



Proposal Overview Form

The Proposal Overview Form is part of the Part 1 Eligibility Determination & Threshold for Evaluation and should be submitted via the [Fluid Review portal](#). Submitted documentation should include only the information requested below, saved in a single PDF file.

Non-Profit Information			
Name of Nonprofit Applicant (as registered with Louisiana Secretary of State)	The Next Generation Academy		
Application Type	<u>Type 1</u> <input checked="" type="checkbox"/>	<u>Type 3</u> <input type="checkbox"/>	
Instruction Location. Mark whether instruction will be primarily site based (in person, in a school building) or virtual (computer based).	<u>Site Based</u> <input checked="" type="checkbox"/>	<u>Virtual</u> <input type="checkbox"/>	
If a Type 1 Applicant, please select your proposal type	<u>New Start</u> <input checked="" type="checkbox"/>	<u>Transformation – Full Takeover</u> <input type="checkbox"/>	<u>Transformation – Reconfiguration</u> <input type="checkbox"/>
Operator Track		<u>New Operator</u> <input checked="" type="checkbox"/>	<u>Experienced Operator</u> <input type="checkbox"/>
Primary Contact Information			
Name	Dr. Bethel E. Cager, Founder/CEO/Head of School		
Address	[REDACTED]		
Phone	[REDACTED]		
Email	bcager1908@gmail.com		
School Leader Information			
Proposed school leader name (if identified)	Dr. Bethel E. Cager		
Proposed school leader current job/position	Consultant		
List any principal/leadership programs the proposed leader is currently enrolled in or have completed (e.g., NLNS, BES, etc.)	New School for New Orleans Innovative Schools Fellowship		
School Information			
Proposed School Name	The Next Generation Academy		
Opening Year	Fall 2019		
Grades served Year 1	7th, 8th, 9th		
Grades served at capacity	7th through 12th		



Enrollment Projection Form

Provide the following information for each school included in this proposal. Specify the planned year of opening for each (duplicating the table as needed).

School Name:	The Next Generation Academy
Pursuant to OPSB Policy HA, Section 6, will your school have any proposed Focus Programs or Mission-Specific Admissions Preferences?	Focus: Civic and Community Engagement Planned Year of Opening: Fall 2019

Grade Level	Number of Students					
	Year 1:	Year 2:	Year 3:	Year 4:	Year 5:	Year at Capacity:
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7	100	100	100	100	100	100
8	100	100	100	100	100	100
9	100	100	100	100	100	100
10		100	100	100	100	100
11			100	100	100	100
12				100	100	100
MINIMUM ENROLLMENT	225	300	375	450	450	450
BUDGETED ENROLLMENT	300	400	500	600	600	600
MAXIMUM ENROLLMENT	375	500	625	750	750	750



Enrollment Plans

What is your minimum operating enrollment? What adjustments to the budget, staffing and/or academic model would be made to accommodate this minimum enrollment?

The NGA will be budgeted for 4 sections per grade level in grades 7 through 12 for a full capacity total of 600 students. However, in an effort to prepare for enrollment that is under or over the budgeted amount, we have identified a minimum enrollment of 3 sections per grade level and a maximum enrollment of 5 sections per grade level.

Preserving the fullest integrity of the instructional and civic programming for our students is the absolute priority. Therefore, to accommodate in the occurrence of the minimum enrollment, reductions will take place furthest away from the classroom. This would require that we thoroughly examine all operational and administrative expenses. It is only after all recourses have been exhausted regarding operational and administrative expenses will reductions take place at the instructional level.

As a last resort, adjustments will be made at the instructional level that may include combining of grade levels when possible and reducing certain elective and special staff to part-time status. In an extreme situation, we may even have to consider adjusting the venue of a few courses from site based to virtual.



School Management Form

Do any of the following describe your organization or any of the school(s) proposed in this application?

Will contract or partner with an education service provider (ESP) or other organization to provide school management services.

If so, identify the provider: 4th Sector Solutions

Will have a corporate partner as defined in LA R.S. 17:491.1.

If so, identify the partner: _____

Will reflect the conversion of an existing public school (Type 3 application).

If so, identify the school: _____

The applicant has previously participated in the OPSB charter RFA process.

If so, is the application currently on appeal to the State? _____

Already operates schools in Louisiana or elsewhere in the US (indicate which state(s) below)

Certification

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate. I recognize that any misrepresentation could result in disqualification from the application process or revocation afterward. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the organization.

Bethel E. Cager
Signature of Application Primary Contact

July 15, 2018
Date

Bethel E. Cager, Ph.D. – Founder/CEO/Head of School
Print Name & Title of Application Primary Contact



Assurances Form

Please review the statements below and indicate whether each is true, and will hold true if the application is approved. *If the answer to any item above is "No", please submit a statement of explanation.*

	Yes	No
1. The school and/or governing organization is currently registered as a nonprofit and is listed as in good standing with the Louisiana Secretary of State	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. The school is not affiliated with any religious organization and does not support nor engage in any religious activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. 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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. 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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. The school does not draw a substantial portion of the employees from an existing private school	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. The school does not receive a substantial portion of assets or property from an existing private school	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Will your school seek approval to operate within OPSB's LEA for federal funding and compliance purposes?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8. The school is not located at the same site as an existing private school	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9. The school will participate in the city-wide common enrollment (OneApp) process	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10. The school will participate in the city-wide common expulsion process	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11. The school will provide free transportation to students as stipulated in OPSB Policy HA	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

Dr. Donaldo R. Batiste

Name of Board Chair, Charter Governing Board


Signature of Board Chair

July 15, 2018

Date



Teacher Eligibility Form

Louisiana state law requires that all groups submitting charter applications involve a minimum of three Louisiana teachers certified by the State Board of Elementary and Secondary Education in the development of their application. Please use this form to identify the certified teachers participating in the development of this application. *Also, please be sure to include a copy of current LA Teacher Certifications for the teachers listed.*

	Name	Street Address	ZIP Code	Phone	Email
1	Dr. Bethel E Cager, Founder	4518 Allen St, New Orleans, LA	70122	(262) 989-7765	bcager1908@gmail.com
2	Monique J Handy, Founder	16 Seaward Ct, New Orleans, LA	70131	(504) 957-8765	moniquejhandy@gmail.com
3	Leila J Eames, Founder	5420 Eastover Dr S, New Orleans, LA	70128	(504) 259-7956	leilaeames@hotmail.com



Board Member Roster

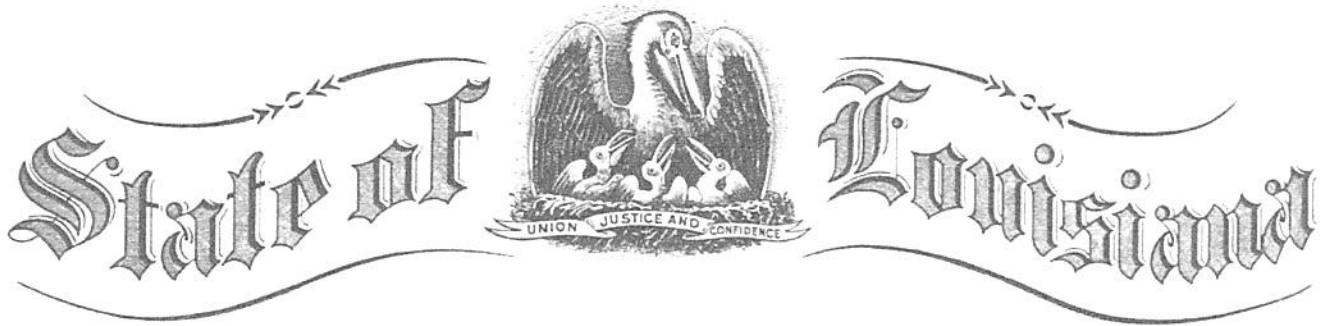
Please list all the proposed board members for the non-profit applying to open this school. In order to be eligible to apply, applicants are required to have at least three board members. In order to be eligible for final Board approval, applicants are required to have five board members. State law requires a minimum of seven board members in order to execute a valid charter agreement, and at all times that a charter school is operational.

- **Resumes:** Please include a current resume for all board members identified
- **Background Checks:** All New Operators and Experienced Operators *not* currently operating a charter school in Louisiana must submit LA State Background checks for each board member identified by August 6, 2018.

Name of Non-Profit Applicant (as registered with Louisiana Secretary of State)

#	Name	Street Address	Zip-code	Phone	Email	Expertise ¹
1	Donaldo R. Batiste	[REDACTED]			drbatiste53@aol.com	Education & Organizational Operations
2	Stephanie Chambliss	[REDACTED]			chambliss_s@yahoo.com	Finance
3	Brad J. Persons	[REDACTED]			bradpers@msn.com	Finance & Real Estate
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

¹ Board members should have a diversity of professional skills and expertise in areas including education, organizational operations, community development, finance, law and facilities/real estate.



STATE DEPARTMENT OF EDUCATION

CERTIFICATE TYPE
TEACHING CERTIFICATE

NUMBER
A 050444

VALID
Life

This Certificate is issued to **BETHEL ELIZABETH CAGER**

By the Louisiana Department of Education, based upon the following:

Ph.D., OUT-OF-STATE COLLEGE OR UNIVERSITY, 1994
MASTER'S DEGREE PLUS 30 GRADUATE HOURS
M.A., XAVIER UNIVERSITY OF LOUISIANA, 1989
B.A., XAVIER UNIVERSITY OF LOUISIANA, 1987

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

SCHOOL SUPERINTENDENT - 3/23/2001
PRINCIPAL - 7/2/1999
PROVISIONAL PRINCIPAL - 12/5/1996
PARISH OR CITY SCHOOL SUPERVISOR OF INSTRUCTION - 6/4/1993
PROVISIONAL ELEMENTARY SCHOOL PRINCIPAL - 5/26/1992
ELEMENTARY GRADES - 8/25/1987
VALID FOR LIFE FOR CONTINUOUS SERVICE - 4/25/2005

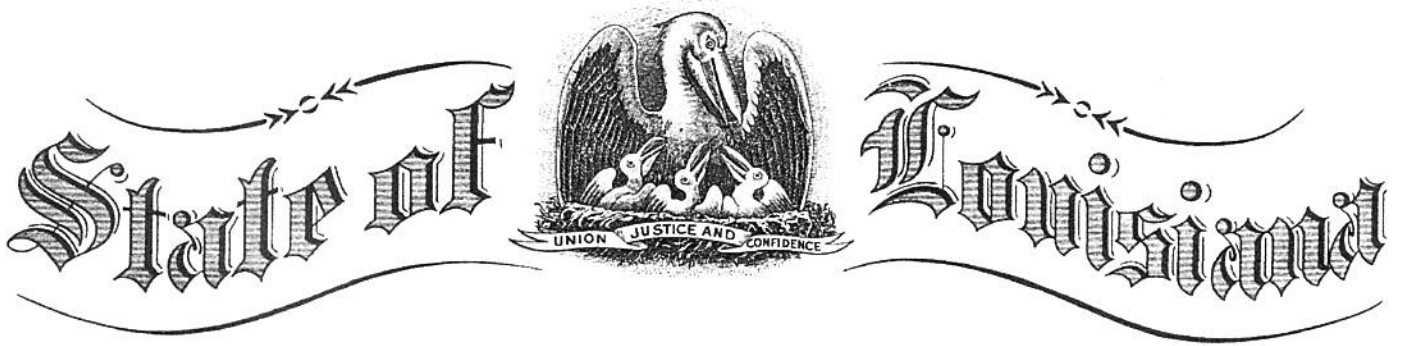
GLENNY LEE BUQUET

President, State Board of
Elementary and Secondary Education

CECIL J. PICARD

State Superintendent of Education

Eligibility: This certificate authorizes the employment of the holder to teach only those subjects and/or engage in other services specified on the permit.



STATE DEPARTMENT OF EDUCATION

Certificate Type
TEACHING CERTIFICATE

NUMBER
LEVEL 3 583157

VALID
04/17/2018 - 04/17/2023

Certificate Issued To:

MONIQUE JAVON HANDY COLIN

By the Louisiana Department of Education, based upon the following:

B.S., LOUISIANA STATE UNIVERSITY, 2006

COMPLETED ALTERNATIVE TEACHER EDUCATION PROGRAM, XAVIER UNIVERSITY OF LOUISIANA, 2011

M.A., XAVIER UNIVERSITY OF LOUISIANA, 2013

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

MILD/MODERATE (1-12), 07/12/2011

For renewal of this certificate, individuals must successfully meet the standards of effectiveness for at least three years during the five-year initial or renewal period pursuant to Bulletin 130 and mandated by Act 54.

, 04/17/2018

Dr. Gary Jones

John White



STATE DEPARTMENT OF EDUCATION

Certificate Type
EDUCATIONAL LEADER LEVEL 1

NUMBER
EDL 1 583158

VALID
04/17/2018 - 04/17/2021

Certificate Issued To:

MONIQUE JAVON HANDY COLIN

By the Louisiana Department of Education, based upon the following:

B.S., LOUISIANA STATE UNIVERSITY, 2006

COMPLETED ALTERNATIVE TEACHER EDUCATION PROGRAM, XAVIER UNIVERSITY OF LOUISIANA, 2011

M.A., XAVIER UNIVERSITY OF LOUISIANA, 2013

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

To receive an EDL 2 certificate, individuals must successfully meet the standards of effectiveness for three years pursuant to Bulletin 130 and mandated by Act 54., 04/17/2018

EDUCATIONAL LEADER LEVEL 1, 04/17/2018

Dr. Gary Jones

John White



STATE DEPARTMENT OF EDUCATION

Certificate Type
TEACHING CERTIFICATE

NUMBER
A 051055

VALID
Life

Certificate Issued To:

LEILA MARY JACOBS EAMES

By the Louisiana Department of Education, based upon the following:

B.A., SOUTHERN UNIVERSITY, 1970

M.ED., SOUTHERN UNIVERSITY, 1974

MASTER'S DEGREE PLUS 30 GRADUATE HOURS

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

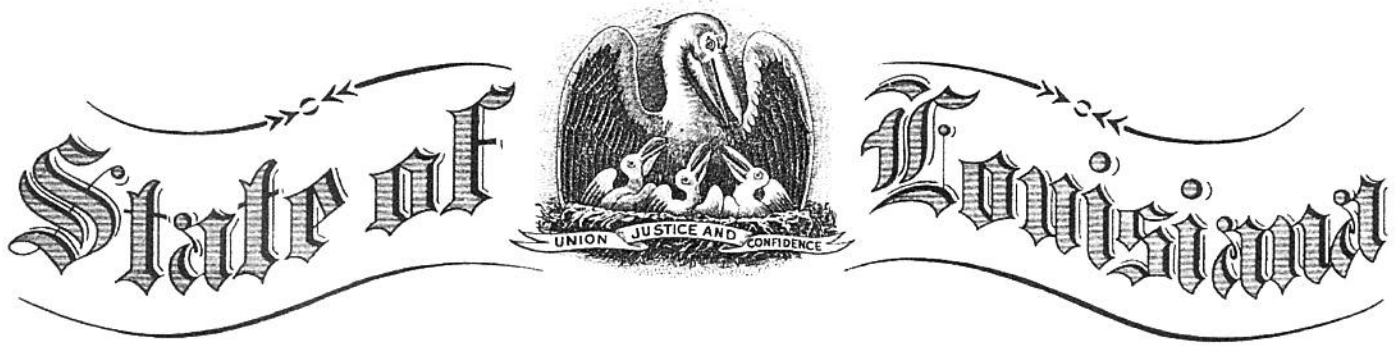
ELEMENTARY GRADES 1-8

PARISH/CITY SCHOOL SUPERVISOR OF INSTRUCTION, 10/30/1992

PIP 6, 1988

Dr. Gary Jones

John White



STATE DEPARTMENT OF EDUCATION

Certificate Type
ANCILLARY CERTIFICATE

NUMBER
AN 004743

VALID
Life

Certificate Issued To:

DONALDO RICARDO BATISTE

By the Louisiana Department of Education, based upon the following:

B.A., NICHOLLS STATE UNIVERSITY, 1975

M.ED., SOUTHEASTERN LOUISIANA UNIVERSITY, 1979

MASTER'S DEGREE PLUS 30 GRADUATE HOURS

Ph.D., UNIVERSITY OF NEW ORLEANS, 1993

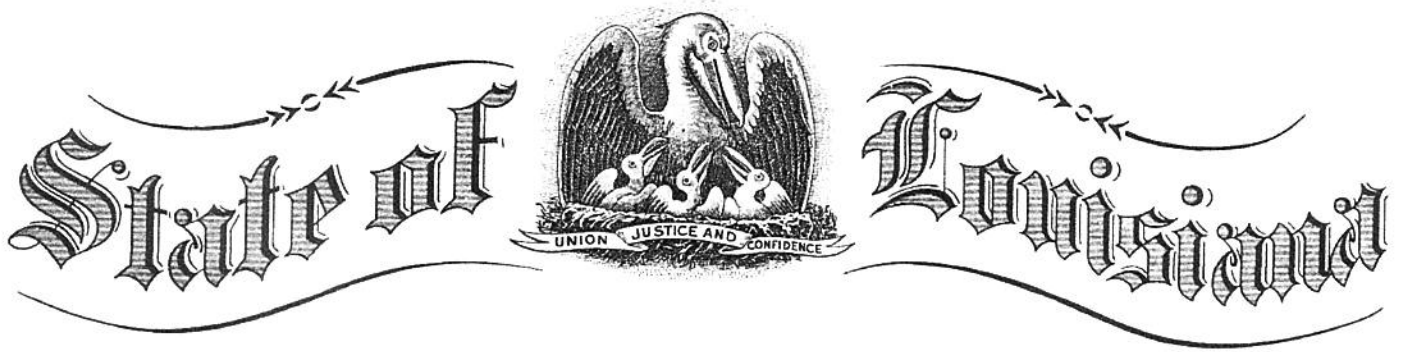
ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

VALID FOR LIFE, 07/09/1997

LEVEL A - PROGRAM EVALUATOR

Dr. Gary Jones

John White



STATE DEPARTMENT OF EDUCATION

Certificate Type
TEACHING CERTIFICATE

NUMBER
A 038035

VALID
Life

Certificate Issued To:

DONALDO RICARDO BATISTE

By the Louisiana Department of Education, based upon the following:

B.A., NICHOLLS STATE UNIVERSITY, 1975

M.ED., SOUTHEASTERN LOUISIANA UNIVERSITY, 1979

MASTER'S DEGREE PLUS 30 GRADUATE HOURS

Ph.D., UNIVERSITY OF NEW ORLEANS, 1993

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

SPEECH AND HEARING THERAPY

SPEECH 6-12

PRINCIPAL, 05/25/1979

SUPERVISOR OF STUDENT TEACHING, 05/25/1979

PARISH/CITY SCHOOL SUPERVISOR OF INSTRUCTION, 06/05/1981

SUPERVISOR OF CHILD WELFARE & ATTENDANCE &/OR VISITING TEACHER, 06/05/1981

SCHOOL SUPERINTENDENT, 05/19/1987

PIP 6, 1988

A handwritten signature in cursive script that reads "Gary L. Jones". The letters are fluid and connected, with a prominent loop at the end of the word "Jones".

Dr. Gary Jones

A handwritten signature in cursive script that reads "John White". The signature is elegant and fluid, with a large initial 'J' and a distinct 'W'.

John White

VITA
Donaldo Ricardo Batiste, Ph.D.

E-Mail: drbatiste53@aol.com

PERSONAL:

Date of Birth: January 20, 1953

Health: Excellent

PROFFESIONAL STATUS:

The Nancy O'Neill Endowed Professor of Executive Leadership
Professor of Education and Coordinator
Ed.D. Program in Executive Leadership
University of Holy Cross
New Orleans, LA 70131-7399

ACADEMIC TRAINING:

1990-93

Ph.D., University of New Orleans
New Orleans, LA; Educational Leadership,
Counseling & Foundations; Recipient of
Outstanding Doctoral Student Award for the
1990-1993 cohort, and nominated for
Dissertation of the Year Award.

1978-79

M.Ed., Southeastern Louisiana University,
Hammond, LA; Educational Administration
and Supervision; Graduated with perfect
4.00 grade-point average; ranked first in
graduating class

1972-75

B.A., Nicholls State University, Thibodaux,
LA; Speech Therapy/Speech Education;
Graduated Magna Cum Laude; Finished
five-year curriculum in three years.

DISSERTATION RESEARCH:

Title:

***"AN INVESTIGATION OF THE ROLE OF A
CENTRAL OFFICE IN SCHOOL
RESTRUCTURING: A CASE STUDY OF A
PUBLIC SCHOOL DISTRICT"***

Committee Chair:

Dr. Edward P. St. John, Professor

AREAS OF CERTIFICATION:

State of Illinois, State Teacher Certification Board

Certificate: Administrative
Valid through 06/10/17 K-12

State of Louisiana, Department of Education,

Certificate: Type A: Valid for Life with Continuous Service. No. 038035

Speech and Hearing Therapy, Speech Education, Supervisor of Student Teaching, Principal, Parish or City School Supervisor of Instruction, Supervisor of Child Welfare and Attendance and/or Visiting Teacher, School Superintendent and Level A Program Evaluator

PROFESSIONAL EXPERIENCE (Pre-K-12 Setting):

2006-2016	Waukegan Community Unit School District #60 Waukegan, IL Superintendent of Schools
2004-2006	Waukegan Community Unit School District #60 Waukegan, IL Deputy Superintendent of Schools
1999-2003	Orleans Parish School Board; New Orleans, LA Interim Chief Academic Officer and Executive Director of Curriculum, Instruction and Educational Support Programs
1996-99	Orleans Parish School Board; New Orleans, LA Principal-John McDonogh Senior High School. Recognized as Louisiana State High School Principal of the Year (1998)
1982-96	Orleans Parish School Board; New Orleans, LA Principal-Wm. C.C. Claiborne Fundamental Magnet (renamed Parkview Magnet School-1995)
1981-82	Orleans Parish School Board; New Orleans, LA Assistant Principal-Thomas Edison Elementary

Donaldo R. Batiste, Ph.D.
VITA; Page 3., Continued

1977-81 Orleans Parish School Board; New Orleans, LA
Speech Pathologist-McDonogh 42 Elementary

1976-77 Terrebonne Parish School Board; Houma, LA
Speech Therapist (.5 year)
Algebra & English Teacher-Oaklawn Junior High (.5 year)

PROFESSIONAL EXPERIENCE (Higher Education Setting):

2016-Present University of Holy Cross
New Orleans, LA
Professor of Education, Coordinator of Ed.D. Program in Executive Leadership

2013 Aurora University
Graduate School – Adjunct Professor

1995-1999 University of New Orleans
Graduate School of Educational Leadership
Adjunct Professor (Fall, Spring and Summer Semesters)

1990-1991 Xavier University of Louisiana
Division of Education-Elementary & Secondary Education
Full-Time Visiting Professor

1984-87 Xavier University of Louisiana
Graduate School-Educational Administration
Adjunct Professor

1980-83 Delgado Community College-Westbank Campus
Coordinator of English-as-Second-Language

1979 Southern University at New Orleans
Adjunct Speech Instructor
(Summer and Fall Semesters)

HONORS:

Nicholls State University Honor Society (Member)
Phi Eta Sigma Young Men Honor Fraternity (Vice-President)
Kappa Delta Pi Education Honor Society (Member)
Phi Kappa Phi Honor Society (Member)
Phi Delta Kappa (Member)
Louisiana State Board of Education Full Scholarship (Recipient)
Teacher of the Year (1979, 1981)
District Principal of the Year (1986, 1988, 1990, 1995, 1997)

State of Louisiana High School Principal of the Year (1998)
LTIP/LTEP-STAR Assessment Program Model Evaluator (Assistant Trainer)

Donaldo R. Batiste, Ph.D.

VITA; Page 4., Continued

Effective Schools Training Project (Superintendent's Designee)
Participant on Superintendent's Leadership Team (1984,85,87,1991-94)
Outstanding Doctoral Graduate of University of New Orleans (1994 and 1999)
Outstanding Alumnus Award – Nicholls State University (2003)
Illinois State Board of Education "Those Who Excel" Award Recipient (2010)
Lake County Superintendent of the Year (2012-2013)
Recipient of Whitney M. Young Northeast Illinois Council of Boy Scouts Award (2014)
Paul Harris Fellow Award Recipient (2017)

PROFESSIONAL AFFILIATIONS:

National Association of Federal Program Administrators (Member)
National Association of Black & Latino School Executives (Member)
Association for Supervision and Curriculum Development (Member)
Louisiana Association of School Executives (Member)
Accelerated School Research Forum (Member)
American Association of School Administrators (Member)
Large Unit District Association (LUDA) (Board of Directors)
Lake County Superintendents' Association (Past President)
Louisiana Retired Teachers Association (Member)
Illinois Retired Teachers Association (Member)

COMMUNITY SERVICE /BOARD REPRESENTATION: (Past and Current)

Institute of Mental Hygiene for Greater New Orleans (Board of Directors)
Healthy Lifestyles Choices (Board of Directors)
The School Leadership Center (Board of Directors)
University of New Orleans Alumni Board (Member)
University of New Orleans Community Board of Advisors (Advisor)
Lake County Technology Campus Board of Control (Board Member)
Waukegan Rotary Club (Past President, Board of Directors, Member)
Rotary Club of New Orleans-Riverbend (Member)
Waukegan City Club (Member)
Little Fort Lions Club (Member)
Education League of Illinois (Member)
Our Lady of Guadalupe Catholic Church (Parish Council Vice-President)
Lakewood Estates Homeowners Association (Board of Directors)
International High School of New Orleans Charter School (Board of Directors)

Donaldo R. Batiste, Ph.D.
VITA; Page 5., Continued

Also Worth Noting*

SCHOLARLY PAPERS AND PRESENTATIONS

Batiste, Donaldo R.; Trahan, Barbara B. (1996, February). "An Analysis of Auditory Comprehension of Linguistic Structures in Pre-School-Aged Children: A paper presented at the Lafourche Communication Disorders Forum

Batiste, Donaldo R.; Belkis, Betty (1997, October). "Assessing Dialectical Variations in Spoken and Written Language." A paper presented at the Xavier University and New Orleans Public Schools Collaborative Symposium, New Orleans, LA

Batiste, Donaldo R.; Dumas, Anita P., (et. al). (1988, April). "School Improvement and Change: Making It Happen." A paper presented at the Louisiana Association for Supervision and Curriculum Development Conference, New Orleans, LA

Batiste, Donaldo R.; Moffett, Randy; Wimpelberg, Robert K. (1992, October). "Personnel Management and District Level Challenges of the Nineties.: A panel discussion presented at the Louisiana Council of Professors of Educational Administration Fall Conference, Baton Rouge, LA

Batiste, Donaldo R.; Eason, Sandra; St. John, Edward P.; (et. al). (1993, January). "Power, Restructuring and the Central Office: A Critical Review". A symposium presented at the Sixteenth Annual Meeting of the Southwest Educational Research Association, Austin, TX

Batiste, Donaldo R.; Bogotch, Ira (1996, January). "The Changing Role of the Central Office in School Restructuring: A Case Study of a Public School District." A paper presented at the Southwest Educational Research Association Spring Conference, New Orleans, LA

MAJOR ACCOMPLISHMENTS DURING SUPERINTENDENCY

As the Deputy Superintendent in charge of Curriculum, Instruction and Professional Development and throughout his tenure as Superintendent of Schools, all schools experienced incremental annual increases in student performance as measured by Annual Yearly Progress on State Assessments

Annually, graduates receive 9.5-10M in scholarships

Multiple Gates Scholars named since 2010

National Social Studies Teacher of the Year named from Waukegan High School (2012)

Maintained healthy fiscal fund balances throughout tenure

Recipient of Meritorious Budget Awards (2010, 2011, 2013, 2014, 2015)

Recipient of Government Finance Awards (2012, 2013, 2014, 2015)

Donaldo R. Batiste, Ph.D.
VITA., Page 6., Continued

Recipient of Distinguished Comprehensive Budget Award (2007,2008,2009,2010, 2011, 2012, 2013,2014)

Received *Capital Development Board* Grant for (\$38M); funds were used for additional classrooms at 12 schools.

Successfully developed, implemented and transitioned the District to Neighborhood Schools; thereby, reducing spending on transportation costs by \$6 million annually since 2008 to present day.

Acquired two (2) federal properties through competitive bidding and application processes; making *Pre-School for All* a reality in District 60.

Acquired *Readiness and Emergency Management Systems (REMS)* Grant. This grant resulted in state-of-the-art Crisis Planning for District.

Recipient of an *Emergency Management Association (IEMA)* Grant for (\$250K).

Successfully compartmentalized a comprehensive high school located on two campuses into 9 Smaller Learning Centers reducing out of school disciplinary outcomes, improving attendance and graduate rates

Our credit rating witnessed a two-level jump to A, despite fact it was accomplished and maintained while the country was suffering through its worst recession in 70 years

Successfully launched our 1:1 technology initiative at the high school serving over 6000 students

Launched and piloted a full-day kindergarten program in 6 of our 15 elementary schools, with plans to go District wide in Fall, 2016

STEPHANIE CHAMBLISS

Email: chambliss_s@yahoo.com

EDUCATION M.B.A. Jesse H. Jones School of Business, Texas Southern University, Houston, TX 2007
B.S. Accounting, EJ Ourso School of Business, Louisiana State University, Baton Rouge, LA 2005

Professional Qualifications:

- Certified Public Accountant – Candidate (2010)
- Attained Series 7 Financial Certification
- Attained Series 63 Financial Certification
- Attained Series 65 Financial Certification
- Obtained Louisiana Life and Health Licensure
- Fulfilled 9 credit hours at *Louisiana State University's Center for Internal Audit*, the nation's top program

PROFESSIONAL

AXA Advisors, New Orleans, LA

October 2013 - Present

FINANCIAL PROFESSIONAL

Help families make educated decisions about life insurance and investments. Assist clients with preparation for retirement and building long-term strategies. Establish 401(K), 403(B), and 457(B) plans for small businesses and governmental entities. Buy and Sell stocks on the New York Stock Exchange. Partner with other professionals (i.e. attorneys) to assist with estate planning needs.

Stephanie Chambliss, New Orleans, LA

July 2012 - Present

INDEPENDENT ACCOUNTANT

Prepare, review & ensure payroll is processed timely and accurately. Prepare annual organization budget. Invoice vendors. Review all invoices for appropriate documentation and approval prior to payment. Code and input all vendor invoices into the uniform accounting system and prepare weekly vendor payments timely. Respond to all vendor inquiries. Perform account reconciliations. Record deposit activity. Post Journal Entries for month-end Account Payables and Account Receivables areas. Ensure vendor payments are posted to the correct budget line item. Distribute W-2s.

Juvenile Justice Project of Louisiana, New Orleans, LA

July 2012 – January 2013

FINANCE & OPERATIONS MANAGER

Prepared financial grant reports. Prepared annual organization budget. Invoiced partner agencies for monthly overhead expenses. Prepared, reviewed & ensured payroll is processed timely and accurately. Reviewed all invoices for appropriate documentation and approval prior to payment. Coded and inputted all vendor invoices into the uniform accounting system and prepare weekly vendor payments timely. Responded to all vendor inquiries. Performed account reconciliations. Recorded deposit activity. Posted Journal Entries for month-end Account Payables and Account Receivables areas. Ensured vendor payments are posted to the correct budget line item. Distributed W-2s. Acted as liaison between external auditor and Board of Directors. Maintained employee files and oversaw related insurance needs. Assisted internal customers (employees) with all HR issues.

Urban League of Greater New Orleans, New Orleans, LA

January 2009 – July 2012

ACCOUNTANT / HUMAN RESOURCE LIAISON

Prepared, reviewed & ensured payroll was processed timely and accurately. Reviewed all invoices for appropriate documentation and approval prior to payment. Coded and inputted all vendor invoices into the uniform accounting system and prepare weekly vendor payments timely. Responded to all vendor inquiries. Performed account reconciliations. Recorded deposit activity. Posted Journal Entries for month-end Account Payables areas. Ensured 1099 maintenance and annual processing. Distributed W-2s. Participated in annual external audit. Maintained employee files and oversee related insurance needs. Assisted internal customers (employees) with all HR issues.

Harrah's Casino, New Orleans, LA

June 2007 – December 2008

SENIOR ACCOUNTANT

Managed \$4.6 million dollar Capital budget. Reviewed and approved outstanding Accounts Payable invoices. Reviewed and approved purchase requisitions and purchase orders. Built contract database. Assisted with preparation of monthly Financial Statements. Assisted in budget and forecast design. Prepared and reviewed monthly account reconciliations. Conducted monthly inventory counts. Periodically met with department heads to discuss individual departmental issues and/or upcoming projects. Prepared corporate quarterly reports. Reviewed and reconciled daily credit card statements. Posted journal entries (accruals) using AS400. Assisted with preparation for month-end and year-end close. Assessed internal controls through risk assessment and SOX 404 reviews. Attended Profit & Loss meetings.

Martin, Jones, & Roberts, LLP Houston, TX
TAX CONSULTANT

January 2007 – May 2007

Prepared Individual, Partnership, and S-Corporation tax returns using ProSystems. Prepared Compilations for small businesses. Met with clients to discuss tax matters. Researched tax rules. Prepared work papers.

Houston Stafford Electric Houston, TX (Contractor for Accountemps)
ACCOUNTANT

July 2006 – January 2007

Prepared and reconciled company bank statements. Prepared monthly Sales and Use Tax Returns. Verified the accuracy of information transmitted to the financial reporting system. [Forefront] Verified W-9 accuracy to reduce IRS fees and penalties assessed against the organization. Scrutinized unbalanced asset, liability and expense accounts. Paid property taxes for 25 Divisional locations. Researched and corrected account discrepancies.

Unity National Bank, Houston, TX
ACCOUNTANT

October 2005 – July 2006

Performed daily cash and suspense transactions reconciliations; executed proof deposit and general ledger corrections. Posted federal funds and securities / bonds investments. Reconciled various official checks. Prepared journal entries and created / managed Excel spreadsheet calculations. Monitored and maintained sensitive documentation.

Key Accomplishments:

- Created and implemented a teller scheduling matrix that improved the scheduling process by 100%.
- Designed a spreadsheet to calculate interest due from multiple CD time deposits resulting in the recovery of over \$15,000.

INTERNSHIP

Lennar Corporation, Houston, TX
INTERNAL AUDIT INTERN

Summer 2004

Performed and documented internal audit procedures for the second largest homebuilder in the United States. Performed audits nationwide within several company divisions as a member of a team of three Auditors. Reviewed departmental segregation of duties chart and interviewed Accounting Clerks to verify proper execution of assigned tasks. Reviewed signatures for correctness and authentication. Examined home closing files for accuracy as per company guidelines. Prepared and initialed audit work papers detailing review process and findings. Attended Exit Conferences.

HONORS / ORGANIZATIONS

AXA Advisors, 2015 Life Application Leader of the Year

AXA Advisors, 2014 Life Application Leader of the Year

AXA Advisors, 2013 "A" Class Advisor of the Year

AXA Advisors, 2013 "DSF" Leader of the Year

YMCA Educational Services, 2012 Annual Campaign Chair, 2009 Gala Fundraising Chair

National Coalition of 100 Black Women of GNO Chapter, VP of Fundraising 2011-2012, Economic Development Chair 2015, Financial Secretary 2016-2018

Alpha Kappa Alpha Sorority, Inc., Economic Security Committee Chair 2011-2012, Graduate Advisor 2013-2014, Assistant Financial Secretary 2015-2016

2011 Bryan Bell Metropolitan Leadership Fellow

REFERENCES AVAILABLE UPON REQUEST

BRAD J. PERSONS

bradpers@msn.com

LinkedIn: [brad-persons-79175753](#)

ACCOUNTANT

Broad accounting knowledge and experience, including accounts payable, inventory control, general ledger, and month-end closing. Collaborate effectively with internal and external partners, building trusted relationships through open, clear communication. Solid analytical skills and attention to detail. Excellent organizational and interpersonal skills. Ability to multi-task and prioritize work assignments.

MS Office | Concur | PeopleSoft | QuickBooks | Quicken

PROFESSIONAL EXPERIENCE

THE TIMES PICAYUNE DOLL & TOY FUND, New Orleans, LA (Periodic; part-time) **2016 – 2018**
Accountant

- Analyze and record payments and receipts (Donations) for the non-profit organization. Reconciled bank account, and produced reports for management board for analysis and tax return.

SELF-EMPLOYED - Real Estate , New Orleans, LA (Part-time) **2016 – 2018**
Accountant, Property Manager

- Manage 3 rental buildings personal- and family-owned in New Orleans. Maintained accounting records, oversee rentals, renovation and maintenance.

ADVANCE CENTRAL SERVICES-LOUISIANA (The Times Picayune), Metairie, LA **2006 – 2016**
Accounting Lead

- Posted and reconciled daily General Ledger bank activity items, including lockbox and credit card settlement deposits, checks, and miscellaneous payments, reviewing for accuracy and completeness.
- Downloaded deposit lockbox activity, categorizing by fund source and payment purpose and facilitating analysis.
- Reviewed credit card chargebacks and bank NSF items for proper disposition.
- Authorized as sole purchaser of large-value items (up to \$100K) using company-issued credit card.
- Reviewed and approved accounts payable bills, enabling prompt payments by verifying correct coding and approvals in PeopleSoft. Respond to inquiries from vendors regarding invoice payment,
- Assisted company employees with use of employee expense and travel reimbursement system (Concur) and answered questions regarding accounting classification of item.
- Tracked weekly inventory shipments and receipts and performed monthly inventory count, ensuring sufficient stock on hand and reducing excess. Completed monthly journal entries to record purchases, consumption and adjustments.

- Analyzed and recorded donations, reviewed and recorded purchase orders, issued payments, reconciled bank accounts, and created custom reports using Quicken, as part of full accounting for Times Picayune Doll and Toy Fund non-profit.
- Monitored postage meter usage, loaded new postage, and recorded monthly usage.

JEMRO, INC., Gretna, LA

2001 – 2006

And other Robert J. McCall companies, Robert Half of Louisiana and Accountemps

Controller

Performed full charge accounting functions for 5 companies. Maintained and reconciled 11 Bank Accounts. Served as office manager and personal assistant to owner.

- Performed all payroll functions for 5+ employees; initiated tax payments using Electronic Federal Tax Payment System (EFTPS).
- Provided accounting for owner's 50+ rental units by recording rent deposits and expenses to General Ledger, maintaining depreciation schedules, and providing data for CPA-prepared tax return.
- Converted computerized accounting system from DOS Peachtree to Quickbooks, modernizing accounting process and increasing efficiency.

ADDITIONAL RELATED EXPERIENCE

Accountant, SAMUEL E. SCHUDMAK, III AND RELATED COMPANIES, LaPlace, LA

Real Estate Manager, FAMILY-OWNED RENTAL PROPERTIES, New Orleans, LA

Accountant, THE CAREY WINSTON COMPANY, Chevy Chase, MD

Financial Accountant, TEXACO, INC., New Orleans, LA

EDUCATION

Bachelor of Science, Accounting, Southeastern Louisiana University, Hammond, LA, GPA: 3.109

- Honors and Activities:
 - Dean's List
 - Accounting Association
 - Honors Dormitory President