16/26	T Reed			tes***ed@yahoo.com	
155	Parent	1/12/2026 Event	1/16/26	A Biggs			arb***71@outlook.com	
156	Parent	1/12/2026 Event	1/16/26	O Jasmine			oct***as@gmail.com	
157	Parent	1/12/2026 Event	1/16/26	J & Nancy Friend			jof***nd@att.net	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
158	Parent	1/12/2026 Event	1/16/26	O Lewis			oma***is@gmail.com	
159	Parent	1/12/2026 Event	1/16/26	P Quebodeaux			pam***ux@att.net	
160	Parent	1/12/2026 Event	1/16/26	C Dargin			cda***84@gmail.com	
161	Parent	1/12/2026 Event	1/16/26	C Bilbo			bil***yn@gmail.com	
162			1/28/26				bgi***rt@johnsonfuneralhome.net	
163			1/28/26				mar***ge@gmail.com	
164			1/28/26				frp***en@outlook.com	
165	Parent	1/13/2026 Event	1/13/26	C Gibson			cay***on@gmail.com	
166	Parent	1/13/2026 Event	1/28/26	M Spears			rom***an@yahoo.com	
167	Parent	1/13/2026 Event	1/13/26	M Broussard			mdb***50@gmail.com	
168	Parent	1/13/2026 Event	1/13/26	C Hebert			che***14@gmail.com	
169	Parent	1/13/2026 Event	1/13/26	H Rashall			hla***er@gmail.com	
170	Parent	1/13/2026 Event	1/13/26	T Leeds			tar***ie@gmail.com	
171	Parent	LC Interest List	2/11/26	S Gardiner	1st and 4th	2	stg***yz@yahoo.com	70611
172	Parent	LC Interest List	2/11/26	T Clark	2nd and 3rd	2	tri***64@gmail.com	70663
173	Parent	LC Interest List	2/11/26	V Allen	Kinder, 1st	2	vha***16@gmail.com	70611
174	Parent	LC Interest List	2/11/26	K Ryder	1st, 2nd	2	kri***er@outlook.com	70605
175	Parent	LC Interest List	2/11/26	R Jackson	1st	1	rac***ix@yahoo.com	70611
176	Parent	LC Interest List	2/11/26	M Roberts	2nd	1	mkr***80@gmail.com	70601
177	Parent	LC Interest List	2/11/26	M Ortiz	3rd, 5th	2	mar***91@gmail.com	70663
178	Parent	LC Interest List	2/11/26	C McCabe	2nd and 4th	2	che***ff@gmail.com	70607
179	Parent	LC Interest List	2/11/26	K Barr	Kinder, 2nd	2	khe***ah@yahoo.com	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
180	Parent	LC Interest List	2/11/26	A Richard	Kinder, 1st	2	ann***13@hotmail.com	
181	Parent	LC Interest List	2/11/26	B Doyle			b.c***le@suddenlink.net	
182	Parent	LC Interest List	2/11/26	B Williams	1st	1	bry***98@gmail.com	70601
183	Parent	LA Interest List	12/24/25	A Doyle	9th	1	doy***le@gmail.com	70607-7644
184	Parent	LA Interest List	12/14/25	C Leday	9th	1	che***81@gmail.com	70607
185	Parent	LA Interest List	9/6/25	Y Smith	9th, 10th, 11th, 12th	4	ysm***04@gmail.com	70605
186	Parent	LC Interest List	2/24/26	O Antoine			bea***ga@gmail.com	
187	Parent + Talent	LC Interest List	2/24/26	C Menard	1st	1	cur***11@yahoo.com	70647
188	Parent	LC Interest List	2/24/26	L Pruitt	Kinder	1	lnm***98@gmail.com	70605
189	Parent	LC Interest List	2/24/26	K Roberson	1st	1	rob***ni@yahoo.com	70607
190	Parent	LC Interest List	2/24/26	C Smith	4th	1	gui***ey@yahoo.com	70601
191	Parent	LC Interest List	2/24/26	M Milligan	3rd, 4th	2	mea***18@gmail.com	70669
192	Parent	LC Interest List	2/24/26	K Leger	1st, 2nd, 5th	3	kar***re@gmail.com	70611
193	Parent	LC Interest List	2/24/26	M Freeman	1st	1	mfr***an@hcswarriors.org	70601
194			2/24/26				wil***51@yahoo.com	
195			2/24/26				sha***2u@gmail.com	
196			2/24/26				yos***83@icloud.com	
197			2/24/26				rub***91@gmail.com	
198			3/11/26	S Thompson			sar***14@gmail.com	
199	Parent + Talent	LC Interest List	3/11/26	S Hinton	1st, 2nd	2	shh***on@aol.com	70605
200	Parent + Talent	LC Interest List	3/11/26	J Carroll	Kinder, 2nd	2	jea***l3@gmail.com	70663
201	Parent	LC Interest List	3/11/26	T Alcantara	Kinder	1	tat***a1@gmail.com	70601
202	Parent + Talent	LC Interest List	3/11/26	A Franklin	Kinder	1	lon***ne@yahoo.com	70647
203	Parent + Talent	LC Interest List	3/11/26	J Torres	Kinder	1	jen***89@gmail.com	70607
204	Parent	LC Interest List	3/11/26	B Gschwend	2nd, 4th	2	dr***nd@gmail.com	70663
205	Parent	LC Interest List	3/11/26	T Frederick	Kinder	1	tra***th@yahoo.com	70611
206	Parent	LC Interest List	3/11/26	D Gschwend	1st, 3rd	2	des***ny@dgcurated.com	70663

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
207	Parent	3/4/2026 Event	3/4/26	J Fuselier			fus***ey@yahoo.com	
208	Parent	3/4/2026 Event	3/4/26	B			bbi***90@gmail.com	
209	Parent	3/4/2026 Event	3/4/26	H LEMONIA			hal***ia@yahoo.com	
210	Parent	3/4/2026 Event	3/4/26	A Arclese			are***na@areannainternational.com	
211	Parent	3/4/2026 Event	3/4/26	K Roberson			rob***i9@gmail.com	
212	Parent	3/4/2026 Event	3/4/26	K Arceneaux			kda***01@gmail.com	
213	Parent	3/4/2026 Event	3/4/26	L Kowarsch			kow***ol@gmail.com	
214	Parent	3/4/2026 Event	3/11/26	M Swier			mic***er@gmail.com	
215	Parent	3/4/2026 Event	3/11/26	A Huber			ale***23@gmail.com	
216	Parent	3/4/2026 Event	3/11/26	R Perry			rox***23@gmail.com	
217	Parent	3/4/2026 Event	3/11/26	J Jack			jai***28@gmail.com	
218	Parent	3/4/2026 Event	3/11/26	R Boggs			rac***07@gmail.com	
219	Parent	3/4/2026 Event	3/11/26	K Seguin			kat***n5@gmail.com	
220	Parent	3/4/2026 Event	3/11/26	T McGuire			tam***82@gmail.com	
221	Parent	3/4/2026 Event	3/4/26	J Bittner			jrm***90@gmail.com	
222	Parent	3/4/2026 Event	3/4/26	F Frank			mov***rd@gmail.com	
223	Parent	3/4/2026 Event	3/4/26	C Fine			fin***ia@gmail.com	
224	Parent	3/4/2026 Event	3/4/26	M Lehr			mea***12@yahoo.com	
225	Parent	3/4/2026 Event	3/4/26	H Olmsted			hea***ed@gmail.com	
226	Parent	3/4/2026 Event	3/4/26	S LHoste			spl***te@gmail.com	
227	Parent	3/4/2026 Event	3/4/26	A Braquet			ale***et@live.com	
228	Parent	3/5/2026 Event	3/5/26	D Jones			dja***05@yahoo.com	
229	Parent	3/5/2026 Event	3/11/26	M Richard			dav***76@outlook.com	
230			3/11/26	T LaCaze			tra***ze@gmail.com	
231			3/11/26				tri***64@yahoo.com	
232	Parent	3/5/2026 Event	3/5/26	A Nicole Humphery			amb***13@ymail.com	
233	Parent	3/5/2026 Event	3/11/26	M Carlin			mcc***in@outlook.com	

Great Hearts Lake Charles

No.	Community	Venue	Date	Parent/Guardian Name	Student(s) + Grade	# of Kids	Email	Zip Code
234	Parent	LA Interest List	10/6/25	A Pinnock	Kinder, 5th	2	Ama***ck@gmail.com	70816

Great Hearts Lake Charles

Event attended	First Name	Last Initial	Zip code	Grades of students
8/28/25	Qua'Laisha	B	70601	2nd
8/28/25	Joshua	B	70605	N/A
8/28/25	Henry	M	70601	N/A
8/28/25	Shanonda	L	70601	2nd
8/27/25	Jared	W		
8/27/25	Delicia	L	70615	6th
8/27/25	Danielle	F	70615	2nd
8/27/25	Tamara	P	70615	3rd
8/27/25	Michael	A	70601	K and 1
8/27/25	Kimberly	A	70615	
8/27/25	Leslie	F		
8/27/25	John	B	70605	5, 8, 11
8/27/25	Alexis	A	70607	1
8/27/25	McKinzy	B	70607	7, 6, 2, K and preK3
8/27/25	Earl	B		
8/27/25	Rita	C	70615	3
8/27/25	Ebone'	M	70601	1 and 4
8/27/25	Ryan	A	70615	1, kinder, 5, 8
8/27/25	Sommer	W	70665	2, 11
1/12/26	Leila	B	70611	3 and 5
1/12/26	Katheline	M	70607	
1/12/26	Orenthol	L	70611	K
1/12/26	Tonya	R	70601	ABA - 2nd grade
1/12/26	Thelma	D	70601	ABA
1/12/26	Krista	F	70611	
1/12/26	John and Nancy	F		
1/12/26	Katie and Tommy	M	70605	3 and K
1/12/26	Henry	M	70601	
1/12/26	Hannah	A	70605	2,3,K
1/12/26	Elizabeth	C	70605	
1/12/26	Stephen	R	70601	ABA - 2nd
1/12/26	Kathrena	S	70601	
1/12/26	Deidre	B	70663	PK
1/12/26	A'Brionna	S	70601	Headstart
1/12/26	Imani	L	70611	K
1/13/26	Pam	Q		
1/13/26	Courtney	B	70607	K and 2
3/5/26	D Jones	D		
3/5/26	Magen K Roberts	M		
3/5/26	Michaela	S		
3/4/26	Jen	T		
3/4/26	Jaimee	J		

RE: Great Hearts Lake Charles Letter of Support

To Whom it May Concern,

I trust you are well! Four of my six children have attended Great Hearts Harveston in Baton Rouge for the past three years, and I also currently serve as the Treasurer of the Great Hearts Louisiana Board. This letter is an expression of my hearty support for Great Hearts Louisiana opening a new school in the Lake Charles community.

Great Hearts is a national operator of public schools offering a classical education to children in the communities they serve. Great Hearts was founded more than 20 years ago with a mission to ***cultivate the minds and hearts of young men and women through the pursuit of Truth, Goodness, and Beauty***. Today, Great Hearts operates 45 brick-and-mortar public charter schools, 2 online public charter schools and, 2 private Christian schools across Arizona, Texas, Louisiana, **servicing 30,000 students in grades K–12**. Great Hearts academies are so successful in every community where they open that there are often waitlists to attend.

Nationally, Great Hearts academies are extremely successful:

- Average SAT score is **220 points above the national average**.
- **93% of graduates** immediately matriculate into higher education
- **72% of graduates** receive merit-based college scholarships
- **48% of graduates** choose to study a STEM major in college

Great Hearts currently operates one school in Louisiana: Great Hearts Harveston in Baton Rouge. The school opened in Fall 2023 and currently serves 670 students in grades K-9. Fall 2025 parent survey data indicates strong parent satisfaction at the school, including 92%+ of parents satisfied with their child's academic progress and with the curriculum. Additionally, 90% of current parents intend to re-enroll in the next school year.

Over the years, my husband and I have both homeschooled and have enrolled our children in Catholic and charter schools in Baton Rouge. As a Great Hearts parent now for the past three years, I can testify that the curriculum, quality of instruction, school culture, and robust academic intervention assistance at Great Hearts have far surpassed anything we were able to achieve at home or felt our children received at their other schools. Our family is very happy at the school—and we are there to stay.

As a Great Hearts Louisiana board member for the past two years, I have been privileged to serve in a capacity that gives me a deeper insight into Great Hearts America as an organization. From the Great Hearts founders themselves to every employee and administrator I have met, these are people of strong personal character who have many years of experience, strong research, business savvy, and highly-developed processes for ensuring the success of every school. Each and every one of them also has a contagious and real passion for making a high-quality classical education possible for students of any and every background and ability.

I can also testify to the well-developed processes, hard work, and good discernment at every level that goes into running a Great Hearts school. Like any new school, Great Hearts Harveston has had its share of unique challenges in these first three years of operation, but it's been a privilege as both a parent and board member to watch an outstanding administration tackle them with grace and wisdom—and with an

Great Hearts Lake Charles

incredible amount of boots-on-the-ground support from Great Hearts America. **Every Great Hearts school simply could not be in better hands.**

I have every confidence that the establishment of a new Great Hearts school in Lake Charles would offer the city an outstanding new school option that would attract a wide variety of families and students—and would serve them well.

Thank you for your time and for your support of this charter application. I warmly invite you to contact me if you have any questions.

Kind regards,

Erin Franco

Treasurer, Great Hearts Louisiana

Parent, Great Hearts Harveston



To whom it may concern:

I am writing to offer my strongest support for the approval of a new Great Hearts Academy campus in Lake Charles, Louisiana. As the Founder and CEO of the Classic Learning Test (CLT), I have had the privilege of working closely with schools and leaders across the nation who are committed to academic excellence and the renewal of classical education. Great Hearts stands among the very best of these institutions.

For more than two decades, Great Hearts has provided a rigorous liberal arts education that forms students intellectually and morally, preparing them not only for college but for lives of purpose, civic engagement, and cultural leadership. Their model consistently produces exceptional outcomes—measurable academic achievement combined with a deep respect for truth, goodness, and beauty.

Louisiana stands to benefit tremendously from the establishment of another Great Hearts campus. Families in Lake Charles deserve access to schools that are both academically excellent and rooted in a strong educational tradition. Great Hearts has demonstrated again and again that this combination is possible—and transformative for communities.

I strongly encourage the Board to support this opportunity and to welcome Great Hearts' expansion in Lake Charles. Their presence will enrich the educational landscape of the region and provide a model of excellence for the entire state.

Thank you for your time and consideration.

Sincerely,

A handwritten signature in black ink that reads "Jeremy Tate". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Jeremy Wayne Tate
Founder & CEO, Classic Learning Test

September 24, 2025

Letter of Support for Great Hearts

I understand that Great Hearts Louisiana is seeking to open a new school in the Lake Charles community. As an elected member of the East Baton Rouge School Board and as the parent of a 12-year-old, I am happy to express my strong support for Great Hearts. I am familiar with Great Hearts' record of success both through my service on the school board and through the direct observation of my daughter's experiences as a Great Hearts student for the past 2 years.

As you know, Great Hearts is a national operator of public schools offering a classical education to children in the communities they serve. Great Hearts was founded with a mission to cultivate the minds and hearts of young men and women through the pursuit of Truth, Goodness, and Beauty. Today, Great Hearts operates 45 brick-and-mortar public charter schools, 2 online public charter schools and, 2 private Christian schools across Arizona, Texas, Louisiana, and soon Florida, serving 30,000 students in grades K-12.

I'm certain Great Hearts has communicated to you already their national success statistics, the high average SAT scores, graduation rates, college scholarship rates, and so on. As a school board member, these statistics, and the local performance of their school in Baton Rouge, are why I support Great Hearts.

As a parent, I have a more qualitative evaluation. Before Great Hearts opened, my daughter attended another high-performing charter school in Baton Rouge, but she was not very happy. It, like Great Hearts, has exceptional statistics for academic performance. But my child wasn't happy, and she was not developing a joy of learning.

Since starting Great Hearts 2 years ago (as she entered 5th grade; she is in 7th now), I've seen remarkable change. Great Hearts' pursuit of Truth, Goodness, and Beauty is not an empty slogan, they live it. My daughter has developed a joy in learning and reading that she didn't have before. Great Hearts is responsible for that.

I remember a particular episode that for me illustrated the strength of the school. I was at an evening school event that included both parents and children. Many of the children, including my daughter and her friends, were out on the playground. When we had wrapped up the adult business, I went outside to watch their play. Relevant to this story is that they had recently been learning Jabberwocky, the Lewis Carroll poem, in class. The children were being children outside on a playground, loud and rambunctious. And I watched and listened in awe as they chased each other around, loudly reciting the Jabberwocky at each other, taking turns with the lines. There was no adult telling them to do so, looking over their shoulder. They were simply delighting in a thing they had learned at school that week.

This has carried over in many other areas. Not just literature, but also math and science and art. My child is not a straight-A student, but she is learning so much at Great Hearts... and is gaining a great spirit.

Both as a parent, as a past member of a charter school board (of a different charter school), and as an elected member of the Baton Rouge School Board, I've watched the creation of several new charter schools. I'm not sure I've seen any of them have as successful a first 2 years as Great Hearts has had. The data bears this out: enrollment is growing year over year, currently at 670 students in grades K-9. Some 92% of parents expressed satisfaction with their child's academic progress and the Great Hearts curriculum, and 90% intend to re-enroll next year. My wife and I are in that number.

I believe the establishment of a new Great Hearts school in Lake Charles will attract students' enrollment and enhance community relations because of the proven and trusted Great Hearts model.

I am confident that the proposed Great Hearts Lake Charles school is prepared to provide the same stellar leadership and innovative teaching and learning to the Lake Charles community as it has brought to Baton Rouge. I am happy and proud to support the school's charter application

Sincerely,



Patrick H. Martin, V
Board Member, District 9



September 29, 2025

To Whom it May Concern,

I write to express my strongest support for Great Hearts Louisiana opening a new school in the Lake Charles community. I am a founding member of the Great Hearts Louisiana board, the parent of a Great Hearts Harveston student, and a college professor with a deep interest in education, so I have a broad perspective of the positive contribution that a Great Hearts academy can make in your community.

I helped found the Great Hearts Louisiana board after researching the national footprint of Great Hearts and its academic success in every educational market it has entered. Founded with a mission to *cultivate the minds and hearts of young men and women through the pursuit of Truth, Goodness, and Beauty*, Great Hearts is a national operator of public schools offering a classical education to children in the communities they serve. Today, Great Hearts operates 45 brick-and-mortar public charter schools, 2 online public charter schools and, 2 private Christian schools across Arizona, Texas, Louisiana, and soon Florida, serving 30,000 students in grades K–12.

Nationally, the Great Hearts schools have had great success:

- Average SAT score is 220 points above the national average.
- 93% of graduates immediately matriculate into higher education
- 72% of graduates receive merit-based college scholarships
- 48% of graduates choose to study a STEM major in college

Great Hearts Louisiana currently operates one school – Great Hearts Harveston – in Baton Rouge. The school opened in Fall 2023 and currently serves 670 students grades K-9. 2025 Parent survey data indicates strong parent satisfaction at Great Hearts Harveston, including 92%+ of parents satisfied with their child’s academic progress and Great Hearts’ academic curriculum. Additionally, 90% of current parents intend to re-enroll in the next school year.

The keys to the success of Great Hearts, as I see it, are, first, that they hire faculty, staff, and administrators who themselves pursue truth, goodness, and beauty, which they then reflect on to their students. Second, their overall curriculum does an excellent job of making sure that the students master the fundamentals before advancing to more complex tasks – they like to say that “they go slow at first, so they can go fast later.” Third, their innovative and effective intervention program for students who are behind in mastering those skills has allowed those students to quickly enter into the curriculum. We have seen excellent gains in reading and math over the last year as the result of that intervention program.

I believe the establishment of a new Great Hearts school in Lake Charles will attract students' enrollment and enhance community relations because of the proven and trusted Great Hearts model.



Great Hearts Lake Charles is prepared to provide the stellar leadership and innovative teaching and learning the Lake Charles school system needs. We appreciate your support of the schools' charter application.

Sincerely,

A handwritten signature in black ink, appearing to read "David L. Whidden III".

David L. Whidden III, Ph.D.
Vice President of Mission and Professor of Theology
Franciscan Missionaries of Our Lady University

Recommendation for Great Hearts School

Moving to Baton Rouge from Lake Charles, my family and I were unfamiliar with the local school systems and unsure of what to expect. Discovering Great Hearts has truly been a blessing during this transition.

As we began researching the school, we were drawn to its classical education model and values. The more we learned, the more confident we felt that this was the right fit for our family. After touring the school and meeting with the leadership team, we were struck by their intentionality, passion for students, and commitment to excellence in education.

Most importantly, through prayer and reflection, we felt a strong sense of peace from God that this was where we were meant to send our children. That reassurance has only been confirmed by the positive experiences we've had since enrolling.

One of the things that stood out most to us was the school's intentional focus on classical literature and timeless texts that shape character and cultivate wisdom. We believe that exposing our children to these rich works, rather than relying heavily on modern digital tools, helps develop deeper thinking, imagination, and a love for learning. In a world that is increasingly dominated by screens, it was refreshing and important to us that Great Hearts limits the use of technology in the classroom and instead prioritizes meaningful, human-centered learning.

The classical model at Great Hearts aligns with our family's values and has challenged our children in ways that traditional models have not. The emphasis on character, virtue, and a well-rounded education has made a profound impact on their development both academically and personally.

For families in Lake Charles or surrounding areas who are considering a classical education, I would highly encourage you to give Great Hearts a chance. I truly believe it could be a life-giving investment for your children and your community—just as it has been for ours.

Blake & Lori Grundy

October 8, 2025

Re: **Great Hearts of Lake Charles Letter of Support**

To whom it may please,

For the past thirty-nine years I have consistently served the Lake Charles area community as a pastor, as an educator, and as a community volunteer in constructing quality, affordable housing. In the education sphere I have had thirty-four years of experience in the Catholic School System and eleven years working with and for the three charter schools operated by the Lake Charles Charter Academy Foundation.

Today I offer my support for Great Hearts Louisiana opening a new school in our community. I believe that if one supports “educational choice”, that ***choice*** must be supported when a unique, quality choice is offered. With its *classical model* of education and its demanding, rigorous curriculum, I believe that GREAT HEARTS offers such a different and unique choice.

Great Hearts is a national operator of public schools. Great Hearts’ mission is to **cultivate the minds and hearts of young men and women through the pursuit of truth, beauty, and goodness**. Great Hearts operates forty-five brick and mortar public charter schools, two online public charter schools, and two private Christian schools across Arizona, Texas, Louisiana, and soon Florida, serving 30,000 students in grades K-12.

But they not only operate schools. Great Hearts operates successful schools:

- Average SAT score is **220 points above the national average**.
- **93% of graduates** immediately pursue higher education.
- **72% of graduates** receive merit-based college scholarships.
- **48% of graduates** choose to study a STEM major in college.

Great Hearts Louisiana operates Great Hearts Harveston in Baton Rouge. The school opened in the Fall of 2023 and now serves 670 students in grades K-9. The 2025 Parent Survey data indicates strong parent satisfaction with Great Hearts Harveston. 92%+ of parents are satisfied with their child’s academic progress and 90% of parents indicated their plan to re-enroll for the next school year.

I believe there is a segment of our community who want more than is currently being offered by our school systems. I believe that there are families who are considering coming to our community who want more than they see in our schools now. Great Hearts will provide the stellar leadership and innovative teaching that we need in the Lake Charles community. Thus, I have no hesitation in offering my support to the Great Hearts charter school application.

Sincerely,

Rev. Dr. Henry J. Mancuso, *Retired*



The Governor's Program for Gifted Children

MSU Box 91490
Lake Charles, Louisiana 70609
337.475.5446
office@gpgc.org

www.gpgc.org

Dear Louisiana State Board of Elementary and Secondary Education,

I am writing to express my professional and personal support for the Great Hearts Lake Charles charter school application.

I am the director of the Governor's Program for Gifted Children (GPGC), a statewide residential summer program for gifted middle and high school students that has taken place at McNeese State University in Lake Charles since its inception in 1959. I have been the director of this program since 2008 and have a great interest in improving the educational opportunities available to all of Louisiana's children.

I know that Great Hearts' application materials are full of impressive statistics indicating their model's success throughout the country, as well as specifically in Baton Rouge at their Great Hearts Harveston campus. I would like to share my personal perceptions based on what I have learned about Great Hearts over the past year or so through online research, observations at Great Hearts Harveston in Baton Rouge, and several meetings with the team that is proposing the Lake Charles school.

Here are the most impressive parts of the Great Hearts approach to me:

- The two instructors in every K-5 classroom, a primary and an assistant. I saw this in action in Baton Rouge and I was greatly impressed at how the primary teacher was leading the class while the assistant was helping the students individually stay focused, on task and with any concepts they were struggling with at the moment. I also observed the Headmaster of the school casually help a student as well – indicating that this encouraging culture is modeled from the top down.
- The focus on reading and writing (and really all classroom learning) without screens and technology. While I am sure there is adequate training in later years, the fact that these young students don't have a laptop open in front of them just to read the assigned work or type out their classwork is an approach that I believe can only benefit them in their future educational endeavors and communicates to them that the subjects and values they are learning in class are "real" and not just another facet of their increasingly online lives.
- The interweaving of a civic education and culture with the school curriculum is outstanding. From the very beginning of their educational journey, the students are exposed to a culture that is based on the values that make all of us good humans, and this is reinforced with examples of those values being communicated through classical literature, philosophy and scientific reasoning.

- The attention paid to all of the students, no matter their educational background. At the Baton Rouge school I saw a great diversity of students from all backgrounds and it was clear that some of them needed some extra help to adjust to the Great Hearts model – especially with the focus of rigorous reading. These students were provided with extra individualized tutoring during the class day to give them every opportunity to succeed and not feel discouraged if they weren't exactly on level with their peers.

I could list maybe another ten points like this (I haven't even mentioned my absolute favorite aspect of Great Hearts – the teaching of Latin starting in Kindergarten!) but I wanted to emphasize the things that I think make Great Hearts such a wonderful educational opportunity for all students in Louisiana. I can say that I would have sent my three daughters to this school without any question if it was available when they were in elementary school.

In short, the Great Hearts Lake Charles school will offer the families of Lake Charles the opportunity to send their children to an outstanding school as part of a public education. I am not naturally a proponent of charter schools in general but if all charter schools offered the type of focused, individualized attention combined with an excellent, rigorous curriculum that Great Hearts does, I would support them 100%.

Sincerely,

A handwritten signature in black ink, appearing to read 'J. Brown', with a long horizontal flourish extending to the right.

Joshua D. Brown
Director

Appendix 2: Draft School Model Master Plan

Great Hearts Lake Charles Master Plan for Discipline

Positive Behavior Support

In order to assure classroom management using positive behavioral supports and effective disciplinary tools, Great Hearts Lake Charles will identify data-driven academic, career and technical, discipline/behavioral performance results in the School Improvement Plan (SIP). Great Hearts Lake Charles will establish and use a school-based leadership team to meet on a regularly scheduled basis to review data and guide the positive behavior process. This leadership team shall, to the extent possible, include representatives of the school administration, both regular and special education teachers, parents, guidance counselors, and school bus operators (It may also include other groups, e.g., food services workers).

The leadership team will use a decision-making process utilizing a data-management system that allows graphical representation of discipline issues. Said data system will permit regular and efficient monitoring and evaluation of the effectiveness of the implementation of a school-wide system of discipline. School data collection shall include, but not be limited to, average referrals per day per month, referrals by problem behavior, referrals by location, referrals by time, referrals by student, referrals by staff, individual student report by month and by year, and referrals by grade level. Environmental changes may be made as indicated by data. For instance, increased monitoring, schedule changes, or changes in recess structure may help to alleviate congestion or over-crowding at certain times during the day.

The team will uniformly use the two BESE-approved forms, i.e., "School Behavior Report Form" and "School Bus Behavior Report Form," to report incidents of alleged discipline violations. The referral system will be utilized consistently and appropriately.

The leadership team will review and revise any Zero Tolerance Policy of Great Hearts Lake Charles to ensure that the policy is in compliance with R. S. 17:416.15; the policy does not violate R. S. 17:416 (H) which prohibits disciplinary action against any pupil reasonably acting in self-defense; and that inappropriate referrals are not made to agencies serving children.

The leadership team will review and revise its policies and procedures for handling suspensions and expulsions at Great Hearts Lake Charles to ensure that suspension/expulsion policies are consistent with R. S. 17.416; suspension/expulsion policies are consistently and fairly executed; and alternative interventions, consistent with best theory and practice, to suspensions/expulsions are used including, but not be limited to, counseling, conflict resolution, social and family responsibility, peer mediation, and stress and/or anger management.

The leadership team will make referrals, as appropriate, to Alternative Education Programs that are designed to offer variations of traditional instructional programs, as well as strategies for the purpose of increasing the likelihood that students who are unmotivated or unsuccessful in traditional programs, or are disruptive in the traditional school environment, remain in and be successful in school.

The leadership team will review the current Code of Student Conduct of Great Hearts Lake Charles to assure that it is in compliance with R.S.17:416.12, R.S. 17:416.13 and Section 4114 of the No Child Left Behind Act of 2001 (NCLB). They will refine consequences to create a reward/incentives program for positive student and teacher behavior and ensure the delivery of consistent reinforcement. The team will define consequences for rule violations that are clear, reasonable, and consistently enforced and which support maximum time in instruction.

The leadership team will monitor, evaluate and modify the school master plan, as needed, throughout the school year.

Great Hearts Lake Charles Master Plan for Discipline

Great Hearts Lake Charles adopts the following clearly defined behavioral expectations in these five (can be less) basic rules. (Keep them simple and positive, e.g., "Keep your hands to yourself." "Respect others." "Be kind.")

1. Listen first, speak second
2. Treat others as you want to be treated
3. Gratitude is the greatest virtue
4. Seek truth with humility
5. Our character is our destiny

These rules shall be posted in prominent places around the school site, e.g., hallways, cafeterias, gymnasiums, and classrooms. These rules shall be provided to parents and shall be known by all students and school staff.

Each teacher at Great Hearts Lake Charles shall develop lesson plans and teach expectations across each school setting by providing direct instruction on expected behaviors at the beginning of the school year and reinforced throughout the year for all students.

Great Hearts Lake Charles shall design programs for students with special needs so that the students are challenged and engaged in school curriculum, and are appropriately placed so they remain in school rather than being suspended/expelled or becoming drop-outs.

The principal of Great Hearts Lake Charles shall submit annual reports to the district's Discipline Policy Review Committee.

Safe School Planning

Great Hearts Lake Charles has established and shall maintain grade-appropriate programs of alcohol, drug and substance prevention, education, information and counseling as provided in R.S. 17:404.

Great Hearts Lake Charles has established a plan, in accordance with Sec. 4114, of the No Child Left Behind Act of 2001, for keeping the school safe and drug-free that includes appropriate and effective school discipline policies that prohibit disorderly conduct, the illegal possession of weapons, and the illegal use, possession, distribution, and sale of tobacco, alcohol, and/or other drugs; has established security procedures at school and while students are on the way to and from school; has established prevention activities that are designed to create and maintain safe, disciplined, and drug-free environments; has established a crisis management plan for responding to violent or traumatic incidents on school grounds; and has established a Code of Student Conduct (and as also required by R.S. 17:416.12 and R.S. 17:416.13) for all students that clearly states the responsibilities of students, teachers, and administrators in maintaining a classroom environment that allows a teacher to communicate effectively with all students in the class; allows all students in the class to learn; allows all students and school employees to be treated respectfully; has consequences that are fair and developmentally appropriate; considers the student and the circumstances of the situation; and, is enforced accordingly.

Parental and Community Involvement

Great Hearts Lake Charles is committed to parental involvement and family strengthening. As set forth in R. S. 17:406.1, effective approaches to involving families more fully as partners in the

Great Hearts Lake Charles Master Plan for Discipline

process of their children's learning require the participation and coordination of numerous state and local, public and private agencies shall be encouraged. Great Hearts Lake Charles shall seek to make connections through a variety of local and culturally sensitive methods to facilitate parents/family members/access to local/regional family strengthening programs available in the community. (Programs can be specifically identified, as applicable, e.g., Families Helping Families, Regional Family Resource centers, Parent Information Resource Center, Families In Need of Services [FINS] programs and other family strengthening programs exhibiting peer to peer support systems and positive mental health initiatives).

Great Hearts Lake Charles shall seek training to facilitate mutual understanding of research-based practices promoting positive relationships between parents, LEA personnel and community service providers.

Great Hearts Lake Charles shall seek to identify the mental health needs of its students and match those needs with available local resources including public, nonpublic and/or volunteer organizations (These can be specified to the extent possible). Pending inclusion of mental health services in the Medicaid Health Services Program (School-Based), the availability of mental health services will be expanded in

Inter-Agency Cooperation

Great Hearts Lake Charles shall seek to improve communication, coordination and collaboration between schools and agencies serving children; shall foster cooperation regarding the sharing of data about children, youth and families involved agencies serving children; and shall work in cooperation with other schools/districts/communities/regional planning boards to facilitate the successful re-entry and transition of youth formerly in state custody into their diverse school/community settings in order to encourage the continuation of education and their access to other needed services in order to prevent recidivism.

Student Records

Great Hearts Lake Charles School shall provide for the transfer of student education records upon written request of any authorized person on behalf of an education facility operated within any correctional or health facility or, for children in the custody of the state, an education facility operated within any other state approved facility, whether within or outside the state of Louisiana, where such student has become enrolled or is seeking enrollment. The transfer of such records, whether by mail or otherwise, shall occur not later than 10 business days from the date of receipt of the written request. If the student has been expelled, the transferred records shall include the dates of the expulsion and the reason(s) for which the student was expelled.

No education record of any student may be withheld as the result of lack of payment of any fine, debt, or other outstanding obligation.

A student or his or her parent(s) may inspect the education record of that in accordance with the federal Family Education Rights and Privacy Act.

Any student seeking admission to Great Hearts Lake Charles School who has been suspended or expelled from any public or nonpublic school within or outside the state of Louisiana shall provide information on the dates of any suspensions or expulsions and the reason or reasons for which the student was suspended or expelled.

Visiting Teacher/ Child Welfare and Attendance Supervisor/Families in Need of Services (FINS) Officer

Great Hearts Lake Charles Master Plan for Discipline

It is the duty of all staff at Great Hearts Lake Charles to cooperate fully with the visiting teachers, or supervisors of child welfare and attendance. Great Hearts Lake Charles shall make available to visiting teachers, or supervisors of child welfare and attendance, FINS officers, and Truancy Assessment and Service Centers such information as will assist them in promoting the regular attendance and school adjustment of these children.

[For schools/programs housing children in state custody: It is the duty of the principals, superintendents, or heads of the training and correctional schools to notify the visiting teachers, or supervisors of child welfare and attendance, and FINS officer (if applicable) when a child is to be released and/or returned to a parish.]


Visiting teachers, or supervisors of child welfare and attendance (pursuant to R. S. 17:235), and FINS officers, shall cooperate fully with the state departments of social services, labor, and health and hospitals, and with other state and local agencies, including interchange of confidential and privileged information; cooperate fully with juvenile and family court authorities, training and correctional schools, law enforcement officers; and make such referrals and conduct such investigations as seem necessary for the enforcement of school attendance laws, including interchange of confidential and privileged information.

Statements of compliance

Each homeroom teacher of students in grades 4-12 shall, on the first day of school each school year, provide information to and answer any questions from students relative to the statement of compliance as provided by the Great Hearts Lake Charles Board.

Each parent/guardian of each student in grades 4-12 shall sign a statement of compliance committing to do all of the following: ensure that his child attends school daily, except for school absences; ensure that his child arrives at school on time each day; ensure that his child completes all required homework assignments; and attend all required parent and teacher or parent and principal conferences.

Signatures:

 _____ Superintendent	_____ Leadership Team Member
_____ Leadership Team Member	_____ Leadership Team Member
_____ Leadership Team Member	_____ Leadership Team Member
_____ Leadership Team Member	_____ Leadership Team Member

Appendix 3: Grievance Policy

COMPLAINT/GRIEVANCE POLICY AND PROCEDURES

It is the Academy’s policy to ensure that students or parents/guardians with a grievance relating to the Academy, its administration, and/or other employees shall, except as otherwise set forth below, use a procedure which may resolve grievances as quickly and as fairly as possible.

The grievance procedure is clearly outlined below.

Process	Guidance
<p>Stage 1 If parents/guardians or student has a grievance it should be discussed informally with the teacher, Dean, Head of School, or staff member directly involved in the matter. The Academy hopes majority of concerns will be resolved at this stage.</p>	<p><i>Informal discussions should resolve the vast majority of grievances.</i> <i>NOTE: Grievance or information involving an ongoing or imminent threat to a student’s well-being should skip this stage and be immediately directed to the Head of School.</i></p>
<p>Stage 2 If the matter is not satisfactorily resolved, the matter may be raised, in writing, with the Dean, who must give a response within 5 school days. This response may take the form of a letter and/or follow-up meeting with the family and any employee(s) involved in the matter. This meeting will be led by the Dean.</p>	<p>The Dean oversees the discipline of the Academy.</p>
<p>Stage 3 If the matter is still not satisfactorily resolved, the matter may be raised to the Head of School by addressing the matter in writing to the Head of School, who must give a response within 10 school days. This response may take the form of a letter and/or follow-up meeting. This meeting will be led by the Head of School.</p>	<p>The Head of School is the acting supervisor over all school employees.</p>
<p>Stage 4 If the matter is not resolved satisfactorily, and the parent/guardian wishes to pursue the matter further, the grievance should be put in writing to the Chairman of the Board of Directors. The Chairman will formally respond by setting a meeting or taking another course of action within 30 school days. If the Board as a whole is convened to address the grievance, all applicable public open meeting laws will be followed, including prior notice and the right of the employee(s) directly involved in the matter to request an open meeting or an executive session for the hearing. The Board’s decision is final.</p>	<p><i>Stages 1, 2, and 3 must be completed before the action is brought to the Board of Directors. A response by the Board may include a dismissal of the grievance, a formal reprimand of the school employee(s), or Head of School, and/or a directive for staff to develop an additional policy recommendation for Board consideration.</i></p>

Appendix 4: School Leadership Team Resumes

Name	Proposed Role	Expertise and Rationale
Jason A.D. Doughty	Great Hearts Louisiana Executive Director	<ul style="list-style-type: none"> ● Over a decade of experience in K-12 education ● Former Great Hearts Teacher and Headmaster ● Master's of Divinity ● Currently enrolled in M.A. in Humanities in Classical Education program
TBD (Job Description provided)	Greta Hearts Lake Charles Head of School	
Holly R. Manuel	Great Hearts Louisiana Director of Finance	<ul style="list-style-type: none"> ● Over a decade of experience in finance
Helen E. Baxendale	Chief of Staff, Vice President of Strategy and Analytics	<ul style="list-style-type: none"> ● Over a decade of experience on K-12 and higher education ● Ph.D. in Public Policy ● Provides support to Great Hearts Lake Charles School Leadership Team
Dr. Daniel P. Scoggin	Chief Academies Officer	<ul style="list-style-type: none"> ● Co-Founder of Great Hearts Academies ● Ph.D. in English Literature ● M.A. in Character Education ● Provides support to Great Hearts Lake Charles School Leadership Team
Jerilyn K. Olson	Chief People Officer	<ul style="list-style-type: none"> ● Over 15 years of leadership in academics and talent development at Great Hearts Academies ● Master of Humanities in Classical Education ● Provides support to

Great Hearts Lake Charles

		Great Hearts Lake Charles School Leadership Team
J. Jacob Tawney	Chief Academic Officer, Great Hearts Academies, Phoenix	<ul style="list-style-type: none"> ● Nearly two decades of experience in K-12 and higher education ● Over a decade of experience as a leader of academics at Great Hearts Academies ● M.S. in Mathematics ● Provides support to Great Hearts Lake Charles School Leadership Team
Bianca Nicole Ulibarri	Great Hearts America Director of Governance	<ul style="list-style-type: none"> ● Fifteen years of experience in public school governance ● Provides support to Great Hearts Lake Charles School Leadership Team

EDUCATIONAL LEADERSHIP STRENGTHS

Extensive experience in leading teachers and volunteers in implementing multiple levels of programming and curriculum, and communicating vision with passion, moral conviction, and eloquence to broad and varied audiences. Specific experience in developing and integrating organization-wide educational efforts, communication strategies, calendars and campaigns, and personally effecting a warm, welcoming and exciting community.

Personal skills include strategic planning, developing new approaches and solutions for organizational challenges, and bringing efficient structure to processes and systems. Expertise in leading teams, creating collaborative buy-in amongst stakeholders, and celebrating success. Naturally motivated to meet challenges, see untapped potential, and bring about effective change that makes a difference in the lives of students, teachers, and volunteers.

PROFESSIONAL EXPERIENCE

2025 to Present **GREAT HEARTS LOUISIANA**, Baton Rouge, LA
Executive Director of Great Hearts Harveston
Leading the Heads of school to accomplish the academic, cultural, and formative goals set out by the board and the state. Coordinating national network leads and resources to provide effective coaching and support to achieve the student learning objective goals.

2025 to Present **GREAT HEARTS AMERICA**, Phoenix, AZ
Executive Director: Great Hearts Services
Serving three networks of schools across three states, providing access to Great Hearts extensive school support network, while also providing executive level coaching and leadership.

2024 to 2025 **GREAT HEARTS TEXAS**, San Antonio & Dalas, TX
Interim Executive Director
Assisted the Superintendent in supporting 20 headmasters in both San Antonio and Dallas. Lead a budget process to prevent a reduction in force while also meeting necessary budget targets through extensive research and collaboration with stakeholders.

2023 to 2024 **GREAT HEARTS FLORIDA**, Jacksonville, FL
Director of Growth
Engaged in community development, real estate acquisition, philanthropic engagement with the purpose of opening the state of Florida to brick and mortar Great Hearts K-12 charter schools.

- 2018 to 2022 **GREAT HEARTS FOREST HEIGHTS, San Antonio, TX**
Founding Headmaster
Serving as the inaugural headmaster, hiring all faculty and staff, preparing all necessary operational and logistical plans, developing onboarding and training plans for each individual member. Created a coaching program that saw to the development of 100+ teachers, and a dynamic reporting structure that supported and empowered the school's department heads, including Special Education Coordinator, Director of Campus Operations, ESL Coordinator, 504 Coordinator, After School Care Director, PSO, and our Athletic Director.
- 2015 to 2018 **GREAT HEARTS NORTHERN OAKS, San Antonio, TX**
Assistant Headmaster of Operations
Planned, coordinated and implemented various operation and logistical solutions critical to the smooth running of the school. Assisted in teacher formation, observing faculty and coaching. Frequently engaged with parents regarding all aspects of school life, including Special Education, discipline and evaluations.
- 2014 to 2015 **GREAT HEARTS MONTE VISTA, San Antonio, TX**
Third Grade Team Leader, Dean of Third – Fifth Grade
Organized, planned and taught a full liberal arts curriculum to Third Grade Students. Lead a team to ensure cohesion and continuity across the classes of the third grade. Assisted Assistant Headmaster with various projects.
- 2013 to 2014 **ARCHWAY NORTH PHOENIX, Phoenix, AZ**
Third Grade Lead Teacher
Organized, planned and taught a full liberal arts curriculum to Third Grade Students. Created a vibrant classroom through engaging and energetic Socratic questions. Established a community with the parents enabling strong and clear communications.
- 2007 to 2013 **CAMELBACK BIBLE CHURCH, Phoenix, AZ**
Pastor of Children's Discipleship
Coordinated christian educational strategies for birth through 6th grade, administering six distinct programs with a yearly volunteer staff of over 150 directors, teachers and small group facilitators, engaging over 350 students on a yearly basis. Led parents and volunteer staff to challenge students to integrate the truth of their education into their daily lives, with appropriate developmental goals, resulting in distinct behavioral change for many students. Initiated collaborative Educational coordination between Youth, Adult and Children's Ministries to achieve our mutual strategic educational goals. Initiated and implemented quarterly family events and an annual church wide Family Camp to build greater community, this resulted in more unity and better communication.

EDUCATION

Master of Arts in Humanities in Classical Education (In Progress),
University of Dallas, (2019-Present)

Graduate of Headmaster's College Program, Great Hearts America, 2017

Master's of Divinity, Southeastern Baptist Theological Seminary
NC, 2006
Advanced Biblical Studies and Biblical Languages

Bachelor of Arts Degree, Multnomah University,
OR, 2002
Area of Concentration: Dual Major: Speech Communications, Bible &
Theology, Minor in NT Greek

Job Description – Lake Charles Head of School

The Lake Charles Head of School will be the school leader. This will be a salaried, exempt position with a 12-month work schedule. Salary will be set annually on a performance-based schedule. The head of school will report to the Executive Director, who reports to the Board of Directors.

The head of school's overarching role will be to maintain the integrity of the school's culture and effective learning environment. To accomplish this, the head of school will administer and supervise every aspect of the school's daily instructional and academic functions. The head of school will set the example for all students, teachers, and staff to maintain a constant atmosphere of civility, trustworthiness, respect, and concern for one another.

The head of school's essential duties and responsibilities are as follows:

Leadership

- Implementing and evaluating the school's mission and goals, reporting regularly to the board of directors.
- Maintaining a school atmosphere of academic excellence, civility, trustworthiness, respect, fairness, and equality.

Instructional

- Planning, implementing, and evaluating the school instructional program based on student needs and Louisiana Standards.
- Setting instructional priorities and goals.
- Ensuring alignment of curriculum with Louisiana Standards.
- Reviewing teacher lesson plans and instruction to ensure compliance with Louisiana Standards, the school's mission, and the charter contract.
- Assuring that all academic components of the school's charter are being met.

Administrative

- Recruiting instructional faculty for the school as needed.
- Planning, implementing, supervising, and evaluating all other programs, i.e. athletics, extra-curricular, co-curricular.
- Determining staffing needs including selection, supervision, staff development and evaluation of school instructional personnel.
- Managing state assessment procedures and compliance.
- Reporting instructional employee appointment or dismissal to the board of directors.

- Ensuring the school is operating within the set instructional budget.
- Overseeing the proper academic record keeping processes.
- Maintaining records such as but not limited to student test scores, attendance records, overseeing IEPs, and all other reports as needed for efficient operation of the school and compliance with federal, state and local requirements.
- Enforcing the policies and procedures of the organization as set by the board of directors, including the student code of conduct.
- Developing and implementing school rules and regulations in keeping with the policies and procedures.
- Attending and participating in meetings of the board and its committees as requested.
- Maintaining knowledge of Charter School Laws and Louisiana Statutes.

Computer Skills

- To perform this job successfully an individual must have knowledge of accounting software, order processing software, spreadsheet software and word processing software.

Minimum Qualifications

- Candidates should have a solid understanding of classical education and a dedication to the liberal arts and the teaching of civics.
- Preferred candidates will have a master's degree, teaching experience at the K-12 or college level, a record of leadership, and demonstrated abilities in speaking and writing.
- Five (5) years of related professional experience required. Bachelor's degree required, but master's degree (or currently enrolled in) is preferred.

Qualities the School Leader Must Have for This School to be Successful

The successful candidate for school leader will have a solid understanding of classical education and a dedication to the liberal arts and the teaching of civics. Preferred candidates will have a master's degree, teaching experience at the K-12 or college level, a record of leadership, and demonstrated abilities in speaking and writing.

Key Skills and Competencies

Five (5) years of related professional experience required. Bachelor's degree required, but master's degree (or current enrollment in) is preferred.

The head of school must be competent in hiring and managing teachers of the highest caliber, effectively implementing a classical liberal arts and civic-minded curriculum, establishing a studious and decorous school culture, and maintaining healthy enrollment. In addition, the head of school will work to foster an understanding of liberal arts education and the virtues of school choice among parents and the community at large.

Great Hearts Academies is an Equal Opportunity Employer. The organization is committed to providing equal opportunity for all individuals in all areas of recruitment, selection, placement, training, assignment, transfer, compensation, benefits, discipline, retention, and promotion. The board commits itself to the policy that there shall be no unlawful discrimination against any person because of race, color, religion, age, sex, national origin or disability. All decisions with regard to employment shall be in compliance with applicable state and federal laws.

Holly R. Manuel

Professional Experience Summary: A meticulous finance expert with over a decade of experience in budgeting, forecasting, and financial analysis. Proficient in effective communication across various organizational levels to achieve both immediate and long-term financial goals.

Senior Finance Manager – Great Hearts Louisiana, Inc.

September 2023 – Present

- Responsible for the overall financial health of the Louisiana Charter Academies including financial planning and analysis; financial compliance and reporting; budget and grants management; and, strategic growth planning.

Director of Finance – Skylight Lending, LLC

April 2023 – September 2023

- Responsible for developing, enhancing, and maintaining the company's financial models, forecasts, and estimates including regular updates and formalization to ensure accuracy and reliability.
- Actively support the company's long-term growth and profitability goals through my financial expertise and analysis.

Manager, Financial Planning & Analysis – Republic Finance, LLC

October 2021 – November 2022

Senior Financial Analyst

October 2020 – October 2021

Financial Analyst

July 2017 – October 2020

- Supported Executive and Senior Leadership by providing timely and accurate information driving decision making.
- Prepared and presented monthly financial packages and variance analysis to the Senior Executive Team and the Board of Directors.
- Utilized Hyperion Essbase and PowerBI to analyze and translate operational metrics into financial variances.
- Managed the financial component of the Company's contract approval process, including annual vendor financial due diligence.
- Oversaw Corporate Department budgeting, forecasting, reporting, and analysis for 25+ individual departments, including capital outlays and salary and benefits projections.
- Managed monthly borrowing base forecasting and reporting, analyzing leverage and interest coverage impacts, and coordinated the annual collateral audit with lenders and corporate leaders.
- Provided timely and accurate information to support Executive and Senior Leadership in decision-making processes.

Mortgage Loan Processor – Guaranty Bank & Trust Company – New Roads, LA

October 2015 – June 2017

Budget Analyst 3 – Louisiana Department of Education – Baton Rouge, LA

October 2014 – October 2015

- Monitored and forecasted revenues and expenditures for various means of finance via SAP Business Objects.
- Developed and maintained management reports and conducted statistical analysis using Excel and Pivot Tables.
- Prepared expenditure reports including position simulations and monthly expenditures/encumbrance reports.
- Facilitated financial reviews with Directors on all current, ongoing, and anticipated budgets.
- Prepared Joint Legislative Budget Committee (JLCB) PowerPoint Presentation materials based on annual data.
- Reviewed and approved purchase requisitions via SAP.
- Functioned as the Finance Division's Internal Point of Contact for all budget and financial related inquiries.

Financial / Information Analyst – Arvest Bank Group, Inc. – Little Rock, AR

August 2011 – June 2014

Bank Teller & Customer Service Representative - Fayetteville, AR

May 2006 – August 2011

- Oversaw an annual budget of \$175 million within the mortgage servicing division of the company.
- Performed comprehensive financial analysis on the financial statements of all business partners, conducting reviews on a quarterly or semi-annual basis.
- Conducted quarterly financial reviews with 17 department heads to assess performance and budget compliance.
- Contributed to company reporting for business ratings, including assessments by Fitch Ratings and Moody's Investor Services.
- Efficiently coordinated and prepared documentation for both internal and external audit requests and reviews.
- Produced year-end reports, certifications, and presentations tailored for government agencies and private investors and various reports for management, including bi-monthly reports for the Board of Directors.

Education

University of Arkansas, Sam M. Walton College of Business - Fayetteville, AR

Bachelor of Science in Business Administration May 2011

Major: Finance / Minor: Information Systems

EMPLOYMENT

GREAT HEARTS ACADEMIES

Chief of Staff, VP Strategy and Analytics, January 2023-Present

Director Strategy and Analytics, October 2021-January 2023

- Great Hearts Academies is a network of 50 K-12 classical liberal arts academies serving 30,000 students across Arizona, Texas, and Louisiana
- Oversee planning and implementation of the executive priorities of Great Hearts America through effective process design, collaboration, and timely analysis
- Collect and analyze data to inform strategic decision-making on new school markets, enhanced academic performance, student retention and parent and employee satisfaction and retention, among other key aspects of Great Hearts' operations
- Special projects as assigned by the CEO

ARIZONA BOARD OF REGENTS

Director, Academic Affairs and Policy, July 2019-October 2021

- Advised governing board of Arizona's three public universities on academic policy
- Provided analysis on institutional performance
- Led the Board's initiatives to boost Arizona-resident degree attainment

UNIVERSITY OF OXFORD

Lecturer/Tutor at Blavatnik School of Government and Department of Social Policy, March 2016-June 2019 (*part-time alongside graduate studies*)

- Taught weekly tutorials for the following subjects: Social Policy (option paper for undergraduate Politics, Philosophy and Economics degree); Comparative Education Policy (Stanford University undergraduate exchange students); Politics of Policymaking (core unit for Masters of Public Policy degree)

MAGDALEN COLLEGE, UNIVERSITY OF OXFORD

Sub-Dean, August 2016-August 2018 (*part time alongside graduate studies*)

- Supported student welfare and oversaw discipline at one of Oxford's larger residential colleges

PARLIAMENT OF AUSTRALIA, OFFICE OF THE HON. CHRISTOPHER PYNE MP

Advisor to the Australian Minister for Education, December 2013-September 2014 (*resigned to take up Rhodes scholarship*)

- Advised minister on teacher training, school improvement and curriculum reform
- Coordinated major independent expert review of initial teacher education in Australia

TEACH FOR AUSTRALIA, CANBERRA COLLEGE

Classroom Teacher, December 2011- December 2013

- Taught Year 11 and 12 Modern History, English and Civics; Coached cricket, debating and mock trials teams

PARLIAMENT OF AUSTRALIA, OFFICE OF THE HON. TONY ABBOTT MP

Assistant Advisor (Social Policy) to the Federal Leader of the Opposition, December 2009-November 2011

Researcher to the Shadow Minister for Families, February 2007-December 09 (*part-time alongside undergraduate studies*)

- Assisted with social and education policy development. Conducted research to support political and media strategy
- Member of Leader of the Opposition's personal detail during 2010 election campaign

Great Hearts Lake Charles

EDUCATION

UNIVERSITY OF OXFORD, Blavatnik School of Government & University College
D.Phil. (PhD), Public Policy, October 2016-May 2020
Supported by Rhodes and Clarendon Scholarships

UNIVERSITY OF OXFORD, Department of Social Policy & Hertford College
M. Phil. Public Policy, October 2014-June 2016
Graduated with Distinction (highest honours) and dissertation prize; supported by Rhodes Scholarship

UNIVERSITY OF MELBOURNE, Graduate School of Education
Master of Teaching (Secondary), December 2011-December 2013
High Distinction

AUSTRALIAN NATIONAL UNIVERSITY

B.Phil. Political Science (Honours), and History, January 2007-December 2011
First Class Honours (summa cum laude) and ANU Medal for Political Science

PUBLICATIONS AND COMMISSIONED REPORTS

‘Wendy Kopp’ 2022. In Bret A. Geier (ed.) *The Palgrave Handbook of Educational Thinkers*, Palgrave Macmillan. With Matthew A. Thomas. [Link](#)

‘Our Way or Huawei: Fissures in the Five Eyes Alliance in the Face of a Rising China’
University of Ottawa Centre for International Policy Studies Blog, 16 October 2020 [Link](#)

‘Backlash and Beyond: What Lies Ahead for Teach for America?’, *Education Week*, 29 May 2020. [Link](#)

‘Building a ‘Movement for Systemic Change’: How Teach For America Took Off in the 2000s,’ *Education Week*, 27 May 2020. [Link](#)

‘The Puzzle of Teach for America,’ *Education Week*, 26 May 2020. [Link](#)

‘Underwriting Brexit: the European Union in the Anglosphere Imagination.’ 2019. In Ben Wellings and Andrew Mycock (eds.) *The Anglosphere: Continuity, Dissonance, and Location*. Proceedings of the British Academy. Oxford: Oxford University Press. With Ben Wellings. [Reviewed](#) in *Perspectives in Politics* September 2020

‘Fact, Fiction, and the Future of Work and Education: A review of the literature and an evaluation of Australian government policy.’ 2018. Australian Department of Education, Canberra. With Dan Hanrahan.

‘Teacher Workforce Policy in Singapore: Lessons for an American Context.’ 2017. Robertson Foundation, New York City.

‘Making STEM a Primary Priority: Practical steps to improve the quality of science and mathematics teaching in Australian Primary Schools.’ 2016. Sydney: PwC Australia. With Philip Le Feuvre and Sara Caplan. [Link](#)

‘In search of a post-Brexit role: the power of the Anglosphere in Eurosceptical thought,’ *London School of Economics British Politics and Policy Blog*, January 2 2016. With Ben Wellings. [Link](#)

‘Anglosphere cooperation given a surprise boost after the Brexit vote’ *London School of Economics British Politics and Policy Blog*, July 26 2016. With Ben Wellings. [Link](#)

‘Euroscepticism and the Anglosphere: Traditions and Dilemmas in Contemporary English Nationalism.’ 2015. *Journal of Common Market Studies*, 60:1, pp. 93-109. With Ben Wellings. [Link](#)

‘Margaret Thatcher and the 1982 Falklands War’ 2015 in Jean Krasno and Sean LaPides, *Personality, Political Leadership and Decision Making: A global perspective*, San Francisco: ABC-CLIO, pp. 155-172

SUMMARY

Dan is the co-founder of Great Hearts Academies, a nationally-acclaimed network of high-performing, liberal arts academies. The core purpose of Great Hearts is to cultivate the hearts and minds of students through the pursuit of Truth, Goodness, and Beauty. As of Fall 2025, Great Hearts serves over 30,000 PK-12 scholars at 50 academies across Arizona, Texas, and Louisiana. Dan currently serves as the Academies Officer, leading the organization's national brick-and-mortar campus growth, in both charter and private schools.

EDUCATION

Santa Clara University

Bachelor's of Arts in English Literature
1991

The Claremont Graduate University

Master of Arts in English Literature/ Honors
1992

The Claremont Graduate University

Ph.D. in English Literature
1998

The University of Birmingham (UK)

Master of Arts in Character Education
2022

KEY ACCOMPLISHMENTS

- Pahara-Aspen Fellow
- Stanford Executive Education program
- Virginia G. Piper Fellow
- Keynote Speaker, Great Hearts Symposium, Colorado Charter Schools Conference, Florida Classical Schools Conference

PUBLICATIONS

- "Speculative Plagues and the Ghosts of *Little Dorrit*" in *Dickens Study Annual*.
- "A Speculative Resurrection: Death, Money, and the Vampiric Economy of *Our Mutual Friend*" in *Victorian Literature and Culture*.
- "Surveying the Vampire" in *Approaches to Teaching Gothic Fiction: the British and American Traditions*.
- Editorials and Essays: *Dallas Morning News*, *Arizona Republic*, *Education Next*.

PROFESSIONAL EXPERIENCE

Chief Academies Officer

Great Hearts | 2022 - Present

Superintendent of Great Hearts Texas & President of the Great Hearts Foundation

Great Hearts | 2019 - 2022

Chief Advancement Officer

Great Hearts | 2015 - 2019

Chief Executive Officer

Great Hearts | 2004 - 2015

Instructor & Headmaster

Tempe Preparatory Academy | 1998 - 2004

Instructor & Basketball Coach

Harvey Mudd College and Pomona College | 1992 - 1998

BOARD MEMBERSHIPS

- Great Hearts America (current)
- Great Hearts Arizona (current)
- Great Hearts Foundation (current)
- Drexel Fund (prior)

PERSONAL

Lives in Mesa, Arizona with wife Tiffany. Father of four daughters, two of whom are Great Hearts graduates and two of whom currently attend Great Hearts.

Jerilyn K Olson

Education

University of Dallas – Dallas, TX	Fall 2021
<ul style="list-style-type: none"> • Master of Humanities, Classical Education Concentration 	
Claremont McKenna College – Claremont, CA	Spring 2005
<ul style="list-style-type: none"> • G.P.A.: 10.62 (3.54 on 4.0 scale) • Bachelor of Arts, Government and Literature 	
Tempe Preparatory Academy – Tempe, AZ	Spring 2001
<ul style="list-style-type: none"> • Graduated with 4.0 GPA; Valedictorian 	

Work Experience

Chief People Officer, Great Hearts – Phoenix, AZ	2022-Present
<ul style="list-style-type: none"> • Lead vision and manage national HR, Benefits, Professional Development, Talent Recruiting, and People Operations Teams for Great Hearts network of schools (nearing 5,000 employees fall 2025) 	
Vice President of Professional Development, Great Hearts – Phoenix, AZ	2017-2022
<ul style="list-style-type: none"> • Defined faculty professional development programs and strategic systems for a growing network • Oversaw regional professional development teams, certification and graduate programs director, and digital resource manager 	
Director of Faculty Development, Great Hearts – Phoenix, AZ	2015-2017
<ul style="list-style-type: none"> • Managed all network training events, including summer onboarding for over 300 teachers in multiple regions • Oversaw all other faculty professional development resources – including independent study scholarships, digital content libraries, and peer coaching relationships 	
Talent Officer, Great Hearts – Phoenix, AZ	2011-2015
<ul style="list-style-type: none"> • Designed interview system that provided initial automatic scoring grid for incoming candidates • Coached school leaders throughout hiring process and assisted in screening and recruiting candidates • Developed relationships with hiring pipelines and managed advertising process for faculty and staff recruitment 	
Teacher, Master Teacher, Varsity Coach, Assistant Athletic Director, Chandler Prep Academy – Chandler, AZ	2005-2011
<ul style="list-style-type: none"> • Teacher – Literature and Composition (7th and 8th grades); Humane Letters (9th and 12th grades) • Master Teacher – 2008-2011: Humanities, Fine Arts, and Foreign Languages • Assistant Athletic Director – 2010-2011: oversaw scheduling, website, and participant forms • Varsity Coach – 2005-2012: Women’s Volleyball, Women’s Basketball, Men and Women’s Track and Field 	
Curriculum Consultant and Writing Curriculum Committee Member, Great Hearts – Phoenix, AZ	2009-2010
<ul style="list-style-type: none"> • Curriculum Consultant: trained, provided resources for, and formally evaluated new teachers across the Great Hearts network for the Junior High Humanities • Writing Curriculum Committee: Wrote and edited portions of the Great Hearts Writing Manual 	
Intern, Office of Presidential Personnel, The White House – Washington D.C.	Fall 2003
<ul style="list-style-type: none"> • Aided senior White House staff and his deputies in their duties staffing PA and PAS level positions for the Federal government, including the DOJ, DHS, and HUD • Assisted with the composition and compilation of candidate and appointee review books for the POTUS; researched and vetted candidate background information and gathered biographical details 	
Private Tutor – Phoenix, AZ	2001-2003, 2007-2010
<ul style="list-style-type: none"> • Tutored students (Grades 3-12) in Literature, English, Spanish, Algebra, Calculus, Organization Techniques, and Writing Skills • Consulted with parents regarding children’s ability and progress 	
Research Assistant in Literature Department, Claremont McKenna College – Claremont, CA	2002-2003
<ul style="list-style-type: none"> • Gathered and presented information for a Literature Professor to be used in research publications and teaching • Learned extensive research skills and developed a proficiency with office tools 	

PROFILE

I am the Chief Academic Officer with Great Hearts Academies in Phoenix, AZ. Great Hearts is the largest provider of K-12 classical liberal arts education campuses in the county.

EXPERIENCE**GREAT HEARTS ACADEMIES, PHOENIX, AZ — JULY 2014-PRESENT**

I started as a Director of Curricular Projects, was elevated to National Director of Curriculum, the Vice President of Curriculum, and finally the Chief Academic Officer. I oversee the curriculum team, the academic success and accessibility team, and the Great Hearts Institute. Great Hearts is a rapidly expanding system of public K-12 charter schools in Phoenix, San Antonio, Dallas/Fort Worth, and Baton Rouge, serving over 25,000 students in 40 schools. I am responsible for overseeing academics in all geographic regions. This includes supporting teachers through careful professional development, major curricular revisions, and ground-up curricular development.

DELAWARE CITY SCHOOLS, DELAWARE, OH — JUNE 2011-JULY 2014

Directed the gifted and enrichment program. Coordinated with homeschooling families. Oversaw the Student Information System, the district's central enrollment process (including residency and custody issues), enrollment projections, and the State EMIS reporting system. Coordinated with the Ohio Department of Education on funding issues related to student enrollment. Served as the suspension and expulsion hearing officer. Supported the Curriculum and Special Education departments including IEP writing, intervention strategies, State and Federal compliance, and Civil Rights processes. Supervising the district nursing staff. Overseeing a multi-departmental budget. Serving as the district custodian of student records. Directing the writing and approval of student handbooks and board policies.

UPPER ARLINGTON HIGH SCHOOL, UPPER ARLINGTON, OH — 2002-2011

Taught mathematics courses ranging from Algebra up through AP and IB Calculus. Taught computer science courses at the introductory and AP levels. Co-taught an Intervention Geometry class for students with special needs. Chaired a committee to increase AP and IB student enrollment. Led the yearly construction of the master schedule, including the development of a software program that decreased the scheduling time by two-thirds. Implemented a multi-year Technology Implementation Plan for the high school.

THE PONTIFICAL COLLEGE JOSEPHINUM, COLUMBUS, OH — 2006-2011

Taught five different mathematics courses: Philosophy of Mathematics, College Algebra, Business Mathematics, Statistics, and Computer Science.

THE OHIO STATE UNIVERSITY, COLUMBUS, OH — 2000-2008

Served as a Graduate Fellow and a Graduate Instructor for two years. Taught in and helped to coordinate the Ross Mathematics Program for Teachers: two intensive graduate level courses in Number Theory and Advanced Euclidean Geometry offered to high school teachers during the summer.

HUTCHISON ENTERPRISES — 2007-PRESENT

Wrote and edited ancillary materials for mathematics textbooks ranging from Algebra through Calculus: Teacher Guides, Student Review Texts, Extra Practice Books, Solutions Manuals, and Sample Lesson Plans.

EDUCATION

The Ohio State University, Columbus, OH — M.S. in Mathematics, 2001

Denison University, Granville, OH — B.S. in Mathematics and Computer Science, *Summa Cum Laude*, 2000

Lake High School, Uniontown, OH — *Summa Cum Laude* and Valedictorian, 1996

PROFESSIONAL INVOLVEMENT

Main Street Delaware Board of Directors, Secretary, 2013-2014

Columbus Diocesan Pastoral Council, 2006-2104

AP Computer Science Reading, 2009, 2008, 2005, 2004

Denison University Board of Trustees, 2000-2003

HONORS

Denison University Presidential Medal - The highest award Denison University bestows upon graduating seniors

Barry Goldwater National Scholarship for Excellence in Science, Engineering, and Mathematics

Phi Beta Kappa National Academic Honor Society

Mortar Board National Service Honor Society

Denison University Anderson Science Scholarship - full tuition

WORK EXPERIENCE

GreatHearts America

Director of Governance

July 2021 - Present

- Continue with the GH Arizona duties at the national level
- Providing guidance and support to ensure the organization operates within legal boundaries
- Coordinator for board meetings for nine plus boards and committees

GreatHearts Arizona

Governance and Compliance Specialist

September 2019 – July 2021

- Designing and developing governance frameworks that align with GH policies and regulatory requirements
- Overseeing the implementation and ongoing monitoring of GH Compliance
- Ensuring compliance with relevant regulations and regulatory agencies
- Creating and maintaining comprehensive governance policies, standards, and procedures
- Preparing renewals, reports, board packets and communicating governance/charter-related information to relevant parties
- Maintain AZ academies websites to ensure they align with all compliance requirements
- Coordinator for board meetings for both AZ Boards.

Arizona State Board for Charter Schools

Office Manager

February 2018 - September 2019

- Continue duties of the Executive Assistant
- Organize and maintain digital, physical and data management files
- Updated the Board's Record Retention schedule
- Create fillable PDF forms
- Live-stream coordinator for public meetings.

Executive Assistant

September 2015 - February 2018

- Coordinate and prepare organizational meetings
- Maintain and track charter contacts and account information
- Document preparation for charter contracts, letters and emails
- Provide technical assistance to applicants and the general public
- Process orders, forms, applications and requests
- Communicate and coordinate with internal and external departments
- Maintain website and ASBCS Online database
- Subject matter expert for legal and deposition requirements

Constituent Services Specialist

July 2010 - September 2015

- Answered inquiries from constituents via telephone, email and post mail
- Provided technical assistance to charter school operators, parents and stake holders
- Prepared and processed Board meeting materials
- Maintained physical documents and data entry
- Purchased office supplies and equipment
- Responded promptly to customer inquiries and handle customer complaints
- Deposit and accounting for incoming payments and refunds

EDUCATION

2003 High School Diploma - Independence High School

SKILLS

Knowledge in Arizona State Revised Statute-Title 15, Arizona State Library, Archives and Public Record's Retention standards and schedules, Microsoft Office, Google, Adobe Pro, ASBCS Online System, HRIS, ProcureAZ, I-9, Computer processing, Typing, Public Notary

Appendix 5: Charter Board Member Resumes

Great Hearts Louisiana Board

Ty Gose – Board Chairman



Ty, a San Antonio native, joined NAI Latter & Blum, Louisiana’s leading commercial real estate company, in 2004 after graduating with a Business/ Economics Degree from Wheaton College in Chicago, IL. While at Wheaton, Ty competed as a pole vaulter and also captained the Wheaton Football team to the best record in the school’s 100 year sports history. Ty earned Rookie of the Year in his first year at NAI Latter and Blum and has finished top 3 in production every year since for the Baton Rouge office. In 2013 Ty finished top 3 for Latter and Blum corporate and in 2014 was the top agent company-wide with over \$110,000,000 in sales volume. In 2015, Ty was the #2 producer company wide.

Over the last few years Ty has played an integral role in the formation of three separate divisions at Latter and Blum: Multi-Family, Office and Retail. The Office Division handles leasing for over 2,000,000 SF in Baton Rouge. The Retail Division is currently working on four mixed use developments: The Settlement at Willow Grove, The Grove, Rouzan and River House which combine for over 650,000 SF of planned retail development over the next several years. Access to such a wide swath of deals allows Ty insight into real time market changes as well as supply gaps and imbalances that provide value for developers, tenants and investors.

Adonica Pelichet Duggan – Board Vice-Chairman



A Baton Rouge native, Adonica Pelichet Duggan brings nearly 20 years of public education experience to her role as CEO of the newly formed Baton Rouge Alliance for Students. Her experience most recently includes managing external affairs for New Schools for Baton Rouge and leading a successful rebranding of the East Baton Rouge Parish School System while serving as Chief of Communications there for two years. During that time, she served as the district spokesperson and handled all media relations.

A McKinley High graduate, Duggan is an advocate for quality educational options in our community and passionate about Baton Rouge and the city’s children. Prior to accepting a position in East Baton Rouge Parish Schools, Duggan spent more than a decade in leadership of the Zachary Community School District working to establish the first new school district in the state in more than 60 years. Her work there earned awards from the National School Public Relations Association as well as national recognition for community engagement in a school district website.

Duggan is a graduate of the Manship School of Mass Communication at LSU. She is active in supporting a number of local nonprofits serving as a current board member for the YMCA of the Capital Area, Rocketkidz Foundation and the Alumni Board of the Manship School. She is an active Rotarian and a member of the Baton Rouge Business Report’s 2016 Forty Under 40 and Leadership Baton Rouge Class of 2019.



David Whidden – Board Secretary

David is an assistant professor of theology at Our Lady of the Lake College, a small Franciscan college located in Baton Rouge, Louisiana. He completed his doctoral work in systematic theology at Southern Methodist University in 2011, writing his dissertation on the theology of light in Thomas Aquinas, under the guidance of Bruce Marshall.



Erin Franco – Board Director

Erin, along with her Husband, Michel, are currently the National Couple responsible for the English-speaking Domestic Church movement in the United States. Erin has a Bachelor of Science in Mass Communications from Louisiana State University. Erin is a wife, speaker, writer, Louisiana girl, and mother of six children.



James “Jim” Stoner – Board Director

James R. Stoner, Jr. is the Hermann Moyse, Jr., Professor and Director of the Eric Voegelin Institute in the Department of Political Science at Louisiana State University, where he has taught since 1988. He is the author of *Common-Law Liberty* (Kansas, 2003) and *Common Law and Liberal Theory* (Kansas, 1992), and co-editor of five books, most recently *Free Speech and Intellectual Diversity in Higher Education* (Lexington Books, 2023) with Paul O. Carrese and Carol McNamara. He earned his Ph.D. from Harvard University and his A.B. from Middlebury College.

Great Hearts Lake Charles



Ty Gose, SIOR, CCIM
Associate Broker

NAI Latter & Blum

Scope of Service Experience

Ty, a San Antonio native, joined NAI Latter & Blum in 2004 after graduating with a Business/Economics Degree from Wheaton College in Chicago, IL. While at Wheaton, Ty captained the Wheaton Football team to the best record in the school's 100 year sports history. Ty earned Rookie of the Year in his first year at NAI Latter and Blum and has finished top 3 in production every year since for the Baton Rouge office. In 2014 he was the top agent company wide with over \$110,000,000 in sales volume. In each of the six years following, Ty has been top agent for the company in all but two. In 2019, he was in the Top 20 producers Globally for NAI, and in 2020 was Top 10 in the same category.

Over the last few years Ty has played an integral role in the formation of three separate divisions at Latter and Blum: Multi-Family, Office and Retail. Since 2004 Ty has participated in over \$1 Billion of transaction volume. Access to such a wide swath of deals allows Ty insight into real time market changes as well as supply gaps and imbalances that provide value for developers, tenants and investors.

Professional Affiliations & Designations

- NAI Global Top 20 Producers Worldwide
- Baton Rouge Office Trends Presenter (2017-2020)
- CCIM – Certified Commercial Investment Member
- BRAC Leadership Program Graduate
- Baton Rouge Rotary
- Good Growth Coalition
- Greater Baton Rouge Top 40 Under 40
- Greater Baton Rouge Association of Realtors (GBRAR)
- Commercial Investment Division (CID)
- Chamber of Commerce – Baton Rouge
- Board Member – Heritage Ranch
- Past Board Member – Young Life of Baton Rouge
- Past Chairman of the Board – Manners of the Heart

Background & Experience

- Office Leasing & Sales
- Mixed Use Development Consulting
- Investment Sales
- Tax-Deferred Exchanges
- Property Analysis and Consulting

Education

Wheaton College, Wheaton, IL, B.A. 2004

Contact

www.linkedin.com/in/adonica-duggan (LinkedIn)
www.visualcv.com/adonicapduggan (Portfolio)

Top Skills

Educational Technology
Technology Integration
Web Design

Honors-Awards

2012 Golden Achievement Award
SchoolE Website Awards
Baton Rouge Business Report's
2016 Forty Under 40

Adonica Pelichet Duggan

Chief Executive Officer at Baton Rouge Alliance for Students
Baton Rouge Metropolitan Area

Summary

Public education advocate with extensive senior level experience, passionate about quality K12 schools for all children, well-versed in all aspects of strategic communications.

Experience

Baton Rouge Alliance for Students
Chief Executive Officer
March 2021 - Present (5 years)
Baton Rouge, Louisiana, United States

New Schools for Baton Rouge
3 years 8 months

Executive Director of External Affairs
October 2019 - March 2021 (1 year 6 months)
Baton Rouge, Louisiana

Works in partnership with community to ensure equitable access to high quality K-12 education for every student in Baton Rouge.

Managing Director of External Affairs
August 2017 - October 2019 (2 years 3 months)

East Baton Rouge Parish School System
Chief of Communications & Public Relations
July 2015 - August 2017 (2 years 2 months)
Baton Rouge, LA

Responsible for all aspects of marketing and communications for Louisiana's second largest school district. Envisioned and executed rebranding effort. Established strong working relationship with area media resulting in substantially increased positive news coverage. Redesigned school district website and coordinating network of more than 70 school sites to increase stakeholder engagement. Handled crisis communications for organization of more than 6,000 employees.

Zachary Community School Board

12 years 5 months

Supervisor of Technology & Communications

July 2013 - July 2015 (2 years 1 month)

Zachary, LA

Provide communication strategy and guidance for Superintendent, School Board and administrative team. Strong performance in community event planning and parental involvement activities. Excellent experience in public education communications engaging all stakeholders. Planned and executed marketing campaign for several successful bond programs. Designed and developed successful network of award-winning school district websites.

Communications Coordinator

March 2003 - July 2013 (10 years 5 months)

Baton Rouge Parents Magazine

Editor

November 2000 - October 2002 (2 years)

Managed editorial content through the establishment of an editorial calendar and generating feature story ideas. Also coordinated production schedule and supervised freelance and staff writers. Other duties included advertising design and cover concept and layout.

Lamar Advertising

Graphic Artist - Interstate Logos

January 2000 - January 2001 (1 year 1 month)

Prepared client art for production and printing. Assisted with artwork for internal communications for Interstate Logos division.

Education

Louisiana State University

Bachelor of Arts (B.A.), Mass Communication/Media Studies · (1995 - 1998)

DAVID L. WHIDDEN III, Ph.D.
Curriculum Vitae

Franciscan Missionaries of Our Lady University
Liberal Arts & Social Sciences Department

EDUCATION

Southern Methodist University, Dallas, TX
Graduate Program in Religious Studies
Ph.D. in Systematic Theology, December 2011
Dissertation: “The Role of Light in the Theology of Thomas Aquinas”
Advisor: Bruce D. Marshall

Southern Methodist University, Dallas, TX
Perkins School of Theology
Masters in Theological Studies, 2006
Summa cum Laude

University of Florida, Gainesville, FL
College of Business Administration
Masters of Business Administration, 1995

Stetson University, DeLand, FL
Bachelor of Arts in History, 1989

TEACHING EXPERIENCE

2019- *Professor of Theology, Franciscan Missionaries of Our Lady University*
2015-19 *Associate Professor of Theology, Our Lady of the Lake College*
2011-15 *Assistant Professor of Theology, Our Lady of the Lake College*
 Courses taught: Introduction to Theology, History and Theology of St. Francis (online), Old Testament, New Testament, Catholic Social Teaching (online), Science and Christianity (online), Church History, Trinitarian Theology, Sacraments, Philosophy and Theology.

2007-10 *Graduate Student in Systematic Theology*
 Courses taught: Systematic Theology I and II (2008-09), Monastic Spirituality (2007-2009), Theology of Thomas Aquinas (Spring 2010, Teaching Assistant)

PUBLICATIONS AND PRESENTATIONS

Books

Christ the Light: The Theology of Light and Illumination in Thomas Aquinas. Fortress Press.
July 2014.

Articles

“The Theology of Play and the Play of Theology in Thomas Aquinas.” *The Thomist*, volume 80, number 2 (2016): 273-84.

“From Bitter to Sweet: Humility and Service at Franciscan Colleges and Universities.” *The AFCU Journal: A Franciscan Perspective on Higher Education*, volume 10, number 1 (2013): 26-36.

“The Alleged Feudalism of Anselm’s *Cur Deus Homo* and the Benedictine Concepts of Obedience, Honor, and Order.” *Nova et Vetera* (English edition), volume 9, number 4 (2011): 1055-87.

Digital Humanities Project

The Thomas Aquinas Scripture Database, www.aquinasscripture.com. A searchable database of over 10,000 of Aquinas’s scripture citations in his major theological works (currently under construction).

Book Reviews

Atonement, by Eleanore Stump. *The Thomist*, volume 83, number 3, (July 2019): 471-474.

Reading Sacred Scripture with Thomas Aquinas: Hermeneutical Tools, Theological Questions and New Perspectives, by Piotr Roszak, and Jörgen Vijgen, eds. *Nova et Vetera* (English edition), volume 18, number 1 (Winter 2020): 331-335.

Aquinas’s Theory of Perception: An Analytic Reconstruction, by Anthony J. Lisska. *The Thomist*, volume 81, number 4, (October 2017): 625-628.

Dust Bound for Heaven: Explorations in the Theology of Thomas Aquinas, by Reinhard Hütter, *Theology Today*, volume 73, number 2, (July 2016): 185-187.

Academic Presentations

“Anselm and Aquinas on the Satisfaction of Christ,” Thomas Aquinas and the Crisis of Christology, A Conference at Ave Maria University (February 2020)

“God Loves a Cheerful Giver: The Performance of Satisfaction in the *Cur Deus Homo*,” Anselm of Canterbury: Order, Nature and the Divine, The International Association for Anselm Studies Conference, Durham University (July 2019)

“One is the Loneliest Number: The Curious Case of the Single Gloss in the *Summa Contra Gentiles*,” Aquinas the Biblical Theologian, A Conference at Ave Maria University (February 2019)

“Sin and the Structure of the *Cur Deus Homo*,” St. Anselm of Aosta, Bec and Canterbury: Theologian, Statesman, Administrator, Teacher, A Conference at The University of Houston and The University of St. Thomas (May 2018)

“Justice and Mercy in God, On the Cross, and in the Classroom: Anselm of Canterbury’s Changing Thought.” *Catholic Theological Society of America*. (June 2016)

“The *Proslogion*, Gilbert Crispin, and the *Cur Deus homo*: Anselm’s Student and the Problems of the Incarnation.” *Reading Anselm: Context and Criticism Conference*. (July 2015)

“Thomas Aquinas’s Theology of Play and the Play of Theology.” *Catholic Theological Society of America*. (June 2014)

“Kissing the Lepers: Who Do Franciscan Universities Serve?” *Association of Franciscan Colleges and Universities Symposium* (June 2012)

“The Alleged Feudalism and the Benedictine Concepts of Obedience, Honor, and Order in Anselm’s *Cur Deus Homo*.” *Mid-America Medieval Association Annual Conference* (February 2010)

Public Presentations

Hidden Heroes: Heroic Spirituality in Everyday Life. Knights of Columbus, St. Margaret, Queen of Scotland, Albany, LA. February 2020.

The Flower of Sharon: The Ongoing Development of the Diaconate After Vatican II. A presentation to the deacons of Baton Rouge. June 2019.

Advent: Unwrapping the Gift of Christmas. A three-part Advent series on Christ and the sacraments at St. Aloysius Catholic Church, Baton Rouge. Winter 2017.

The Creed: What Do We Mean when We Say ‘I Believe’? A three-part Lenten series at St. Margaret, Queen of Scotland, Albany, LA. Spring 2017.

The Creed: What Do We Mean when We Say ‘I Believe’? A six-part Lenten series at St. Aloysius Catholic Church, Baton Rouge. Spring 2016.

Living a Life of Faith Seeking Understanding. St. Margaret, Queen of Scotland, Albany, LA.
April 17, 2016.

PROFESSIONAL SERVICE

International Association for Anselm Studies. Board of Directors, 2015-present.

Catholic Theological Society of America. Thomas Aquinas Consultation, administrative team,
2015-17.

Association of Franciscan Colleges and Universities. Task Force on Faculty Development and
the Franciscan Intellectual Tradition. 2012-15.

INSTITUTIONAL SERVICE

2011- *Franciscan Missionaries of Our Lady University*
Faculty Senate, President
Institutional Development Committee
Campus Ministry Task Force
Campus Technology Committee
Presidential Search Committee
School of Nursing Dean Search Committee
Library Committee

AWARDS, FELLOWSHIPS, GRANTS, AND CERTIFICATES

2020 *High School Youth Theology Institutes at Colleges and Universities Sustainability Grant* – \$223,170, Lilly Endowment, Inc.

2016 *High School Youth Theology Institutes at Colleges and Universities* – \$446,692
Lilly Endowment, Inc.

2013 *NetVUE Program Development Grant* – \$47,350
Council of Independent Colleges

2013 *Wabash Center Summer Research Fellowship* – \$5,000
Wabash Center for Teaching and Learning in Theology and Religion

2012-3 *Teaching and Learning Workshop for Pre-Tenure Religion Faculty in Colleges and Universities*
Wabash Center for Teaching and Learning in Theology and Religion

2012 *NetVUE Campus Visit Grant* – \$3,400

Council of Independent Colleges

- 2012 *Online Teaching and Learning Certificate*
 United Theological Seminary – Five courses in online pedagogy
- 2011-12 *Schubert M. Ogden Fellowship for Academic Excellence in Theology* – \$6,000
 Southern Methodist University Graduate Program in Religious Studies

MEMBERSHIPS

American Academy of Religion
Catholic Theological Society of America
Boston Colloquy in Historical Theology
International Association for Anselm Studies

FUNDRAISING EXPERIENCE

UNIVERSITY OF TEXAS MEDICAL BRANCH, Galveston, Texas

Director of Advancement Services and Annual Giving (1/99 – 8/04)

UTMB's Office of University Advancement was in the process of reorganizing its development efforts to focus on major gifts when I was hired. I was brought in to lead six employees in advancement services and annual giving, with the goal of creating the infrastructure necessary to support a first-class major gift effort. In my final year at UTMB I assumed additional responsibility for our research operation, bringing the total number of employees reporting to me to ten. I was also responsible for inaugurating a compliance program for over 400 university endowments valued at over \$300 million. Under my leadership, our office supported our development efforts through the following accomplishments:

- Drafted, proofed, submitted, and recorded over 75 endowment gift agreements and gifts. Developed institutional policies regarding endowments and institutional endowment compliance plan. Serve as institutional representative on UT System compliance committee.
- Created and led university-wide endowment compliance committee. Developed risk assessment tools to identify endowments that carried greatest risk to the university.
- Developed on-line training program for endowment compliance that was required for all faculty and staff who had fiduciary responsibility for endowment expenditures.
- Met with key faculty and deans to review endowment compliance efforts and develop strategies for appropriate uses of endowment funds.
- Created institutional donor recognition dinner for major gift contributors. Most recent dinner included 350 attendees and over 25 honorees recognized for gifts of at least \$50,000.

- Developed Faculty Awards Luncheon, an annual luncheon where contributors of endowed positions met faculty who had been appointed as holders of professorships and chairs in the previous year.
- Responsible for small major gifts portfolio, with gifts totalling over \$2 million over five years.
- Worked with volunteer leaders of UTMB President's Cabinet to grow membership of \$1,000+ lead annual giving contributors from 220 to over 300.
- Managed institutional facilities naming program by assigning minimum naming requirements for all buildings on campus, as well as individual areas within buildings.
- Developed new management reports to track contacts, proposals, next steps, and prospect lists.
- Developed new monthly reports and revised existing reports to track progress toward institutional fund raising goals.
- Worked to electronically input information from rating and screening sessions and led successful effort to conduct Grenzebach, Glier, and Associates Prospect Profile electronic screening.
- Created on-line data request and gift submission web page for internal use of employees.
- Identified address correction firms and implemented program to update addresses continuously. Increased number of good addresses by 14% and good phone numbers by 23%. Removed over 750 duplicate addresses from database.
- Instituted expectation that all gift receipts would be mailed within 24 hours of office receiving check.
- Implemented payroll deduction giving for faculty and staff, as well as on-line giving option for all contributors.
- Led effort to develop stewardship tabloid *Legacies* for over 1,500 major gift and lead annual donors.
- Centralized annual giving efforts for all four UTMB schools, resulting in increased time for directors of development to spend on major gifts.
- Began to electronically track attendance at special events to provide better information on scope of individual involvement with university.

Great Hearts Lake Charles

UNIVERSITY OF FLORIDA FOUNDATION, Gainesville, Florida

Assistant Campaign Director (1/96 - 1/99)

Assisted with all areas of campaign planning and execution for \$500 million campaign. Responsibilities and accomplishments include:

- Helped identify over 3,500 major gift prospects through peer rating and screening program.
- Staffed Campaign Steering Committee and Leadership Gifts Committee.
- Worked on all phases of campaign kickoff dinner.
- Ran regional campaigns in areas where I had completed ratings and screenings.
- Developed and distributed campaign reports and refined campaign goals for colleges.
- Worked with all phases of campaign communications: publications, video, and public relations.

Associate Director of Annual Giving (3/93 – 11/95)

Acting Director of Annual Giving (11/92 – 2/93) (10/94 – 12/94) (11/95 – 8/96)

Assistant Director of Annual Giving (8/90 – 11/92)

- Annual fund grew from \$1.2 million to \$2.8 million during tenure.
- Managed two professional and two secretarial staff during time as Acting Director.
- Collaborated with college deans and development officers to develop strategic plans for college specific annual fund efforts.
- Created annual budget, monitored expenditures, and rebilled colleges for annual giving expenses.
- Developed themes, wrote copy, coordinated design, and implemented mailings of over 600,000 pieces annually.
- Hired, trained, managed payroll, and supervised 120 paid students for year-long phonathon program with a goal of \$1.2 million pledged.


STETSON UNIVERSITY, DeLand, Florida


Annual Fund Assistant (6/89 – 8/90)

Responsibilities:

Worked as liaison with Class of 1980 Reunion Gifts Committee in inaugural class reunion program. Researched and identified potential prospects for committee membership for following year. Also worked on phonathon, direct mail, Parents Council program, and gift acknowledgements.



 www.erinfranco.com

 Baton Rouge, La.

PERSONAL PROJECTS

I have been a writer, radio personality, retreat facilitator and speaker in the Catholic ministry world since 2009.

My ministry activities are based at ErinFranco.com.

EDUCATION

**Louisiana State University,
2004-2008**

Bachelor of Science in Mass
Communications

ERIN FRANCO

LEADERSHIP EXPERIENCE

The Domestic Church Movement | U.S. National Couple
January 2022 - Present

- My husband and I currently lead the Domestic Church movement for the United States
- We sit on the board for the movement's U.S. non-profit

The Domestic Church Movement | Various Roles
January 2014 - January 2022

- I have served in a variety of pioneering diocesan, regional, national, and event leadership roles both individually and together with my husband

WORK EXPERIENCE

I have directed marketing and public relations strategy and messaging for both in-house and agency roles.

Rockit Science Agency | Brand Manager

February 2022 - Present

- Senior project management, public relations, writing, strategy, messaging, and website design

Red Stick Visual Solutions | Co-owner

December 2020 - Present

- Marketing, branding, strategy, messaging, and website design both in-house and for clients

Pennino and Partners | Public Relations Coordinator

May 2009 - May 2011

- Public relations writing, strategy, and outreach

CURRICULUM VITAE [short]
[August 2024]

James R. Stoner, Jr.

e-mail: poston@lsu.edu
<http://www.lsu.edu/jamesstoner>

EDUCATION

Ph.D., Harvard University, Political Science, 1987
M.A., Harvard University, Political Science, 1980
A.B., Middlebury College, summa cum laude, 1977

ACADEMIC POSITIONS

Louisiana State University: Hermann Moyse, Jr., Professor and Director, Eric Voegelin Institute for American Renaissance Studies (2015-); Professor of Political Science (2003-); Department Chairman (2007-2013); Acting Dean of Honors (Fall 2010); Director of Graduate Studies in Political Science (1996-2000); Associate Professor (1994-2003); Assistant Professor (1988-1994)

Princeton University: Garwood Visiting Professor and Visiting Fellow in the James Madison Program in American Ideals and Institutions, in the Department of Politics (2013-2014); Visiting Fellow in the Madison Program (2002-2003)

Goucher College: Instructor of Politics and Public Policy (1983-1988); Chairman of Prelegal Studies (1984-1988)

Harvard University: Teaching Fellow in Government (1979-1983); Assistant Head Tutor in Government (1981-1983)

BOOKS (Authored)

Common-Law Liberty: Rethinking American Constitutionalism [a series of essays on the interplay between modern liberalism and the common law heritage in American constitutional history and in constitutional law today] (Lawrence: University Press of Kansas, 2003)

Common Law and Liberal Theory: Coke, Hobbes, and the Origins of American Constitutionalism [a study of the origin and development of the doctrines that form American constitutionalism, in particular the doctrine of judicial review, from sources in the English common law on the one hand and liberal political philosophy on the other] (Lawrence: University Press of Kansas, 1992; paperback, 1994)

BOOKS (Co-edited)

Edited, with Paul O. Carrese and Carol McNamara, *Free Speech and Intellectual Diversity in Higher Education* [essays from a conference at the School of Civic and Economic Thought and Leadership at Arizona State University] (Lanham, MD: Lexington Books, 2023)

Edited, with Alan Levine and Thomas W. Merrill, *The Political Thought of the Civil War* [essays on the political thought of the North and the South before, during, and after the American Civil War] (Lawrence: University Press of Kansas, 2018; paperback, 2019)

Edited, with Harold James, *The Thriving Society: On the Social Conditions of Human Flourishing* [essays from scholars in a variety of fields on topics such as the person, the family, law and politics, the university, and the economy] (Princeton, NJ: Witherspoon Institute, 2015)

Edited, with Donna M. Hughes, *The Social Costs of Pornography: A Collection of Papers* [essays from scholars in a variety of fields on the topic] (Princeton, NJ: Witherspoon Institute, 2010)

Edited, with Samuel Gregg, *Rethinking Business Management: Examining the Foundations of Business Education* [essays offering person-centered perspectives on business management, business ethics, and business education] (Princeton, NJ: Witherspoon Institute, 2008); republished, with several chapters dropped or added, as *Profit, Prudence and Virtue: Essays in Ethics, Business and Management* (Exeter, UK: Imprint Academic, 2009)

SCHOLARLY ARTICLES AND BOOK CHAPTERS

“Custom, Constitution, and Civil Society,” in Dariusz Makieła, *Origins and Sources of Modern Constitutionalism in Europe: Law and Ideas* (Warsaw: UEHS Press, 2023/4), pp. 113-118

“Republican Integralism: Its Roots and Deracination in American Politics,” in Kenneth L. Grasso and Thomas F.X. Varacalli, eds., *The Future of the Catholic Church in the American Political Order* (Steubenville, OH: Franciscan University Press, 2023), pp. 122-139

“Was John Stuart Mill Right about Freedom of Speech?” in James R. Stoner, Jr., Paul O. Carrese and Carol McNamara, eds., *Free Speech and Intellectual Diversity in Higher Education* (Lanham, MD: Lexington Books, 2023), pp. 135-151

“Was the Constitution Supposed to be Democratic?,” *Drake Law Review* 70: 629-642 (2023)

“What Publius Knew and Didn’t Know,” in Steven F. Pittz and Joseph Postell, eds., *American Citizenship and Constitutionalism in Principle and Practice* (Norman: University of Oklahoma Press, 2022), pp. 140-157

“Continuity without Corruption: The Political Theology of Death in St. Augustine,” in Erin A. Dolgoy, Kimberly Hurd Hale, and Bruce Peabody, *Political Theory on Death and Dying* (New York: Routledge, 2022), pp. 132-140

“Was Justice Joseph Story a Christian Constitutionalist?” in Daniel L. Dreisbach and Mark David Hall, eds., *Great Christian Jurists in American History* (New York: Cambridge University Press, 2019), pp. 144-160

“Civil Society and Social Justice: A Prospectus,” *The Independent Review: A Journal of Political Economy* 24 (1): 85-94 (Summer 2019)

“The Case of the Confederate Constitution,” in Alan Levine, Thomas W. Merrill, and James R. Stoner, Jr., eds., *The Political Thought of the Civil War* (Lawrence: University Press of Kansas, 2018), pp. 273-289

“Aristotelian Metaphysics and Modern Science: Leo Strauss on What Nature Is,” in Geoffrey M. Vaughan, ed., *Leo Strauss and His Catholic Readers* (Washington, DC: The Catholic University of America Press, 2018), pp. 277-289

“Are Academic Freedom and Freedom of Speech Congruent or Opposed?” in Donald Alexander Downs and Chris W. Surprenant, eds., *The Value and Limits of Academic Speech: Philosophical, Political, and Legal Perspectives* (New York: Routledge, 2018), pp. 64-77

“Comments on Alexander’s *Law and Politics: What Is Their Relation?*” *Harvard Journal of Law & Public Policy* 41(1): 369-372 (Winter 2018)

“Progressivism, Social Science, and Catholic Social Teaching in the Building of the American Welfare State,” in Bradley C.S. Watson, ed., *Progressive Challenges to the American Constitution: A New Republic* (New York: Cambridge University Press, 2017), pp. 160-170

“Categories and Causes: Physics and Politics for Aristotle and for Us,” in R.J. Snell and Steven F. McGuire, eds., *Concepts of Nature: Ancient and Modern* (Lexington Books, 2016), pp. 101-115

“The Polis, the State, and the Constitution,” in Giorgi Areshidze, Paul O. Carrese, and Suzanna Sherry, eds., *Constitutionalism, Executive Power, and the Spirit of Moderation: Murray P. Dry and the Nexus of Liberal Education and Politics* (Albany: SUNY Press, 2016), pp. 223-240

“Does the Law and the Constitution of the Family Have to Change?” *Perspectives on Political Science* 45 (2016): 80-86; reprinted in Patrick N. Cain and David Ramsey, eds., *American Constitutionalism, Marriage, and the Family: Obergefell v. Hodges and U.S. v. Windsor in Context* (Lanham, Md.: Lexington Books, 2016)

“Why We Respect the Dignity of Politics,” in James R. Stoner, Jr. and Harold James, eds., *The Thriving Society: On the Social Conditions of Human Flourishing* (Princeton, NJ: Witherspoon Institute, 2015), pp. 81-96

“Images of the Statesman in *Utopia*,” in Travis Curtright, ed., *Thomas More: Why Patron of Statesman?* (Lanham, Md.: Lexington Books, 2015)

“From Magna Carta to the Montgomery March: Common Law and Civil Rights,” *Faulkner Law Review*, vol. 6, no. 1 (Fall 2014), pp. 49-63

“Catholicism and the Constitution,” in Paul R. DeHart and Carson Holloway, eds., *Reason, Revelation, and the Civic Order: Political Philosophy and the Claims of Faith* (DeKalb, IL: NIU Press, 2014)

“Rational Compromise: Charles Evans Hughes as a Progressive Originalist,” in Joseph Postell and Johnathan O’Neill, eds., *Towards an American Conservatism: Constitutional Conservatism during the Progressive Era* (New York: Palgrave Macmillan, 2013)

“Locke’s Explanation of How the Science of Civil Society Corrects the Natural Authority of Virtue,” in Peter Augustine Lawler and Marc Guerra, eds., *The Science of Modern Virtue: Descartes, Darwin, and Locke* (DeKalb, IL: NIU Press, 2013)

“The Justice of the Market and the Common Good: Justice Sutherland’s Debate,” in Francis J. Beckwith, Robert P. George, and Susan McWilliams, eds., *A Second Look at First Things: A Case for Conservative Politics (The Hadley Arkes Festschrift)* (South Bend, IN: St. Augustine’s Press, 2013)

“Comment on Ralph Hancock, *The Responsibility of Reason: Theory and Practice in a Liberal-Democratic Age*,” *Perspectives on Political Science* 42: 43-46 (2013)

“Natural Law and Property Rights,” with Samuel Gregg, in Samuel Gregg and Harold James, eds., *Natural Law, Economics, and the Common Good: Perspectives from Natural Law* (Exeter, UK: Imprint Academic [St Andrews Studies in Philosophy and Public Affairs], 2012), pp. 121-153

“Freedom, Virtue, and the Politics of Regulating Pornography,” in Donna M. Hughes and James R. Stoner, Jr., *The Social Costs of Pornography: A Collection of Papers* (Princeton, NJ: Witherspoon Institute, 2010), pp. 193-213

“Who Has Authority over the Constitution of the United States?” in Steven Kautz, Arthur Melzer, Jerry Weinberger, and M. Richard Zinman, eds., *The Supreme Court and the Idea of Constitutionalism* (Philadelphia: University of Pennsylvania Press, 2009), pp. 95-111, 270-272

“Magnanimity and Martyrdom: The Death and Life of Thomas More,” in Carson Holloway, ed., *Magnanimity and Statesmanship* (Lanham, MD: Lexington Books, 2008), pp. 133-143

“Natural Law, Common Law, and the Constitution,” in Douglas E. Edlin, ed., *Common Law Theory* (Cambridge: Cambridge University Press, 2007), pp. 171-184

“The ‘Naked’ University: What if Theology Is Knowledge, Not Belief?,” *Theology Today*, vol. 62, no. 4 (January 2006), pp. 515-527

“Is There a Political Philosophy in the Declaration of Independence?,” *Intercollegiate Review*, vol. 40, no. 2 (Fall/Winter 2005), pp. 3-11

“Was Leo Strauss Wrong About John Locke?” with Comments by Michael Zuckert and a Response, *Review of Politics*, vol. 66, no. 4 (Fall 2004), pp. 553-573

“Catholic Politics and Religious Liberty in America: The Carrolls of Maryland,” in Daniel L. Dreisbach, Mark D. Hall, and Jeffrey H. Morrison, eds., *The Founders on God and Government* (Lanham, MD: Rowman & Littlefield Publishers, 2004), pp. 251-271

“The New Constitutionalism of Publius,” in Bryan-Paul Frost & Jeffrey Sikkenga, eds., *History of American Political Thought* (Lanham, MD: Lexington Books, 2003), pp. 230-247

“Is Tradition Activist? The Common Law of the Family in the Liberal Constitutionalist World,” *University of Colorado Law Review*, vol. 73, No. 4 (Fall 2002), pp. 1291-1306

“Federalism, the States, and the Electoral College,” in Gary L. Gregg II, ed., *Securing Democracy: Why We Have and Electoral College* (Wilmington, DE: ISI Books, 2001), pp. 43-54

“Constitutionalism and Civil Disobedience,” in *Findings: The Wilberforce Forum’s Review of Contemporary Culture*, Fall 2001, pp. 33-41

“The Common Law Spirit of the American Revolution,” in Mark Blitz & William Kristol, eds., *Educating the Prince: Essays in Honor of Harvey Mansfield* (Lanham, MD: Rowman & Littlefield Publishers, 2000), pp. 192-204

“Christianity, the Common Law, and the Constitution,” in Gary L. Gregg II, ed., *Vital Remnants: America’s Founding and the Western Tradition* (Wilmington, DE: ISI Books, 1999), pp. 175-209

“Property, the Common Law, and John Locke,” in David F. Forte, ed., *Natural Law and Contemporary Public Policy* (Washington: Georgetown University Press, 1998), pp. 193-218

“Heir Apparent: Bushrod Washington and Federal Justice in the Early Republic,” in Scott D. Gerber, ed., *Seriatim: The Supreme Court Before John Marshall* (New York: New York University Press, 1998), pp. 322-349

“The Idiom of Common Law in the Formation of the Judicial Power,” in Bradford P. Wilson and Ken Masugi, eds., *The Supreme Court and American Constitutionalism* (Lanham, MD: Rowman & Littlefield Publishers, 1997), pp. 47-68; also *Common-Law Liberty*, ch. 1

“Sound Whigs or Honeyed Tories? Jefferson and the Common Law Tradition,” in Gary L. McDowell and Sharon L. Noble, eds., *Reason and Republicanism: Thomas Jefferson’s Legacy of Liberty* (Lanham, MD: Rowman & Littlefield Publishers, 1997), pp. 103-117

“Religious Liberty and Common Law: Free Exercise Exemptions and American Courts,” in *Polity*, vol. 26, no. 1 (Fall 1993), pp. 1-24; also *Common-Law Liberty*, ch. 3

“Common Law and Constitutionalism in the Abortion Case,” in *The Review of Politics*, vol. 55, no. 3 (Summer, 1993), pp. 421-441; also *Common-Law Liberty*, ch. 4

“Common Law and Natural Law,” in *Benchmark*, vol. 5, no. 2 (Winter 1993) [Symposium on Natural Law and the Constitution]

“Neo-Constitutionalism? Rawls, Dworkin, and Nozick,” with Clifford Orwin, in Allan Bloom, ed., *Confronting the Constitution* (Washington: The AEI Press, 1990), pp. 437-470

“Constitutionalism and Judging in *The Federalist*,” in Charles Kesler, ed., *Saving the Revolution: The Federalist Papers and the American Founding* (New York: The Free Press, 1987), pp. 203-218; also appears as chapter 12 in *Common Law and Liberal Theory*

ENCYCLOPEDIA ARTICLES

“The Declaration of Independence,” on the website, “Natural Law, Natural Rights, and American Constitutionalism,” The Witherspoon Institute (July 2011) < <http://www.nlnrac.org/american/declaration-of-independence> >

“Common Law and the Law of Reason,” on the website, “Natural Law, Natural Rights, and American Constitutionalism,” The Witherspoon Institute (July 2011) <<http://www.nlnrac.org/earlymodern/common-law>>

“States’ Rights,” in Kermit L. Hall, ed., *The Oxford Companion to American Law* (New York: Oxford University Press, 2002), pp. 766-767

“Revolution, American,” and “Washington, George,” in Seymour Martin Lipset, ed., *The Encyclopedia of Democracy* (Washington, D.C.: Congressional Quarterly Press, 1996), vol. III, pp. 1065-68; vol. IV, pp. 1366-67

“Leo Strauss,” and “Carl Friedrich,” in *American Political Scientists: A Dictionary*, ed. Glenn H. Utter and Charles Lockhart (Westport, CT: Greenwood Press, 1993), pp. 293-296, 92-95

OTHER ARTICLES (SINCE 2015)

[“Despite Deep Diversity,” *Law & Liberty* Forum, August 9, 2023 \(responding to Yuval Levin, “Constituting Unity”\)](#)

[“Can the Legislative Power be Delegated to the Administrative State?,” *Constitutional Conversations*, May 17, 2023](#)

[“What’s Un-American about Accommodation?,” with Paul O. Carrese, *Law & Liberty*, May 8, 2023](#)

[“As Manly a Man as a Professor Can Be,” *Law & Liberty*, December 9, 2022](#)

[“Hannah Arendt’s Vision of Freedom,” *Public Discourse*, November 14, 2022](#)

[“A Constitution for the Common Good?,” *Law & Liberty* Forum, August 1, 2022;](#)
[“Wanted: A Constitutional Ethos,” *Law & Liberty* Forum, August 31, 2022](#)

[“A Bipartisan Effort to Bolster Civics Curricula,” with Jacqueline Pfeffer Merrill, *Washington Examiner*, June 14, 2022](#)

[“Vaccination, the Law, and the Common Good,” *Law & Liberty*, August 26, 2021](#)

“Debating the Educating for American Democracy Roadmap,” with Mark Bauerlein and Paul O. Carrese, *RealClear Education*, July 23, 2021

“Conservatives Should Give the New Civics Roadmap a Fair Chance,” with Paul O. Carrese, *American Greatness*, June 27, 2021

[“What’s So Un-American about a Shared American Civics?” with Paul O. Carrese, *National Review* \[online\], June 9, 2021; Carrese & Stoner rejoinder to Stanley Kurtz’s reply, “Step Up to Restore a Sound American Civics,” June 15, 2021](#)

[“Can Liberal Constitutionalism Instruct?” “Liberty Matters” Symposium on Walter Bagehot’s *English Constitution*, *Online Library of Law and Liberty*, January 15 & June 3, 2020](#)

[“Common-Law Originalism,” the Walter Berns Constitution Day Lecture at the American Enterprise Institute, September 17, 2019](#)

[“Soft Landing,” in “Michael Anton’s *After the Flight 93 Election: A Law & Liberty Symposium*, \[*Online Library of*\] *Law and Liberty*, July 9, 2019](#)

[“Cake, Controversy—and the Common Law,” \[*Online Library of*\] *Law & Liberty*, June 13, 2018](#)

[“Academic Freedom and Freedom of Speech,” *Open Inquiry Project \(Institute for Humane Studies\)*, May 31, 2018](#)

[“Free Speech, Diversity, and Inclusion: Is there a Balance?” Jack Miller Center’s “Constitution Day Conversation,” published October 26, 2017](#)

[“Unsettling Thoughts on Liquidation,” *Online Library of Law & Liberty*, September 15, 2017](#)

[“Universities Should be Safe Spaces—for Intellectual Diversity” \(with Christopher d’Elia, Richard Eldridge, Peter Minowitz, Suzanna Sherry, and Paul Carrese\), *RealClear Politics*, June 1, 2017](#)

[“Peter Augustine Lawler, a personal remembrance,” *Online Library of Law & Liberty*, May 24, 2017](#)

[“The Harmony and Balance of Virtue and Liberty,” *Learn Liberty Website*, April 24, 2017](#)

[“The Chicago Generation?” *Open Inquiry Project \(Institute for Humane Studies\)*, March 6, 2017](#)

[“Electors, Americans, Countrymen, Lend Me Your Ears,” *Online Library of Law & Liberty*, December 2, 2016](#)

[“Legal Realism, Legal Revolution,” response to Marc DeGirolami, “The Unforgettable Fire: Tradition and the Shape of the Law,” *Online Library of Law & Liberty*, August 19, 2016](#)

"Who Should Replace Scalia? No one. Here's why Eight is Enough," with Ronald Keith Gaddie, Monkey Cage Blog, *Washington Post*, February 19, 2016

"Stoner vs. Munger: Citizen or Consumer? How Do You Choose When You Vote?," *Online Library of Law & Liberty*, January 27, 2016

"Is the Civil War Long Gone and Far Away?," *The Imaginative Conservative* [website], July 6, 2015

RECENT BOOK REVIEWS

of Graham James McAleer & Alexander S. Rosenthal-Pubul, *The Wisdom of Our Ancestors: Conservative Humanism and the Western Tradition* [["Searching for a Conservative Camino"](#)], *Law & Liberty*, August 8, 2024

of Timothy Burns, *Leo Strauss on Democracy, Technology, and Liberal Education*, ["Interpretation and Change," one of four reviews in a symposium titled "Diagnosing Modern Ills, Offering Possible Correctives"], *Perspectives on Political Science*, vol. 52, no. 1 (2023), pp. 15-16

of Mark Blitz, *Reason and Politics: The Nature of Political Phenomena* [["The Whole Way of Life"](#)] in *Claremont Review of Books*, vol. 22, no. 1 (Winter 2021-22), pp. 91-93

of James Patterson, *Religion in the Public Square: Sheen, King, Falwell* [["Catholic, Protestant, Partisan"](#)], *Online Library of Law & Liberty*, February 3, 2021

of Keith Whittington, *Speak Freely: Why Universities Must Defend Free Speech* [["A Defense of the Neo-Liberal University"](#)], *Online Library of Law & Liberty*, September 3, 2018

of Floyd Abrams, *The Soul of the First Amendment*; Timothy Garton Ash, *Free Speech: Ten Principles for a Connected World*; Erwin Chemerinsky and Howard Gillman, *Free Speech on Campus*; and Sigal R. Ben-Porath, *Free Speech on Campus* [["The Free Speech Debate"](#)], in *Claremont Review of Books*, vol. 18, no. 1 (Winter 2018), pp. 36-39

of Thomas G. West, *The Political Theory of the American Founding: Natural Rights, Public Policy, and the Moral Conditions of Freedom* [["A Partial Vindication of Thomas West"](#)], *Liberty Law Book Reviews/Online Library of Law & Liberty*, December 11, 2017

of Francis Beckwith, *Taking Rites Seriously: Law, Politics, and the Reasonableness of Faith* ["Review Essay: Can American Courts Respect Religious Reasoning"], in *Harvard Theological Review*, vol. 110, no. 3 (July 2017), pp. 464-469

of Melissa Moschella, *To Whom Do Children Belong? Parental Rights, Civic Education, and Children's Autonomy* [["Teach Your Children Well"](#)], in *Claremont Review of Books*, vol. 17, no. 2 (Spring 2017), pp. 91-92

of David Carpenter, *Magna Carta*; Nicholas Vincent, *Magna Carta: A Very Short Introduction*; Nicholas Vincent, ed., *Magna Carta: The Foundation of Freedom, 1215-2015*; Randy J. Holland, ed., *Magna Carta: Muse and Mentor*; and David Barstow Magraw, Andrea Martinez, and Roy E. Brownell II, eds., *Magna Carta and the Rule of Law* [["Magna Carta and Us"](#)], in *Claremont Review of Books*, vol. 15, no. 4 (Fall 2015), pp. 52-55

CURRENT RESEARCH PROJECTS

"The Legislative Power" – a series of papers designed to form a book on the origin of the modern legislative power, in political theory and in parliamentary practice, and the causes of its recent eclipse by judicial intervention on the one hand and administrative action on the other.

"The Aristotle Update" – a series of conferences and papers assessing the standing of Aristotelian thought and influence in the modern university

UNIVERSITY SERVICE

- Director, Eric Voegelin Institute for American Renaissance Studies (July 2015-)
- Acting Dean, Honors College, Louisiana State University (July-December 2010)
- Department Service (Political Science):
 - Chair (2007-2013)
 - Chair, Evaluation Committee (2007); member (2014, 2021, 2023)
 - Chair, Research Committee (2001-02)
 - Chair, Graduate Committee [Director of Graduate Studies] (1996-2000); member (2014-19)
 - Chair, Ad hoc Committee on the Curriculum (Fall 2014)
 - Served on various department recruitment committees
- Member, Council on Research, 2020-
- Member, Academic Process Improvement Committee, 2021-
- Member, Search Committee for Dean of the Manship School of Mass Communication, 2022-23
- Member, Ad Hoc Committee on Building Names, 2020-21
- Member, organizing committee for the Center for Collaborative Knowledge, 2017-
- Member, LSU Faculty Senate, 1994-95, 1996-97, 2006-09
- Member, LSU Faculty Senate Executive Committee, 2006-08; secretary, 2007-08
- Member, LSU Faculty Senate Committee on General Education, 2004-07
- Faculty Advisor to undergraduate Pre-law Society c.1991-95, 2003-
- Member, Academic Technology Advisory Committee (formerly Moodle Development Advisory Committee), 2008-20

SELECTED PROFESSIONAL SERVICE

- Member, American Political Science Association Committee on Civic Education, 2023-25
- Member, Political Science and Civics Task Force, NEH-sponsored Convening on “Educating for American Democracy: A Roadmap for Excellence in History and Civics Education for All Learners,” November 2019 – April 2020
- Member, Louisiana State Advisory Committee to the United States Commission on Civil Rights, 2010-12, 2013-15
- Member, National Council on the Humanities (supervisory board for the National Endowment for the Humanities), 2002-06
- Member, Executive Board of the Law and Courts Section of the American Political Science Association, 2009-2011 (elected 2008); member, Committee on the Law and Courts Section Lifetime Achievement Award, 2007-08

SELECTED FELLOWSHIPS, GRANTS, AND AWARDS

- Grants from the Charles G. Koch Foundation to the Eric Voegelin Institute to sponsor lectures and reading groups (\$40,000 in AY 2023-24), (\$38,500 in AY 2022-23), (\$22,175 in AY 2021-22), (\$22,175 in AY 2020-21), (\$25,000 in AY 2019-20), (\$32,500 in AY 2018-19), (\$104,300 in AY 2017-18), (\$99,500 in AY 2016-17), (\$12,000 in AY 2015-16)
- Grants from the Apgar Foundation to the Eric Voegelin Institute for curricular enhancement (\$100,000/year for AY 2022-26), (\$25,000 in AY 2021-22), (\$10,000 in AY 2020-21), (\$20,000 in AY 2019-20)
- George W. Carey Faculty Recognition Award, Intercollegiate Studies Institute, Washington, DC, October 25, 2018
- Senior Fellow, The Austin Institute, Austin, Texas, 2016-
- Grants from the Jack Miller Center for Teaching America’s Founding Principles and History to sponsor a Constitution Day Lecture (\$2500 in Sept. 2023), (\$3000 in Sept. 2022), (\$2000 in Sept. 2021) (\$2000 in Sept. 2020), (\$1000 in Sept. 2015)
- Garwood Visiting Fellow, James Madison Program in American Ideals and Institutions, Department of Politics, Princeton University, 2013-14
- Sternberg Professor for 2010-11, LSU Honors College
- Senior Fellow, The Witherspoon Institute, Princeton, New Jersey, 2009-
- Chairman’s Award, Jack Miller Center for Teaching America’s Founding Principles and History, Washington, DC, April 24, 2009

RECENT PROFESSIONAL PAPERS

“Who Is Aristotle’s Legislator, and What Does He Know?” at the annual meeting of the New England Political Science Association, Newport, Rhode Island, April 20, 2024

“John Marshall’s View of the Legislative Power,” at a conference on John Marshall, Boston College, Boston, Massachusetts, March 14, 2024

“Deliberation, Negotiation, and the Common Good: What Law Does a Representative Legislature Make?,” on a panel sponsored by the Eric Voegelin Society, at the annual meeting of the American Political Science Association, Los Angeles, California, September 1, 2023

“Custom, Constitution, and Civil Society,” at a conference on “Origins and Sources of Modern Constitutionalism in Europe: Law and Ideas,” University of Economics and Human Sciences, Warsaw, Poland, May 11, 2023

“How Rational Does Law Have to Be?,” at the annual meeting of the New England Political Science Association, Mystic, Connecticut, April 22, 2023

“Does the Legislative Power Survive Carl Schmitt’s Critique of Parliamentarism?” at the annual meeting of the New England Political Science Association, Bretton Woods, New Hampshire, April 30, 2022

“Was the Constitution Meant to be Democratic?” 2022 Constitutional Law Symposium: The Constitution and Democratic Erosion,” Drake University Constitutional Law Center, via Zoom, April 9, 2022

“Are There 100 Acts of Congress Everyone Should Know?” with Hunter Holliday, iPoster, at annual meeting of the American Political Science Association, Seattle, Washington (virtual session), October 1, 2021

“Was Parliament the Legislative Power before Locke?,” at the annual meeting of the New England Political Science Association, via Zoom, April 23, 2021

“Montesquieu and Rousseau on the Legislator and the Legislative power,” at the annual meeting of the Midwest Political Science Association, via Zoom, April 17, 2021

“The Modern Science of Legislation: From Bentham to Rawls and Hayek,” at the annual meeting of the Southern Political Science Association, via Zoom, January 8, 2021

“John Locke and the Conceptualization of Legislative Power,” on a panel sponsored by the Eric Voegelin Society, at the annual meeting of the American Political Science Association, via Zoom, September 11, 2020

“The Political Development of Legislative Power: The Nineteenth-Century Codification Movement and the Battle over Common Law,” workshop sponsored by the journal *American Political Thought* and the Salvatori Center for the Study of Individual Freedom in the Modern World, Claremont McKenna College (via Zoom), July 11, 2020

RECENT LECTURES, DEBATES, AND WEBINARS

“Who Gets to Make Law? The Legislative Power at the Founding and Today,” Constitution Day Lecture, Middlebury College, Middlebury, VT, September 14, 2023; repeated with the subtitle “Natural Law, Common Law, and the Legislative Power” as the Fortin & Gonthier Lecture, Assumption University, Worcester, MA, October 5, 2023; repeated with the subtitle “The Legislative Power Today” at the Tocqueville Forum, University of Houston, Houston, TX, October 20, 2023

Debate: “[Can the Legislative Power be Delegated to the Administrative State?](#),” with Michael Rappaport, sponsored by the Federalist Society and the Center for Constitutional Design, Sandra Day O’Connor College of Law, Arizona State University, Phoenix, Arizona, March 23, 2023

“The Missing Opinion in *Dobbs*,” SCETL Student Assembly, Arizona State University, Tempe, Arizona, March 20, 2023

[“Catholicism and Constitutionalism: An American Perspective,” Center for Citizenship & Constitutional Government, University of Notre Dame, February 16, 2023](#)

“How Eric Voegelin Read Plato: A Primer for Straussians,” Hugh McCloskey Evans Memorial Lecture, Tulane University, New Orleans, Louisiana, November 19, 2022

“Does Liberalism Have Anything to Teach Us about Happiness?” Salem Center for Policy, McCombs School of Business, University of Texas, Austin, Texas, February 28, 2022

“Can Religion Be Legislated?,” Tocqueville Forum on Liberal Democracy, Christendom College, Front Royal, Virginia, November 15, 2021; and under the title, “Can Government Legislate Religion?,” Constitution Day Lecture, Samford University, Birmingham, Alabama, October 18, 2021

Webinar Discussant: “A Conversation with Jonathan Rauch on ‘The Constitution of Knowledge,’” Rhodes College Department of Philosophy, September 13, 2021 [[remarks begin at 31:35](#)]

“1787: The Constitutional Convention and Political Participation in the Early Republic,” webinar with Eric Nelson (Harvard), Jack Rakove (Stanford), and Barry Shain (Colgate), sponsored by the National Association of Scholars, April 29, 2021 [recording available here: <https://www.youtube.com/watch?v=txKuqzByX7U>]

“Has Congress Lost the Legislative Power?”, Constitution Day Lecture, Boston College, via Zoom, October 6, 2020

OTHER RECENT PROFESSIONAL ACTIVITIES

Faculty, Hudson Institute Political Studies Summer Fellowship (week two: The American Founding), Washington, DC, June 24-26, 2024

Presenter, “The Original Understanding of the Common Law,” Fourth Annual Originalism for Judges Seminar, Georgetown Center for the Constitution, Sarasota, Florida, May 30, 2024

Presenter, “Civic Thought and Political Science,” Meeting of the Deans and Directors of the Schools of Civic Thought and Related Institutions, American Enterprise Institute, Washington, DC, May 15, 2024

Chair and participant, “Author-Meets-Readers: *Mere Natural Law: Originalism and the Anchoring Truths of the Constitution*, by Hadley Arkes,” at the annual meeting of the New England Political Science Association, Newport, Rhode Island, April 20, 2024

Presenter, Seminar on “When Robert Oppenheimer Met Eric Voegelin: On Science, Communism, and the End of the World,” Department of Political Science, University of Houston, October 10, 2023; repeated for the Political Theory Colloquy, Eric Voegelin Institute, Louisiana State University, January 24, 2024

Podcast: [Free Speech and Censorship #2: James Stoner on Willmoore Kendall's “The ‘Open Society’ and its Fallacies,” *Enduring Interest Podcast* with Flagg Taylor](#), released October 11, 2023

Faculty, course on “The American Founding” (AHG 502), Master of American History and Government Program, Ashland University, July 16-21, 2023 (also on-line, July 6-16, 2020, and July 1-11, 2019)

Discussion Leader, Colloquium on “Freedom of the Press,” sponsored by Liberty Fund, Tucson, Arizona, April 13-16, 2023

Participant, Ashbrook Center/Liberty Fund Faculty Seminar, “The New History of Capitalism and its Critics,” San Diego, California, February 2-5, 2023

Participant, roundtable on “Voices of the Right: Political Conservatism in Academia,” at the annual meeting of the American Political Science Association, Montreal, Quebec, Canada, September 16, 2022 (via Zoom)

Discussant, panel on “Citizenship, Republicanism, and Slavery’s Northern Reach,” at the annual meeting of the Society for Historians of the Early American Republic (SHEAR), New Orleans, Louisiana, July 24, 2022

Participant, “Roundtable: Author Meets Critics: *Leo Strauss on Democracy, Technology, and Liberal Education*, by Timothy Burns,” at the annual meeting of the New England Political Science Association, Bretton Woods, New Hampshire, April 29, 2022

Discussant and chair, panel (untitled) at the Eric Voegelin Society Mini-Conference, via Zoom, January 3, 2022

Participant, Liberty Fund Colloquium, “Executive Power, Liberty, and Constitutionalism in the Writings of Jacques Necker and Germaine de Staël,” Miami Beach, Florida, October 21-24, 2021

Participant, “Roundtable: Constitutional Stress Tests in an Age of Populism,” sponsored by the Eric Voegelin Society, at the annual meeting of the American Political Science Association, Seattle, Washington (virtual session), September 30, 2021

Faculty, course on “Religious Liberty” (AHG 660), Master of American History and Government Program, Ashland University, on-line, July 19-29, 2021

Participant, Consultation on Property and Private Law, sponsored by Faulkner University’s Jones School of Law and the Acton Institute, Gulf Shores, Alabama, May 12-14, 2021

Discussant and chair, panel on “Rhetoric and Deliberative Democracy,” at the annual meeting of the New England Political Science Association, via Zoom, April 24, 2021

Chair and organizer, roundtable on Keith Whittington, *Repugnant Laws: Judicial Review of Acts of Congress from the Founding to the Present*, at the annual meeting of the New England Political Science Association, via Zoom, April 24, 2021

Discussant and chair, panel on “Problems in Aristotle’s Politics,” sponsored by the Society for Greek Political Thought, at the annual meeting of the Midwest Political Science Association, via Zoom, April 17, 2021

Discussion Leader, Colloquium on “Freedom of Assembly and Religious Liberty,” sponsored by the Federalist Society and Liberty Fund, via Zoom, March 12-13, 2021

Discussant, panel on “The Early-Modern Argument for Commerce,” at the annual meeting of the Southern Political Science Association, via Zoom, January 9, 2021

Faculty, with presentation titled “Forming Community by Embracing a Legacy: Common Law and Legislation in the American Constitutional Tradition,” Intercollegiate Studies Institute National Honors Conference, “American Conservatism and the Quest for Community,” Pittsburgh, Pennsylvania, September 24-27, 2020

Appendix 6: Charter Board By-Laws

**AMENDED BYLAWS OF
GREAT HEARTS LOUISIANA, INC.**

**ARTICLE I
CORPORATE AUTHORITY**

The name of this school will be GREAT HEARTS LOUISIANA, INCORPORATED, a Louisiana nonprofit Corporation (the “Corporation”). The Corporation is a duly organized corporation authorized to do business in the State of Louisiana by the filing of Articles of Incorporation on the 2nd day of April 2021.

The Corporation is organized under Title 12, Corporations and Associations, of the Louisiana Revised Statutes and except as otherwise provided herein, the Statutes shall apply to the governance of the Corporation.

**ARTICLE II
PURPOSE**

The Corporation is a tuition-free charter public school in Baton Rouge, Louisiana that will enable students to: (1) acquire critical reasoning and communication skills; and (2) explore the cultural and scientific achievements at the heart of the liberal arts and sciences. The Corporation will promote a curriculum emphasizing personal integrity, creative imagination, community service, and a lifelong quest for learning. The Corporation will not deny admission based on ethnicity, national origin, gender, income level, disability, religion, academic ability, artistic ability, athletic ability, or the public school district that the child would otherwise attend under Louisiana law, or any other factors prohibited by law.

**ARTICLE III
MEMBER**

3.1 Designation of Sole Member. The Corporation shall have a successor Sole Member, Great Hearts America, an Arizona nonprofit corporation (the "Member"). The Member may, by written notice given to the Secretary or any Director of the Corporation, designate a single successor member who shall succeed it as the sole member of the Corporation. Such successor member may also designate a single successor member of succeed such successor member as the sole member of the Corporation, and so forth. The Member and any of its successors shall herein be referred to as the “Sole Member” and will have all the authority set forth in the Corporation's Articles of Incorporation (the "Articles of Incorporation") and these Bylaws. The Articles of Incorporation and these Bylaws may not be changed without the Sole Member’s written consent, in its sole discretion.

3.2 Rights of the Sole Member. Subject to applicable laws and except as otherwise set forth in these Bylaws, the Sole Member shall have all statutory rights as a “member” of the Corporation as defined in Louisiana Revised Statute (“LRS”) 12:201, as amended, including, but not limited to, the rights: (1) to approve the dissolution and liquidation of the Corporation; (2) to approve any plan of merger for the Corporation or any amendment to such plan; (3) to approve the sale,

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lease, exchange, or other disposition of all, or substantially all, of the Corporation’s assets; (4) to inspect and copy any corporate records (including by an agent or attorney); (5) to approve any amendment to the Articles of Incorporation or to these Bylaws; and (6) to, at any time, remove

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any or all of the directors of this Corporation, with or without cause, and then fill the vacancy or vacancies left by such removal. Except as otherwise permitted under the Corporation's Articles of Incorporation for a charitable Sole Member and applicable law, no right, title or interest in any property or earnings of the Corporation shall inure to any member during the existence of the Corporation or upon its dissolution.

3.3 Termination of Sole Member. If, at any time the legal existence of the Sole Member ceases or the Sole Member otherwise ceases to serve as a member, and if no successor Sole Member has been designated or if any such designee is unable or unwilling to serve as a member, then the membership of the Corporation shall consist of its Board of Directors as such Board is then and may thereafter from time to time be constituted. If the Directors become the members of the Corporation, the Corporation may continue in existence or may be dissolved as set forth in the Corporation's Articles of Incorporation. If the Corporation continues in existence with the Board of Directors as its members, then the Board shall cause conforming and appropriate amendments to be made to the Corporation's Articles of Incorporation and these Bylaws. Except as described above, the Board of Directors may not terminate or eliminate the Sole Member without the Sole Member's written consent and approval.

3.4 Action by Sole Member. For so long as the Member or a successor Sole Member designated pursuant to Section 3.1 serves as the Sole Member of the Corporation, there shall be no meetings required of members except as required by law, and the Sole Member may take any and all action without a meeting by a written consent signed by the Sole Member setting forth the action so taken.

ARTICLE IV BOARD OF DIRECTORS

Section 1. **Powers.** The Board of Directors of the Corporation, ("Board") shall have the powers and duties conferred upon them by these Bylaws and may exercise all such powers of the Corporation and do all such lawful acts and things as are not prohibited by law or by the Articles of Incorporation or by these Bylaws.

Section 2. **Number and Election Term.** There will be not less than three (3) initial Directors. The number of Directors shall be increased to at least seven (7) Directors during the time the Corporation is a party to a contract to operate public charter schools in Louisiana. Each Director will serve for a one (1) year term and until his or her successor is appointed, but not more than a five (5) year term. A Director whose term has expired may be appointed to succeed him or herself.

Section 3. **Additional Directors and Vacancies.** The Board will appoint such additional Directors or replacement Directors as it deems necessary, subject to the Sole Member's approval. Pursuant to La R.S. 12: 224(B), a person appointed as a Board member to fill an unexpired term on the Board of less than one (1) year will hold office until the next annual meeting of the Board or until

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his or her successor is appointed or chosen.

Section 3A. **Appointment and Removal of Board Members.** All Directors must be annually appointed or reappointed according to the provisions of section 3 above. Directors may be removed as set forth in Section 4 below.

Section 4. **Removal and Resignation.** Any of the Directors may be removed with or without

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cause by the Board, subject to the Sole Member's approval. A Director who is removed in accordance with this section will also be deprived of his or her status as an officer of the Corporation. Any Director who is absent from more than three (3) consecutive meetings of a Board meeting in any fiscal year may be removed automatically, unless the Board acts affirmatively to retain the Director or to excuse the absence. A Director may resign at any time by written notification to the Corporation at its principal office, or to the Corporation's statutory registered agent. Unless otherwise specified in the notice, the notice will be effective upon receipt by the Corporation or registered agent.

Section 5. Compensation. Directors will serve without compensation for their services as Directors, although they may be reimbursed for all necessary and reasonable expenses of attending meetings and otherwise performing their duties.

Section 6. Quorum. A quorum will consist of a majority of the Board members then in office. Unless otherwise specified in these Bylaws or the Articles of Incorporation, every act or decision made by a majority of the Directors present at a duly held meeting at which a quorum is present will be regarded as the act of the Board. Each Director will have one (1) vote.

Section 7. Annual Meeting. The annual meeting of the Board of Directors will be held in June of each calendar year or such other month as will be determined by the Board. At the annual meeting, the incumbent Directors will transact such business as may be properly brought before the meeting. If for any reason an annual meeting is not held on the day set forth above, a deferred annual meeting will be thereafter called and held in lieu thereof, at which the same proceedings may be conducted.

Section 8. Regular Meetings. Regular meetings of the Board will be held at least once a quarter each calendar year, on the campus of Corporation, or such other time or place as the Board by resolution may determine.

Section 8.1. Conference Call. One or more shareholders may participate in a meeting of shareholders by means of conference telephone, video conferencing, or similar communications equipment by means of which all persons participating in the meeting can hear each other. Participation in this manner shall constitute presence in person at such meeting.

Section 9. Special Meetings. Special meetings of the Board may be held at any time or place upon the call of the President or the Vice President or at the written request of three (3) Directors or the Member.

Section 10. Notice of Meetings to Directors. Not less than seventy-two (72) hours nor more than

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thirty (30) days (inclusive of the date of meeting) before the date of any meeting of the Board, the Secretary of the Corporation, or any other officer of the Corporation, will cause a written or electronic notice setting forth the time, place, and general purposes of the meeting to be delivered personally, to be sent by facsimile, or by e-mail, or to be deposited in the mail, with first class or airmail postage prepaid, addressed to each Director of record at his or her last address (including e-mail) or facsimile number as it appears in the Corporation's records. Notice that is mailed to a Director must be deposited in the mail no less than three (3) days (exclusive of the date of the meeting) before the date of the meeting. Such notice will also be given to the Member in the same manner as notice to the Directors.

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Section 11. Public Notice of Meetings. Public notice of all meetings of the Board, of the Executive Committee, of the Member (when transacting business concerning the Corporation) and of all committees authorized by the Board (collectively, the "Applicable Meetings" and singly an "Applicable Meeting") will be given pursuant to and as required by the Louisiana Open Meetings Law – La R.S. 42:11, (referred to as the "Open Meetings Law"), for so long as the Open Meetings Law applies to charter schools. Notice of all the Applicable Meetings, except as otherwise provided by state law, regulation, the Articles on Incorporation, or these Bylaws, will be posted as described below at least 24 hours before the time of the meeting, pursuant to La R.S. 42:19(A)(1)(b)(i).

- a. Posting of Notice: Notice to the public of any Applicable Meeting will be posted at the Corporation's administrative offices in a location convenient to the public at least 24 hours before the time of such meeting.
- b. Emergency Notice: Emergency meetings as may be allowed under the Louisiana Open Meetings Law shall be posted up to 24 hours before the meeting.
- c. Internet Posting: Notice and the agenda of all meetings of the Board of Directors will also be posted on the Corporation's internet website, if any, concurrently with the notice posted at the Corporation's administrative offices, or as otherwise required and authorized by the Louisiana Open Meetings Law.
- d. Agenda: At each regular meeting of the Board, the Board will establish the order of business in an Agenda approved by the President and as presented in the notice of the meeting. However, the President may modify the order of business. The agenda will identify all matters to be presented to and considered by the Board. Matters not disclosed in the agenda and the meeting notice available to the public will not be deliberated or be considered by the Board, except as permitted by the Louisiana Open Meetings Law, if any.

Section 12. Open Meetings Law. The Corporation and the Board will comply in all respects with the Louisiana Open Meetings Law.

Section 13. Governing Rules. The Directors may adopt, from time to time, rules to govern the conduct of their meetings. The rules will be binding, unless and until changed by a majority vote.

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Section 14. Minutes. A written record of the discussions and decisions reached at each meeting of the Board in the form of minutes will be made, and will, upon approval by the Board at a legally convened public meeting, be made a part of the records of the Corporation. The minutes will comply with the requirements set forth in the Open Meetings Law, and other applicable Louisiana law.

ARTICLE V OFFICERS

Section 1. Designation of Titles. The officers of the Corporation will be a President, a Vice President, and a Secretary and other officers, including Assistant Secretary, as from time to time, may be determined by the Board. The election of any officer of the Corporation will not of itself create contract rights in the office.

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Section 2. Election and Term. The officers will be elected by the Board at the annual meeting of the Board of Directors, and each office will serve for a one (1) year term and until his or her successor is elected. Any officer may be elected to succeed him or herself.

Section 3. Removal of Officers. Any officer elected by the Board may be removed, with or without cause, at any time by the affirmative vote of two-thirds (2/3) of the voting Directors then in office. The officer in question will not vote on the question of removal but may be present at the meeting and may be counted in determining the presence of a quorum.

Section 4. Vacancies. Any vacancy occurring in any office of the Corporation may be filled for the unexpired duration of the term by the Board.

Section 5. President. The President, subject to the direction of the Board, will have general charge of the business affairs and property of the Corporation and general supervision of its officers and agents. In general, he or she will perform all duties incident to the office of President, will see that all orders and resolutions of the Board and the Member are carried into effect, and will preside at meetings of the Board.

Section 6. Vice President. The Vice President, subject to the direction of the Board, will act for the President in his or her absence or incapacity and will have other duties as may be assigned to him or her by the Board.

Section 7. Secretary. The Secretary will attend all meetings of the Board and record all votes and proceedings of the Board in a book to be kept for that purpose and will perform like duties for all committees of the Board, as necessary. He or she will give, or cause to be given, notice of the meetings to Directors and the Member and will perform such other duties as may, from time to time, be prescribed by the Board or the President, under whose supervision he or she will act. He or she will have custody of the seal of the Corporation, and authority to affix the same to any instrument requiring it, and, when affixed, the seal may be attested by his or her signature. The Board may give general authority to any officer to affix the seal of the Corporation and to attest the affixing thereof by his or her signature.

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Section 8. Other Officers. The President will recommend to the Board for its approval such additional officers as may be necessary to the business of the Corporation, who will perform such duties and responsibilities as may be prescribed by the President.

ARTICLE VI COMMITTEES

Section 1. Standing Committees. The Board may, in its discretion, authorize such standing committees and advisory boards as it deems appropriate. Membership on standing committees and advisory boards will be determined by the Board. The principal matters relating to that committee's or advisory board's areas of responsibility are for the purpose of making recommendations to the Board. Another purpose is to advise and make recommendations to the Board on any matters pertaining to the policy of the Corporation that may be requested from the Board. The chairperson of each standing committee or advisory board will be determined by the Board. It will be the responsibility of the chairmen of standing committees and advisory boards to notify members of meetings. However, no quorum will be required in order for a standing committee or advisory board to meet or to act. Chairpersons of standing committees and advisory boards will decide whether or not minutes of a committee or advisory board meeting

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are to be recorded. The President will be an ex-officio member of all standing committees and advisory boards, except committees or advisory boards where he or she is specifically designated as a voting member by the Board.

Section 2. Special Ad Hoc Committees. Special Ad Hoc committees may be appointed and discharged by the Board for special tasks as circumstances warrant. A special ad hoc committee will be limited to the accomplishment of the task for which it was created and will have no power to act except as specifically conferred by the Board. Upon the completion of the task for which appointed, the special ad hoc committee will be discharged.

Section 3. Extent of Authority. No committee may exercise the authority of the Board, Sole Member, in filling vacancies on any committee of the Board.

ARTICLE VII SOLICITATION, ACCEPTANCE, AND INVESTMENT OF FUNDS

Section 1. Solicitation and Borrowing of Funds. The Corporation may solicit contributions or borrow funds from any persons or Corporations as the Directors deem appropriate, upon terms and conditions consistent with the provisions of the Articles of Incorporation and subject to the provisions of Sections 2 and 3 below.

Section 2. Acceptance of Funds. The Corporation may, upon prior, written approval from the Member (which approval will not be unreasonably withheld, conditioned or delayed), accept contributions, grants, and gifts from any persons, partnerships, Corporations, government entities, or other entities upon such terms and conditions consistent with the provisions of the Articles of Incorporation and these Bylaws.

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Section 3. Borrowing Funds. The Corporation may, upon the prior written approval from the Member (which approval will not be unreasonably withheld, conditioned or delayed), borrow funds for capital improvement, operations or other uses which the Board deems reasonably necessary and consistent with the provisions of the Articles of Incorporation and these Bylaws.

Section 4. Investment of Funds. The board will direct all investments of the Corporation's funds subject to the Member's periodic review and in accordance with applicable Louisiana law.

ARTICLE VIII INDEMNIFICATION OF DIRECTORS, OFFICERS, EMPLOYEES, AND AGENTS

Section 1. Non-Liability for Debts. The private property of the Directors and Officers will be exempt from execution or the liability of any debts of the Corporation, and no Director or Officer will be liable or responsible for any debts or liabilities of the Corporation.

Section 2. Indemnification. Each Director, Officer, employee, and agent of the Corporation will be indemnified by the Corporation to the fullest extent permitted by law, as provided in the Articles of Incorporation.

ARTICLE IX

FISCAL YEAR

The fiscal year of the Corporation will commence on July 1st of each year and end on June 30th.

ARTICLE X AMENDMENTS

The Bylaws and the Articles of Incorporation may be amended by the Member, in consultation with the Board and subject to the Board's final, written approval.

ARTICLE XI CONFLICT OF INTEREST

Section 1. Definitions.

(a) "Conflict of Interest." - A conflict of interest occurs when a Director places himself or herself in a position where his or her personal financial interests or those of his or her family are or may be antagonistic to his or her fiduciary duty to the Corporation.

(b) "Family" - Includes, but is not limited to, grandparents, parents, spouses, partners, children, aunts, uncles, siblings, in-laws, and other relatives of a similar degree of closeness.

Section 2. Reporting and Disqualifications. Directors will report possible conflicts of interest to the President, or if the President is the interested individual, to a Vice-President, pursuant to La R.S. 17:3991 et seq. The President (or Vice-President) will make a full report to the Board prior

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to any action on the transaction by the Corporation. Upon report of a possible conflict, the Board will conduct an investigation and determine whether a conflict of interest does exist and whether it is substantial. If the Board determines that a substantial conflict of interest exists, the interested individual will not vote on the transaction presenting the conflict. The interested individual may vote only if the Board determines that no conflict exists or the conflict is not substantial. No investigation or determination by the Board will be required if the interested individual voluntarily agrees to refrain from voting on the transaction presenting the potential conflict of interest. The interested individual may be counted in determining the presence of a quorum.

Section 3. Valid Transactions. Any transaction undertaken by the Corporation in which a Director or member of his or her family has a financial interest, will be valid, notwithstanding the presence of the interested person at any meeting at which the transaction is acted upon, if the procedures outlined in Section 2 of this Article have been complied with prior to the meeting.

ARTICLE XII MISCELLANEOUS

Section 1. The Corporation may establish categories of support so that persons who regularly contribute may receive due recognition for the continuing support of the Corporation.

Section 2. It will be the policy of the Corporation to cooperate with other individuals, agencies, and organizations sharing its goals in whole or substantial part so as to avoid needless duplication of effort and to make maximum use of limited resources.

Great Hearts Lake Charles

Section 3. Prohibition Regarding Lending. The Corporation will specifically not lend money or use its credit to assist its Directors, whether or not employees or officers.

Section 4. These Bylaws of the Corporation will supplement the Articles of Incorporation and will provide for and govern the basic operation of the Corporation.

Section 5. The Corporation will not be authorized to issue memberships.

Section 6. The Corporation will comply in all respects with the Open Meetings Law (La R.S. 42:11 et seq.), the Louisiana Public Records Law (La R.S. 44:1 et seq.) and other law applicable to Louisiana's open-enrollment charter schools chartered to Corporations which qualify under § 501(c)(3) of the Internal Revenue Code.

(Remainder of page intentionally left blank)

8
ARTICLE XIII
CERTIFICATION

The original, or a copy of these bylaws, as amended or otherwise altered to date, shall be kept at the Corporation's principal office at all reasonable times during office hours. By the signature of the Secretary below, these bylaws are hereby certified to be a complete and correct copy of the above-named Corporation, duly adopted by the Board of Directors on February 28, 2024.

By: _____
David Whidden (Mar 4, 2024 11:14 CST)

David Whidden III, Board Secretary

Appendix 7: Financial Manager's Resume

Holly R. Manuel

Professional Experience Summary: A meticulous finance expert with over a decade of experience in budgeting, forecasting, and financial analysis. Proficient in effective communication across various organizational levels to achieve both immediate and long-term financial goals.

Senior Finance Manager – Great Hearts Louisiana, Inc.

September 2023 – Present

- Responsible for the overall financial health of the Louisiana Charter Academies including financial planning and analysis; financial compliance and reporting; budget and grants management; and, strategic growth planning.

Director of Finance – Skylight Lending, LLC

April 2023 – September 2023

- Responsible for developing, enhancing, and maintaining the company's financial models, forecasts, and estimates including regular updates and formalization to ensure accuracy and reliability.
- Actively support the company's long-term growth and profitability goals through my financial expertise and analysis.

Manager, Financial Planning & Analysis – Republic Finance, LLC

October 2021 – November 2022

Senior Financial Analyst

October 2020 – October 2021

Financial Analyst

July 2017 – October 2020

- Supported Executive and Senior Leadership by providing timely and accurate information driving decision making.
- Prepared and presented monthly financial packages and variance analysis to the Senior Executive Team and the Board of Directors.
- Utilized Hyperion Essbase and PowerBI to analyze and translate operational metrics into financial variances.
- Managed the financial component of the Company's contract approval process, including annual vendor financial due diligence.
- Oversaw Corporate Department budgeting, forecasting, reporting, and analysis for 25+ individual departments, including capital outlays and salary and benefits projections.
- Managed monthly borrowing base forecasting and reporting, analyzing leverage and interest coverage impacts, and coordinated the annual collateral audit with lenders and corporate leaders.
- Provided timely and accurate information to support Executive and Senior Leadership in decision-making processes.

Mortgage Loan Processor – Guaranty Bank & Trust Company – New Roads, LA

October 2015 – June 2017

Budget Analyst 3 – Louisiana Department of Education – Baton Rouge, LA

October 2014 – October 2015

- Monitored and forecasted revenues and expenditures for various means of finance via SAP Business Objects.
- Developed and maintained management reports and conducted statistical analysis using Excel and Pivot Tables.
- Prepared expenditure reports including position simulations and monthly expenditures/encumbrance reports.
- Facilitated financial reviews with Directors on all current, ongoing, and anticipated budgets.
- Prepared Joint Legislative Budget Committee (JLCB) PowerPoint Presentation materials based on annual data.
- Reviewed and approved purchase requisitions via SAP.
- Functioned as the Finance Division's Internal Point of Contact for all budget and financial related inquiries.

Financial / Information Analyst – Arvest Bank Group, Inc. – Little Rock, AR

August 2011 – June 2014

Bank Teller & Customer Service Representative - Fayetteville, AR

May 2006 – August 2011

- Oversaw an annual budget of \$175 million within the mortgage servicing division of the company.
- Performed comprehensive financial analysis on the financial statements of all business partners, conducting reviews on a quarterly or semi-annual basis.
- Conducted quarterly financial reviews with 17 department heads to assess performance and budget compliance.
- Contributed to company reporting for business ratings, including assessments by Fitch Ratings and Moody's Investor Services.
- Efficiently coordinated and prepared documentation for both internal and external audit requests and reviews.
- Produced year-end reports, certifications, and presentations tailored for government agencies and private investors and various reports for management, including bi-monthly reports for the Board of Directors.

Education

University of Arkansas, Sam M. Walton College of Business - Fayetteville, AR

Bachelor of Science in Business Administration May 2011

Major: Finance / Minor: Information Systems

Appendix 8: Insurance Plan



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
6/26/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Marsh & McLennan Agency LLC 8605 E. Raintree Drive, Suite 200 Scottsdale AZ 85260	CONTACT NAME: Darcy Swaney PHONE (A/C. No. Ext): 602-385-0513 E-MAIL ADDRESS: darcy.swaney@marshmma.com	FAX (A/C. No):
	INSURER(S) AFFORDING COVERAGE	
INSURED GreatHearts Louisiana; GreatHearts Properties Louisiana, Inc. 701 N. 44th St. Phoenix AZ 85008	INSURER A : Hanover American Insurance Company INSURER B : Allmerica Financial Benefit Insurance INSURER C : Hanover Insurance Company INSURER D : Pacific Compensation Insurance Co INSURER E : INSURER F :	
	NAIC # 36064 41840 22292 11555	

COVERAGES **CERTIFICATE NUMBER: 547545003** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ZZ4873674816	7/1/2025	7/1/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ Included \$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			AW4A03923512	7/1/2025	7/1/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ \$0			UH4873674716	7/1/2025	7/1/2026	EACH OCCURRENCE \$ 15,000,000 AGGREGATE \$ 15,000,000 \$
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	1031558	7/1/2025	7/1/2026	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER LA E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Educators Legal Liability Claims Made Coverage			ZZ4873674816	7/1/2025	7/1/2026	Each Claim \$1,000,000 Aggregate \$3,000,000 Deductible-Each Claim \$25,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Certificate holder is an additional insured with respects to General Liability coverage if required by written contract.
Coverage: Sexual Abuse & Molestation Liability
Coverage Form: Occurrence
Carrier: Hanover American Insurance Company
Policy Number: ZZ4873674816
Effective: 7/1/25 - 7/1/26
See Attached...

CERTIFICATE HOLDER **CANCELLATION**

Evidence of Coverage	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE



ADDITIONAL REMARKS SCHEDULE

AGENCY Marsh & McLennan Agency LLC		NAMED INSURED GreatHearts Louisiana; GreatHearts Properties Louisiana, Inc. 701 N. 44th St. Phoenix AZ 85008	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 **FORM TITLE:** CERTIFICATE OF LIABILITY INSURANCE

Limits: \$1,000,000 Each Loss; \$3,000,000 Aggregate
 Deductible: Nil

Umbrella limit for SAM=\$10M



Great Hearts Lake Charles

EVIDENCE OF COMMERCIAL PROPERTY INSURANCE

DATE (MM/DD/YYYY)

6/26/2025

THIS EVIDENCE OF COMMERCIAL PROPERTY INSURANCE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE ADDITIONAL INTEREST NAMED BELOW. THIS EVIDENCE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS EVIDENCE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE ADDITIONAL INTEREST.

PRODUCER NAME, CONTACT PERSON AND ADDRESS Marsh & McLennan Agency LLC 8605 E. Raintree Drive, Suite 200 Scottsdale, AZ 85260		PHONE (A/C. No, Ext): 602-956-2250	COMPANY NAME AND ADDRESS Underwriters at Lloyd's London One Lime Street, EC3M 7HA London, UK	NAIC NO: 55555
FAX (A/C. No):	E-MAIL ADDRESS: darcy.swaney@marshmma.com		IF MULTIPLE COMPANIES, COMPLETE SEPARATE FORM FOR EACH	
CODE: AGENCY CUSTOMER ID #:	SUB CODE:	POLICY TYPE Property		
NAMED INSURED AND ADDRESS GreatHearts Properties Louisiana, Inc. 11801 Bluebonnet Blvd. Baton Rouge LA 70810		LOAN NUMBER	POLICY NUMBER AMR8455401	
ADDITIONAL NAMED INSURED(S)		EFFECTIVE DATE 07/01/2025	EXPIRATION DATE 07/01/2026	<input type="checkbox"/> CONTINUED UNTIL TERMINATED IF CHECKED
		THIS REPLACES PRIOR EVIDENCE DATED:		

PROPERTY INFORMATION (ACORD 101 may be attached if more space is required) BUILDING OR BUSINESS PERSONAL PROPERTY


LOCATION / DESCRIPTION Building Limit: \$23,355,650 See Attached...
THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS EVIDENCE OF PROPERTY INSURANCE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

COVERAGE INFORMATION		PERILS INSURED	BASIC	BROAD	<input checked="" type="checkbox"/>	SPECIAL	
COMMERCIAL PROPERTY COVERAGE AMOUNT OF INSURANCE: \$ See Below		DED: \$25,000					
		YES	NO	N/A			
<input checked="" type="checkbox"/> BUSINESS INCOME	<input type="checkbox"/> RENTAL VALUE	X			If YES, LIMIT: 1,500,000	<input checked="" type="checkbox"/>	Actual Loss Sustained; # of months:
BLANKET COVERAGE			X		If YES, indicate value(s) reported on property identified above: \$		
TERRORISM COVERAGE		X			Attach Disclosure Notice / DEC		
IS THERE A TERRORISM-SPECIFIC EXCLUSION?			X				
IS DOMESTIC TERRORISM EXCLUDED?				X			
LIMITED FUNGUS COVERAGE		X			If YES, LIMIT: 15,000		DED:
FUNGUS EXCLUSION (If "YES", specify organization's form used)				X			
REPLACEMENT COST		X					
AGREED VALUE		X					
COINSURANCE			X		If YES, %		
EQUIPMENT BREAKDOWN (If Applicable)		X			If YES, LIMIT:		DED: \$25,000
ORDINANCE OR LAW - Coverage for loss to undamaged portion of bldg		X			If YES, LIMIT: Inc in Bldg Limi		DED:
- Demolition Costs		X			If YES, LIMIT: 10%, max \$1M		DED:
- Incr. Cost of Construction		X			If YES, LIMIT: Inc w/Cov B		DED:
EARTH MOVEMENT (If Applicable)			X		If YES, LIMIT:		DED:
FLOOD (If Applicable)			X		If YES, LIMIT:		DED:
WIND / HAIL INCL <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO Subject to Different Provisions:		X			If YES, LIMIT:		DED: 1%, min \$100K
NAMED STORM INCL <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO Subject to Different Provisions:		X			If YES, LIMIT:		DED: 3%, min \$100K
PERMISSION TO WAIVE SUBROGATION IN FAVOR OF MORTGAGE HOLDER PRIOR TO LOSS				X			

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

ADDITIONAL INTEREST

<input type="checkbox"/> CONTRACT OF SALE <input type="checkbox"/> MORTGAGEE	<input type="checkbox"/> LENDER'S LOSS PAYABLE <input type="checkbox"/> LOSS PAYEE	LENDER SERVICING AGENT NAME AND ADDRESS
NAME AND ADDRESS Evidence of Coverage		AUTHORIZED REPRESENTATIVE 

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ADDITIONAL REMARKS SCHEDULE

AGENCY Marsh & McLennan Agency LLC		NAMED INSURED GreatHearts Properties Louisiana, Inc. 11801 Bluebonnet Blvd. Baton Rouge LA 70810	
POLICY NUMBER AMR8455401		EFFECTIVE DATE: 07/01/2025	
CARRIER Underwriters at Lloyd's London	NAIC CODE 55555		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 28 **FORM TITLE:** EVIDENCE OF COMMERCIAL PROPERTY INSURANCE

LOCATION/DESCRIPTION:

Contents Limit: \$701,820
 BI/EE Limit: \$1,500,000



ADDITIONAL REMARKS SCHEDULE

AGENCY Marsh and McLennan Agency, LLC		NAMED INSURED Greathearts America, LLC dba GH America Greathearts Arizona, Greathearts Louisiana 701 N. 44th St. Phoenix AZ 85008	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 **FORM TITLE:** CERTIFICATE OF LIABILITY INSURANCE

Effective: 7/1/25- 7/1/26
 Limits: \$1,000,000 Each Loss; \$3,000,000 Aggregate
 Deductible: Nil

Workers Compensation
 Carrier: Argonaut Insurance Company
 Policy Number: WC929248817234
 Effective: 7/1/25 - 7/1/26
 Limits: EL Each Accident: \$1,000,000; EL Disease Each Employee: \$1,000,000; EL Disease Policy Limit: \$1,000,000

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

BLANKET ADDITIONAL INSURED - PRIMARY AND NON-CONTRIBUTORY

This endorsement modifies insurance provided under the following:

BUSINESS AUTO COVERAGE PART

A. The following is added to SECTION II - LIABILITY COVERAGE, Paragraph A.1. Who Is An Insured:

Additional Insured if Required by Contract

If you agree in a written contract, written agreement or written permit that a person or organization be added as an additional "insured" under this Coverage Part, such person or organization is an "insured"; but only to the extent that such person or organization qualifies as an "insured" under paragraph A.1.c. of this Section.

If you agree in a written contract, written agreement or written permit that a person or organization be added as an additional "insured" under this Coverage Part, the most we will pay on behalf of such additional "insured" is the lesser of:

- (1) The Limits of Insurance for liability coverage specified in the written contract, written agreement or written permit; or
- (2) The Limits of Insurance for Liability Coverage shown in the Declarations applicable to this Coverage Part.

Such amount shall be part of and not in addition to the Limits of Insurance shown in the Declarations applicable to this Coverage Part. Regardless of the number of covered "autos", "insureds", premiums paid, claims made or vehicles involved in the "accident", the most we will pay for the total of all damages and "covered pollution cost or expense" combined resulting from any one "accident" is the Limit of Insurance for Liability Coverage shown in the Declarations.

B. The following is added to SECTION IV - BUSINESS AUTO CONDITIONS, Paragraph B. General Conditions, subparagraph 5. Other Insurance:

Primary and Non-Contributory

If you agree in a written contract, written agreement or written permit that the insurance provided to a person or organization who qualifies as an additional "insured" under SECTION II - LIABILITY COVERAGE, Paragraph A.1. Who Is An Insured, subparagraph Additional Insured if Required by Contract is primary and non-contributory, the following applies:

The liability coverage provided by this Coverage Part is primary to any other insurance available to the additional "insured" as a Named Insured. We will not seek contribution from any other insurance available to the additional "insured" except:

- (1) For the sole negligence of the additional "insured"; or
- (2) For negligence arising out of the ownership, maintenance or use of any "auto" not owned by the additional "insured" or by you, unless that "auto" is a "trailer" connected to an "auto" owned by the additional "insured" or by you; or
- (3) When the additional "insured" is also an additional "insured" under another liability policy.

C. This endorsement will apply only if the "accident" occurs:

1. During the policy period;
2. Subsequent to the execution of the written contract or written agreement or the issuance of the written permit; and
3. Prior to the expiration of the period of time that the written contract, written agreement or written permit requires such insurance to be provided to the additional "insured".

D. Coverage provided to an additional "insured" will not be broader than coverage provided to any other "insured" under this Coverage Part.

ALL OTHER TERMS, CONDITIONS, AND EXCLUSIONS REMAIN UNCHANGED.

Great Hearts Lake Charles

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

COMMERCIAL GENERAL LIABILITY ENHANCEMENT ENDORSEMENT – EDUCATIONAL INSTITUTIONS

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SUMMARY OF COVERAGES

1.	Additional Insured – Broad Form Vendors	Included
2.	Additional Insured – Board Members, Trustees, Student Teachers, Safety Patrol and Approved Groups	Included
3.	Aggregate Limit Per Location	Included
4.	Aircraft, Auto or Watercraft Amendments	Included
5.	Broad Form Named Insured	Included
6.	Broadcasting and Publication – Personal and Advertising Injury	Included
7.	Clinic or Hospital Exclusion	Included
8.	Medical Payments – Student Exclusion	Included
9.	Mobile Equipment Redefined	Included
10.	Personal Injury – Broad Form	Included
11.	Personal Injury – Televised or Videotaped Publication	Included
12.	Property Damage Legal Liability – Broad Form - Fire, Lightning, Explosion, Smoke and Leakage from Fire Protective Systems Damage Limit	\$1,000,000
13.	Who Is An Insured Extension – Co-employees and Volunteer Workers	Included

This endorsement amends coverages provided under the Commercial General Liability Coverage Part through new coverages, higher limits and broader coverage grants.

1. Additional Insured – Broad Form Vendors

The following is added to **SECTION II – WHO IS AN INSURED**:

Additional Insured – Broad Form Vendors

- a. Any person or organization that is a vendor with whom you agreed in a written contract or written agreement to include as an additional insured under this Coverage Part is an insured, but only with respect to liability for “bodily injury” or “property damage” arising out of “your products” which are distributed or sold in the regular course of the vendor’s business.
- b. The insurance afforded to such vendor described above:
 - (1) Only applies to the extent permitted by law;
 - (2) Will not be broader than the insurance which you are required by the contract or agreement to provide for such vendor;

(3) Will not be broader than coverage provided to any other insured; and

(4) Does not apply if the “bodily injury”, “property damage” or “personal and advertising injury” is otherwise excluded from coverage under this Coverage Part, including any endorsements thereto

- c. With respect to insurance afforded to such vendors, the following additional exclusions apply:

The insurance afforded to the vendor does not apply to:

(1) “Bodily injury” or “property damage” for which the vendor is obligated to pay damages by reasons of the assumption of liability in a contract or agreement. This exclusion does not apply to liability for damages that the insured would have in the absence of the contract or agreement;

Great Hearts Lake Charles

- (2) Any express warranty unauthorized by you;
- (3) Any physical or chemical change in the product made intentionally by the vendor;
- (4) Repackaging, unless unpacked solely for the purpose of inspection, demonstration, testing, or the substitution of parts under instruction from the manufacturer, and then repackaged in the original container;
- (5) Any failure to make such inspection, adjustments, tests or servicing as the vendor has agreed to make or normally undertakes to make in the usual course of business in connection with the sale of the product;
- (6) Demonstration, installation, servicing or repair operations, except such operations performed at the vendor's premises in connection with the sale of the product;
- (7) Products which, after distribution or sale by you, have been labeled or relabeled or used as a container, part or ingredient of any other thing or substance by or for the vendor;
- (8) "Bodily injury" or "property damage" arising out of the sole negligence of the vendor for its own acts or omissions or those of its employees or anyone else acting on its behalf. However, this exclusion does not apply to:
 - (a) The exceptions contained within the exclusion in subparagraphs (4) or (6) above; or
 - (b) Such inspections, adjustments, tests or servicing as the vendor has agreed to make or normally undertakes to make in the usual course of business, in connection with the distribution or sale of the products.
- (9) "Bodily injury" or "property damage" arising out of an "occurrence" that took place before you have signed the contract or agreement with the vendor.
- (10) To any person or organization included as an insured by another endorsement issued by us and made part of this Coverage Part.
- (11) Any insured person or organization, from whom you have acquired such products, or any ingredient, part or container, entering into, accompanying or containing such products.

- d. With respect to the insurance afforded to these vendors, the following is added to **SECTION III – LIMITS OF INSURANCE:**

The most we will pay on behalf of the vendor for a covered claim is the lesser of the amount of insurance:

1. Required by the contract or agreement described in paragraph a.; or
2. Available under the applicable Limits of Insurance shown in the Declarations;

This endorsement shall not increase the applicable Limits

2. Additional Insured – Board Members, Trustees, Student Teachers, Safety Patrol, and Approved Groups

- a. The following is added to **SECTION II – WHO IS AN INSURED:**

Each of the following is also an insured but only with respect to their duties in connection with the positions described below:

- (1) Any of your trustees or members of your Board of Governors if you are a private charitable or educational institution;
- (2) Any of your board members or commissioners if you are a public board or commission; or
- (3) Any student teacher teaching as part of their educational requirements.

Each of the following is also an insured:

- (4) Any of your elementary, middle, junior high or high school students who are volunteer members of a safety patrol, which you organize or operate, but only for "bodily injury" or "property damage" that occurs while performing duties related to the conduct of such safety patrol.
- (5) Parent Groups, Alumni Groups, and Student Groups and their members, but only if the Group is sanctioned, approved, organized and/or supervised by the Named Insured, and only with respect to activities that are necessary to the sanctioned or approved purpose of the Group.
- (6) Parents or legal guardians of students involved in safety patrol or a Student Group but only because of "bodily injury" or "property damage" arising out of the operation of such safety patrol or Student Group.

- b. For the purpose of this coverage only, the following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS, 4. Other Insurance, b. Excess Insurance:**

The insurance coverage provided under **ADDITIONAL INSURED – BOARD**

MEMBERS, TRUSTEES, STUDENT TEACHERS, SAFETY PATROL AND APPROVED GROUPS of this endorsement is excess over any other valid and collectible insurance (including deductible or self-insured retention) or agreement of indemnity available to the insured, whether primary, excess, contingent, or on any other basis. When this insurance is excess, we have the right but not the duty to defend any claim or "suit".

Other valid and collectible insurance includes, but is not limited to, policies or insurance programs purchased or established by or on behalf of an insured to insure against liability arising from activities of an insured and its "employees", whether primary, excess, contingent, or on any other basis. The person seeking coverage shall cooperate with us to determine the existence, availability and coverage of any such other insurance policy, insurance program or defense or indemnification arrangement.

Other valid and collectible insurance does not include any umbrella policy issued by us or any coverage specifically issued by us as excess over this policy. Nothing in this provision shall be construed to require any such umbrella or excess coverage issued by us to apply unless and until all other valid and collectible insurance is exhausted.

c. SECTION V – DEFINITIONS, 19. "Temporary worker" is replaced by the following:

19. "Temporary worker" means a person who is furnished to you to substitute for a permanent "employee" on leave or to meet seasonal or short-term workload conditions. "Temporary worker" does not include a substitute teacher.

3. Aggregate Limit Per Location

a. SECTION III – LIMITS OF INSURANCE, the General Aggregate Limit applies separately to each of your "locations" owned by or rented to you.

b. For purpose of this coverage only, the following is added to **SECTION V – DEFINITIONS:**

1. "Location" means premises involving the same or connecting lots, or premises whose connection is interrupted only by a street, roadway, waterway or right-of-way of a railroad.

4. Aircraft, Auto Or Watercraft Amendments

SECTION I – COVERAGES, COVERAGE A – BODILY INJURY AND PROPERTY DAMAGE

LIABILITY, 2. Exclusions, g. Aircraft, Auto or Watercraft is replaced by the following:

This insurance does not apply to:

g. Aircraft, Auto or Watercraft

"Bodily injury" or "property damage" arising out of the ownership, maintenance, operation, use, "loading or unloading" or entrustment to others of any aircraft, "auto" or watercraft that is owned, operated or "hired" by, or rented or loaned to any insured.

As used in this exclusion, "hired" includes any contract to furnish transportation of your students to and from schools.

This exclusion applies even if the claim against an insured alleges negligence or other wrongdoing in the supervision, hiring, employment, training or monitoring of others by that insured, if the "occurrence" which caused the "bodily injury" or "property damage" involved the ownership, maintenance, use or entrustment to others of any aircraft, "auto" or watercraft that is owned, operated or "hired" by or rented or loaned to any insured.

This exclusion does not apply to:

- (1)** A watercraft while ashore on premises you own or rent;
- (2)** A watercraft you do not own that is:
 - (a)** Less than 51 feet long; and
 - (b)** Not being used to carry persons or property for a charge;
- (3)** Parking an "auto" on, or on the ways next to, premises you own or rent, provided the "auto" is not owned by or rented, "hired" or loaned to you or the insured;
- (4)** Liability assumed under any "insured contract" for the ownership, maintenance or use of aircraft or watercraft;
- (5)** "Bodily injury" or "property damage" arising out of:
 - (a)** The operation of machinery or equipment that is attached to, or part of, a land vehicle that would qualify under the definition of "mobile equipment" if it were not subject to a compulsory or financial responsibility law or other motor vehicle insurance law in the state where it is licensed or principally garaged; or
 - (b)** The operation of any of the machinery or equipment listed in paragraphs **f.(2)** or **f.(3)** of the definition of "mobile equipment";

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- (6) "Bodily injury" or "property damage" arising out of any non-motorized recreational watercraft used for sailing, rowing or sculling that is owned, used by, or rented to an insured;
- (7) An aircraft that you do not own that is hired, chartered or loaned with a paid crew and not owned by any insured.
- (8) "Bodily injury" or other injury arising out of a sexual misconduct or sexual molestation incident to the extent coverage is provided under an endorsement to this policy providing sexual misconduct or sexual molestation liability coverage.

With respect to the insurance provided under item (2), this provision applies to any person who, with your consent, either uses or is responsible for the use of a watercraft.

With respect to the insurance provided under item (6), **SECTION II – WHO IS AN INSURED** is amended to include as an insured any person or organization legally responsible for the use of any such recreational watercraft used for sailing, rowing or sculling that you own, provided the actual use is with your permission.

The insurance provided under item (7) is excess over any other valid and collectible insurance (including deductible or self-insured retention) or agreement of indemnity available to the insured, whether primary, excess, contingent, or on any other basis. When this insurance is excess, we have the right but no duty to defend any claim or "suit".

Other valid and collectible insurance includes, but is not limited to, policies or insurance programs purchased or established by or on behalf of an insured to insure against liability arising from activities of an insured and its "employees", whether primary, excess, contingent, or on any other basis. The person seeking coverage shall cooperate with us to determine the existence, availability and coverage of any such other insurance policy, insurance program or defense or indemnification arrangement.

Other valid and collectible insurance does not include any umbrella policy issued by us or any coverage specifically issued by us as excess over this policy. Nothing in this provision shall be construed to require any such umbrella or excess coverage issued by us to apply unless and until all other valid and collectible insurance is exhausted

5. Broad Form Named Insured

If you are designated in the Declarations as anything other than an individual, then any organization:

- a. Over which you maintained a combined ownership interest of more than 50% on the effective date of this policy;
- b. That is not a partnership, joint venture or limited liability company; and
- c. That is not excluded by any endorsement to this policy, will qualify as a Named Insured if there is no other similar insurance available to that organization, or that would be available but for exhaustion of its limits.

Any such organization will cease to qualify as a Named Insured as of the date during the policy period when the combined ownership interest of the Named Insureds in the organization equals or falls below 50%.

6. Broadcasting And Publication – Personal And Advertising Injury

- a. The following is added to **SECTION I – COVERAGES, COVERAGE B – PERSONAL AND ADVERTISING INJURY LIABILITY, 2. Exclusions, j. Insureds In Media And Internet Type Businesses:**

Exclusion j.(1) does not apply to "personal and advertising injury" within the scope of your activities as an educational institution.

- b. The following exclusions are added to **SECTION I – COVERAGES, COVERAGE B – PERSONAL AND ADVERTISING INJURY LIABILITY, 2. Exclusions:**

This insurance does not apply to:

- a. "Personal and Advertising Injury" arising out of the actual or alleged unauthorized collection, use or dissemination of internet user information through web cookies or other online profiling purposes by or on behalf of the insured or for the unlawful access to or invasion of any computer software, operating system or network electronic mail or voice mail system by or on behalf of the insured.
- b. "Personal and Advertising Injury" arising out of any claim or "suit" made by ASCAP, SESAC, BMI, RIAA or any other music licensing entity on their behalf or for others alleging the insured's failure to procure or maintain requisite licenses or payment of royalties.
- c. "Personal and Advertising Injury" arising out of an investigation or proceeding initiated by an administrative or regulatory agency, including, but not limited to, the

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Federal Trade Commission or the Federal Communications Commission.

- c. The following is added to **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS:**

Retraction or Correction of Erroneous Matter

Retraction or correction shall be promptly made of any matter which has been published or broadcast through error or mistake, or which is untrue.

- d. **SECTION V – DEFINITIONS, 1.** "Advertisement" is replaced by the following:

1. "Advertisement" means a notice that is broadcast or published to the general public or specific market segments about your goods, products or services for the purpose of attracting customers or supporters. For the purpose of this definition:

- a. Notices that are published include material placed on the Internet or on similar electronic means of communication, but only with respect to your goods, products or services for the purpose of attracting customers or supporters; and
- b. Regarding web-sites, only that part of a web-site that is about your goods, products or services for the purposes of attracting customers or supporters is considered an "advertisement".

7. Clinic Or Hospital Exclusion

The following is added to **SECTION I – COVERAGES, COVERAGE A – BODILY AND PROPERTY DAMAGE LIABILITY, 2. Exclusions** and **SECTION I – COVERAGES, COVERAGE B – PERSONAL AND ADVERTISING INJURY LIABILITY, 2. Exclusions:**

Clinic or Hospital

If an insured owns or operates a clinic or hospital, this insurance does not apply to "bodily injury," "property damage," or "personal and advertising injury" caused by:

- (1) The rendering of or failure to render:
 - (a) Medical, surgical, dental, x-ray or nursing service, treatment, advice or instruction, or the related furnishing of food or beverages;
 - (b) Any health or therapeutic service, treatment, advice or instruction; or
 - (c) Any service, treatment, advice or instruction for the purpose of appearance

or skin enhancement, hair removal or replacement or personal grooming.

- (2) The furnishing or dispensing of drugs or medical, dental or surgical supplies or appliances; or
- (3) The handling or treatment of dead bodies, including autopsies, organ donation or other procedures.

8. Medical Payments – Student Exclusion

The following is added to **SECTION I – COVERAGES, COVERAGE C – MEDICAL PAYMENTS, 2. Exclusions:**

Students

We will not pay expenses for "bodily injury" to your student.

9. Mobile Equipment Redefined

SECTION V – DEFINITIONS, 12. "Mobile equipment", paragraph f.(1) does not apply to self-propelled vehicles of less than 1,000 pounds gross vehicle weight.

10. Personal Injury – Broad Form

a. **SECTION I – COVERAGES, COVERAGE B – PERSONAL AND ADVERTISING INJURY LIABILITY, 2. Exclusions, e. Contractual Liability** is deleted.

b. **SECTION V – DEFINITIONS, 14.** "Personal and advertising injury", paragraph b. is replaced by the following:

b. Malicious prosecution or abuse of process.

c. The following is added to **SECTION V – DEFINITIONS, 14.** "Personal and advertising injury":

"Discrimination" (unless insurance thereof is prohibited by law) that results in injury to the feelings or reputation of a natural person, but only if such "discrimination" is:

(1) Not done intentionally by or at the direction of:

(a) The insured;

(b) Any officer of the corporation, director, stockholder, partner or member of the insured; and

(2) Not directly or indirectly related to an "employee", not to the employment, prospective employment or termination of any person or persons by an insured.

d. For the purposes of this endorsement only, the following is added to **SECTION V – DEFINITIONS:**

1. "Discrimination" means the unlawful treatment of individuals based upon race,

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color, ethnic origin, gender, religion, age, or sexual preference. "Discrimination" does not include the unlawful treatment of individuals based upon developmental, physical, cognitive, mental, sensory or emotional impairment or any combination of these.

- e. This coverage does not apply if **COVERAGE B – PERSONAL AND ADVERTISING INJURY LIABILITY** is excluded either by the provisions of the Coverage Form or by endorsement.

11. Personal Injury – Televised Or Videotaped Publication

SECTION V – DEFINITIONS, 14. "Personal and advertising injury", paragraphs d. and e. are replaced by the following:

- d. Oral or written publication, in any manner, or televised or videotaped publication, of material that slanders or libels a person or organization or disparages a person's or organization's goods, products or services;
- e. Oral or written publication, in any manner, or televised or videotaped publication, of material that violates a person's right of privacy;

12. Property Damage Legal Liability – Broad Form

- a. **SECTION I – COVERAGES, COVERAGE A – BODILY INJURY AND PROPERTY DAMAGE LIABILITY**, the last paragraph (after the exclusions) is replaced by the following:

Exclusions c. through n. do not apply to damage by fire, lightning, explosion, smoke or leakage from fire protective systems to premises while rented to you or temporarily occupied by you with the permission of the owner. A separate limit of insurance applies to this coverage as described in **SECTION III – LIMITS OF INSURANCE.**

- b. **SECTION III – LIMITS OF INSURANCE**, paragraph 6. is replaced by the following:

6. Subject to paragraph 5. above, The Damage to Premises Rented to You Limit is the most we will pay under **COVERAGE A** for damages because of "property damage" to any one premises from fire, lightning, explosion, smoke and leakage from fire protective systems to premises, while rented to you or temporarily occupied by you with permission of the owner.

The Damage to Premises Rented to You Limit is the higher of:

- a. \$1,000,000; or

- b. The Damage to Premises Rented to You Limit shown in the Declarations.

This limit will apply to all damage caused by the same event, whether such damage results from fire, lightning, explosion, smoke, leakage from fire protective systems or any combination of any of these.

- c. **SECTION IV – COMMERCIAL GENERAL LIABILITY CONDITIONS, 4. Other Insurance, b. Excess Insurance**, paragraph (a)(ii) is replaced by the following:

(ii) That is fire, lightning, explosion, smoke or leakage from fire protective systems insurance for premises rented to you or temporarily occupied by you with permission of the owner; or

- d. **SECTION V – DEFINITIONS, 9. "Insured contract"**, paragraph a. is replaced by the following:

a. A contract for a lease of premises. However, that portion of the contract for a lease of premises that indemnifies any person or organization for damage by fire, lightning, explosion, smoke or leakage from fire protective systems to premises while rented to you or temporarily occupied by you with permission of the owner is not an "insured contract".

- e. This coverage does not apply if Damage to Premises Rented to You is excluded either by the provisions of the Coverage Part or by endorsement.

13. Who Is An Insured Extension – Co-employees And Volunteer Workers.

- a. **SECTION II – WHO IS AN INSURED**, paragraph 2.a. is replaced by the following:

2. Each of the following is also an insured:

a. Your "volunteer workers" only while performing duties related to the conduct of your business, your "employees", other than either your "executive officers" (if you are an organization other than a partnership, joint venture or limited liability company) or your managers (if you are a limited liability company), but only for acts within the scope of their employment by you or while performing duties related to the conduct of your business.

However, none of these "employees" or "volunteer workers" are insureds for:

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(1) "Bodily injury" or "personal and advertising injury":

(a) To you, to your partners or members (if you are a partnership or joint venture), or to your members (if you are a limited liability company);

(b) For which there is any obligation to share damages with or repay someone else who must pay damages because of the injury described in paragraph **(1)(a)** above;

(c) Arising out of his or her providing or failing to provide professional health care services; or

(d) Arising out of "employment related practices"

(2) "Property damage" to property:

(a) Owned, occupied or used by,

(b) Rented to, in the care, custody or control of, or over which physical control is being exercised for any purpose by you, any of your "employees", "volunteer workers", any partner or member (if you are a partnership or joint venture), or any member (if you are a limited liability company).

For the purpose of this endorsement, "employment-related practices" includes but is not limited to refusal to employ a person, termination of a person's employment, or practices, policies, acts or omissions related to employment, such as coercion, demotion, evaluation, re-assignment, discipline, defamation, harassment, humiliation, or discrimination directed at a person.

ALL OTHER TERMS, CONDITIONS, AND EXCLUSIONS REMAIN UNCHANGED.

7/1/2025-Named Insured Schedule

Greathearts America dba GH America
Greathearts Arizona dba GH Arizona
GreatHearts Florida dba GH Jacksonville
GreatHearts Properties Florida, Inc. dba GH Property Florida
GreatHearts Florida Classical
Greathearts Foundation dba GH Foundation
GreatHearts Louisiana dba GH Louisiana (separate Property policy)
GreatHearts Louisiana dba Haverston (separate Property policy)
GreatHearts Properties Louisiana, Inc., dba GH Properties Louisiana (separate Property policy)
GreatHearts Micro Schools dba Micro Schools
GreatHearts Nova dba GH Nova
Anthem Preparatory Academy dba Anthem Prep
Archway Classical Academy Arete dba Arete Archway
Archway Classical Academy Chandler dba Chandler Archway
Archway Classical Academy Cicero dba Cicero Archway
Archway Classical Academy Glendale dba Glendale Archway
Archway Classical Academy Lincoln dba Lincoln Archway
Archway Classical Academy North Phoenix dba North Phoenix Archway
Archway Classical Academy Scottsdale dba Scottsdale Archway
Archway Classical Academy Trivium West
Archway Classical Academy Veritas, LLC dba Veritas Archway
Arete Preparatory Academy dba Arete Prep
Chandler Preparatory Academy dba Chandler Prep
Cicero Preparatory Academy dba Cicero Prep
Classical Education of Arizona
Glendale Preparatory Academy dba Glendale Prep
Lincoln Preparatory Academy dba Lincoln Prep
Maryvale Preparatory Academy dba Maryvale Prep
North Phoenix Preparatory Academy dba North Phoenix Prep
Roosevelt Preparatory Academy (FKA Archway Classical Academy of Trivium East)
Scottsdale Preparatory Academy dba Scottsdale Prep
Trivium Preparatory Academy dba Trivium Prep
Veritas Preparatory Academy dba Veritas Prep
Young Hearts dba Young Hearts
Great Hearts Academies 401K Plan (Crime)
GreatHearts Christos, LLC dba GH Christos
Christos Gilbert
Christos Maryvale
Christian Classical Collaborative

Appendix 9: Outline of Course Offerings by Diploma Type(s)

Great Hearts Lake Charles

N/A: Great Hearts Lake Charles plans to implement a slow growth model for our K-12 charter school, starting by serving grades K-3 in 2027-28 and reaching full scale, K-12, in 2036-37. Great Hearts Lake Charles will begin serving high school students in Year 7 of Operation.

**Appendix 10:
Table of AP, Dual Enrollment, ACT
Prep, and CTE Course Offerings**

Great Hearts Lake Charles

N/A: Great Hearts Lake Charles plans to implement a slow growth model for our K-12 charter school, starting by serving grades K-3 in 2027-28 and reaching full scale, K-12, in 2036-37. Great Hearts Lake Charles will begin serving high school students in Year 7 of Operation.

**Appendix 11:
Draft Corporate Partnerships
MOU/Contract**

Great Hearts Lake Charles

Great Hearts Lake Charles does not have a Corporate Partnership.

Appendix 12: ESP Independent Audit

Great Hearts Lake Charles

N/A: Great Hearts Lake Charles will not contract with an Educational Service Provider

Appendix 13: Draft ESP MOU or Contract

Great Hearts Lake Charles

N/A: Great Hearts Lake Charles will not contract with an Educational Service Provider