



Non-Infrastructure TA Set-Aside Safe Routes to  
School Application for  
FFY 2021 & 2022  
Support Activity Project(s)

SRTS Program Manager for Charter K-8 Schools

CITY OF SURPRISE

**APPLICATIONS ARE DUE VIA E-MAIL TO [srts@azmag.gov](mailto:srts@azmag.gov) BY  
10:00 a.m. Monday, September 25, 2017**

CITY OF SURPRISE:SRTS Program Manager for Charter K-8 Schools

**PART A - MAG MEMBER AND LOCAL AGENCY CONTACT INFORMATION**

**1. MAG Member Agency Contact Information (applicant):**

Select your Agency Name from the drop down box below and manually enter the Contact Name, Phone Number, E-mail and Mailing Address in the fields provided below. (See *Note* below)

MAG Member Agency	Surprise
Contact Name	Martin Lucero
Phone Number	623-222-3142
E-Mail Address	<a href="mailto:martin.lucero@surpriseaz.gov">martin.lucero@surpriseaz.gov</a>
Mailing Address	16000 N. Civic Center Plaza, Surprise AZ 85379

**2. Endorsing Local Agency Contact Information:**

**All project applications must be endorsed by the appropriate Local Agency staff for each project/school location (See *Note* below). Please select the Local Agency below and obtain their signature(s) to complete Part F.** Please select up to four (4) Local Agency (endorsing agency) name(s) by selecting from the drop down box provided next to "Local Agency". Once the Local Agency is selected, the appropriate contact information will automatically populate based on your selection. Contact Margaret Boone at MAG if more that four Local Agencies will be endorsing the project application at [MBoone@azmag.gov](mailto:MBoone@azmag.gov).

Local Agency Contact #1	Local Agency:	Surprise
	Contact Name:	Martin Lucero
	Phone Number:	(623) 222-3142
	E-mail Address:	<a href="mailto:martin.lucero@surpriseaz.gov">martin.lucero@surpriseaz.gov</a>
Local Agency Contact #2	Local Agency:	
	Contact Name:	
	Phone Number:	
	E-mail Address:	
Local Agency Contact #3	Local Agency:	
	Contact Name:	
	Phone Number:	
	E-mail Address:	
Local Agency Contact #4	Local Agency:	
	Contact Name:	
	Phone Number:	
	E-mail Address:	

*Note : If a Local Agency is submitting the application as the Sponsoring MAG Member Agency and there are no other Local Agency partners included in your project(s), Only Section 1 of Part A requires completion. Some project(s) may include one or more Local Agency partners. In this case, please select the Local Agency partner(s) for your project(s).*

**PART B - PROJECT INFORMATION**

The purpose of Part B is to provide sufficient information to evaluate the program and to provide assurance that the program will be capable of meeting the ADOT administered federal clearance and implementation process. This process requires an abbreviated environmental clearance process prior to FHWA authorization letter to encumber federal funding for implementation. Part B Sections 3-6 will demonstrate the proposed project(s) alignment with national SRTS project criteria with known success based on the NHTSA SRTS document referenced at <http://www.nhtsa.gov/people/injury/pedbimot/bike/Safe-Routes-2002/overview.html#12>. The application, once completed, will also demonstrate compliance with the MAG TA Set-Aside Non-infrastructure SRTS goals and objectives which are aligned with guidance for the Fixing America's Surface Transportation (FAST) Act and SAFETEA-LU Section 1404 for SRTS referenced at: [http://www.fhwa.dot.gov/environment/safe\\_routes\\_to\\_school/guidance/](http://www.fhwa.dot.gov/environment/safe_routes_to_school/guidance/). (Live links for both of these references are provided outside the print area of this row in the Excel form)

**1. Project Development Determination:**

Does the school(s) or school district(s) have policies that prohibit students from biking or walking to school, or that mandate busing? If the answer to this question is "YES" and a process to change these policies cannot be completed prior to September 29, 2016 this project cannot qualify for funding through the MAG TA Non-infrastructure SRTS program.

YES  NO

If "Yes", please explain any plans currently underway to change these policies, including a timeline and deadline for achieving this:

N/A

**2. Project Programming Timeframe:**

Are you applying for a multi-year project?  YES  NO

If yes, check the appropriate boxes for each year of this funding:  FFY 2021  FFY 2022

**3. School Profile(s):** (Maximum Evaluation Points: 5) If you are including more than four (4) schools, "unhide" rows 29-82. (Type in school name and use drop down boxes provided for the other information to the right of the school name.)

Please provide the school name(s):	Title 1? (Yes/No)	# of Students Enrolled	Estimated # Currently Walking/Biking	*Public or Non-Profit (Yes/No)
Arizona Charter Academy	Yes	850	150	Yes
Imagine Prep Surprise	Yes	727	130	Yes
Imagine Rosefield School	Yes	800	50	Yes
Legacy Traditional School Surprise	Yes	1,900	200	Yes
Calibre Academy Surprise	No	500	100	Yes

\*Is this a public or other school funded through a nonprofit organization? (Yes/No) - if "Yes" see Part D, Required Attachments for charter and other non-public schools that are not for profit. If "No", proposed projects at this school are not eligible for funding through the MAG TA Non-infrastructure SRTS program.

**PART B - PROJECT INFORMATION**

**4. Five E's:** (Maximum Evaluation Points: 25) The proposal should demonstrate how the project(s) address the 5 E's (Engineering, Enforcement, Education, Encouragement, and Evaluation). The proposed project(s) may not themselves address all five E's (e.g. Engineering). However, if the proposal documents other on-going efforts that focus on the 5 E's that are not covered by the proposal, those efforts can be counted as qualified E's. Please indicate "Yes" or "No" next to each "E" using the drop down box provided. Provide (type in) a brief two line description of how the project(s) address the associated E in the space provided to the right.

<b>Engineering</b>	Yes	The SRTS Program Manager will work with the City Traffic Engineer and schools to identify and improve/repair crosswalks, sidewalks, bike lanes, signage, flashing beacons, and another ped/bike facilities.
<b>Enforcement</b>	Yes	The SRTS Program Manager will work with the Surprise Police Department to increase compliance with traffic laws, and reinforce safe behaviors around the schools. Ensure crossing guards have the proper training and safety equipment.
<b>Education</b>	Yes	The SRTS Program Manager will work with school staff and city staff to design and conduct training sessions to teach students how to be safe walkers and bicyclists, rules of the road, etc. Pamphlets and safety items may be distributed.
<b>Encouragement</b>	Yes	The SRTS Program Manager will work with school staff and City staff to design and conduct encouragement activities such as Walking School Bus, Ped/Bike Safety Awareness Campaigns, participation in International Walk to School Day, holding competitions and contests, and distributing encouragement prizes.
<b>Evaluation</b>	Yes	The SRTS Program Manager will work with City staff to conduct periodic Student Travel Tally, Parent Survey, and walkability audits to gauge the effectiveness of various SRTS programs in terms of numbers of walkers, bicyclists, and parent participation.

**PART B - PROJECT INFORMATION (CONT'D)**

The purpose of Part B is to provide sufficient information to evaluate the program and to provide assurance that the program will be capable of meeting the ADOT administered federal clearance and implementation process. This process requires an abbreviated environmental clearance process prior to FHWA authorization letter to encumber federal funding for implementation. Part B Sections 3-6 will demonstrate the proposed project(s) alignment with national SRTS project criteria with known success based on the NHTSA SRTS document referenced at <http://www.nhtsa.gov/people/injury/pedbimot/bike/Safe-Routes-2002/overview.html#12>. The application, once completed, will also demonstrate compliance with the MAG TA Set-Aside Non-infrastructure SRTS goals and objectives which are aligned with guidance for the Fixing America's Surface Transportation (FAST) Act and SAFETEA-LU Section 1404 for SRTS referenced at: [http://www.fhwa.dot.gov/environment/safe\\_routes\\_to\\_school/guidance/](http://www.fhwa.dot.gov/environment/safe_routes_to_school/guidance/). (Live links for both of these references are provided outside the print area of this row in the Excel form)

**5. Sustainability:** (Maximum Evaluation Points: 30) The proposal should demonstrate how the planned project(s) can be continued into the future. Please use the drop down boxes to indicate how many of the suggested strategies to promote the project into the future will be implemented as part of your project(s). Be sure to select unique entries for each field provided below (duplicates will not be counted). The sixth field is provided to add (type in) unique strategies to be implemented as part of this project.

Meet with the principal and teachers at the beginning of the year to plan in-classroom activities for the year.

Hold regular SR2S team meetings at a time when most interested people can attend.

Notify parents by including information about the program in the parent packages that are mailed home at the start of the school year.

Hold neighborhood coffees to encourage parents to form "Walking School Buses," "Bike Trains," and carpools.

Hold end of year event to celebrate successes and strategize for the following year

Meet with all SRTS stakeholders, ie: school staff, parents, City staff, police officers, community leaders, periodically to discuss effectiveness of SRTS programs and areas of improvement.

**6. SRTS Strategies:** (Maximum Evaluation Points: 40) The proposed project(s) should demonstrate the likely effectiveness of planned SRTS strategies. The following section will indicate the number of known effective SRTS strategies (Stakeholders identified, Events, Escort Programs) to be implemented with the proposed project(s).

**Stakeholders:**

a. How many of the following Stakeholders have been identified or will be identified as part of this project? Please indicate a number next to each type of stakeholder. (enter a number in the field provided, leave blank for "0")

Parents  Students  Teachers  Neighbors  School Staff  City Staff   
County Staff  Elected Officials  Businesses  Community Groups  Law Enforcement  Crossing Guards

b. Does your project include the development of or an existing partnership agreement between stakeholders? (Yes/No)

**Events:**

c. How many of the following events are planned as part of the proposed project? (Enter a number in the field provided to the right, leave blank for "0")

Walk/Bike to School Day   
International Walk to School Day   
Walk/Bike Safety Assemblies   
Walk/Bike Safety Education Booths

d. How often are these events planned?  
(Select Weekly, Monthly, Quarterly, Annually  
from the drop down box provided below)

Annually  
Annually  
Quarterly  
Quarterly

**Escort Programs:**

e. How many of the following Escort Programs are planned as part of the proposed project(s):  
(Enter a number in the field provided, leave blank for '0')

Walking School Bus

Bike Trains

**Other:** f. Are Parent Surveys included as part of the proposed project(s) or do they exist as baseline information?  
(Select 'Yes' or 'No' in the drop down box provided)

CITY OF SURPRISE:SRTS Program Manager for Charter K-8 Schools

**PART C - NON-INFRASTRUCTURE SAFE ROUTES TO SCHOOL COST ESTIMATE FORM**

Please provide a detailed cost estimate for this program. See FHWA TA Non-Infrastructure guidance at the following link [http://www.fhwa.dot.gov/environment/safe\\_routes\\_to\\_school/guidance/](http://www.fhwa.dot.gov/environment/safe_routes_to_school/guidance/) (Live link provided outside the print area of this row in the Excel form)

**Inappropriate Uses of SRTS Funds**

States are not permitted to use Section 1404 funds for projects that do not specifically serve the stated purposes of the SRTS Program, nor should they be used for reoccurring costs except as specifically provided in the legislation. For example, in general, Program funds should not be used to pay crossing guard salaries, as these are reoccurring costs (although funds may be used for crossing guard training programs). Funding requests for costs that are expected to be reoccurring costs in future years should include plans for how the costs will be funded in the future and a rationale for how federal funding of 1-2 years will enable leveraging of future financial security for the activity.

The use of Section 1404 funds for projects that reorganize pick-up and drop-off primarily for the convenience of drivers rather than to improve child safety and/or walking and bicycling access is not permitted, nor should Program funds be spent on education programs that are primarily focused on bus safety. Improvements to bus stops are not eligible for this funding.

<b>Sponsoring Agency:</b>	CITY OF SURPRISE	<b>Project Title:</b>	SRTS Program Manager for Charter K-8 Schools
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**Project Programming Year: FY2021**

Item Description	Unit	Quan.	Unit Price	Total	Federally Eligible	Federal Funds (94.3%)	Local Funds (5.7%)	Other	Note(s)
City-wide SRTS Program Manager	ea	1	\$50,000.00	\$50,000.00	Yes	\$47,150.00	\$2,850.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
Example: Crossing Guard Salaries				\$0.00	No	\$0.00	\$0.00	\$0.00	This portion paid for by the District
<b>Subtotal of Program Costs FY2021</b>				<b>\$50,000.00</b>		<b>\$47,150.00</b>	<b>\$2,850.00</b>	<b>\$0.00</b>	
<b>ADOT Fee</b>	EA	1	\$ 2,000.00	<b>\$ 2,000.00</b>	Yes	\$1,886.00	\$114.00	\$0.00	
<b>Total Program Cost Including ADOT Fees FY2021</b>				<b>\$52,000.00</b>		<b>\$49,036.00</b>	<b>\$2,964.00</b>	<b>\$0.00</b>	

**Project Programming Year: FY2022**

Item Description	Unit	Quan.	Unit Price	Total	Federally Eligible	Federal Funds (94.3%)	Local Funds (5.7%)	Other	Note(s)
City-wide SRTS Program Manager	ea	1	\$50,000.00	\$50,000.00	Yes	\$47,150.00	\$2,850.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
				\$0.00	Yes	\$0.00	\$0.00		
Example: Crossing Guard Salaries				\$0.00	No	\$0.00	\$0.00	\$0.00	This portion paid for by the District
<b>Subtotal of Program Costs FY2022</b>				<b>\$50,000.00</b>		<b>\$47,150.00</b>	<b>\$2,850.00</b>	<b>\$0.00</b>	
<b>ADOT Fee</b>	EA	1	\$ 2,000.00	<b>\$ 2,000.00</b>	Yes	\$1,886.00	\$114.00	\$0.00	
<b>Total Program Cost Including ADOT Fees FY2022</b>				<b>\$52,000.00</b>		<b>\$49,036.00</b>	<b>\$2,964.00</b>	<b>\$0.00</b>	

CITY OF SURPRISE:SRTS Program Manager for Charter K-8 Schools

**PART D - SIGNATURE(S):**

**As the MAG member agency's official, I hereby certify that this application is accurate and complete, and that the program will be included in the MAG member agency's local budget if the program is selected for federal funding.**

Signature:	
Name:	Lindsey Duncan
Title:	Finance Director
Date:	9/22/2017

**Note: All below signatures indicate an agreement in principle and a partnership on this project between the MAG member agency and the signing organizations. Although not all signatures are required, applications that include more signatures will be ranked higher**

**Endorsing Local Agency Contact Signature (required):**

Signature of contact(s) listed in Section 2 in Part A. Unhide rows 16-30 for more than one Endorsing Local Agency signatures and 37-51 for more than one School Official signature.

Signature:	
Name:	
Title:	
Organization:	
Date:	

**School Official (required):**

Signature:	
Name:	Melissa Holdaway
Title:	Superintendent
Organization:	Arizona Charter Academy
Date:	

Signature:	
Name:	James Mecca
Title:	Principal
Organization:	Imagine Rosefield
Date:	

Signature:	
Name:	Nicole Kirkley
Title:	Principal
Organization:	Legacy Traditional School Surprise
Date:	

**PART D - SIGNATURE(S):**

**As the MAG member agency's official, I hereby certify that this application is accurate and complete, and that the program will be included in the MAG member agency's local budget if the program is selected for federal funding.**

Signature:	
Name:	<del>Bob Wingenroth</del>
Title:	<del>City Manager</del>
Date:	

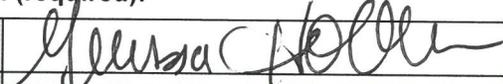
**Note: All below signatures indicate an agreement in principle and a partnership on this project between the MAG member agency and the signing organizations. Although not all signatures are required, applications that include more signatures will be ranked higher**

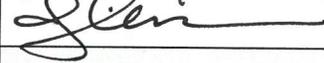
**Endorsing Local Agency Contact Signature (required):**

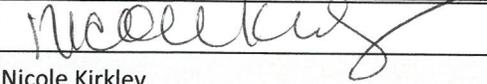
Signature of contact(s) listed in Section 2 in Part A. Unhide rows 16-30 for more than one Endorsing Local Agency signatures and 37-51 for more than one School Official signature.

Signature:	
Name:	
Title:	
Organization:	
Date:	

**School Official (required):**

Signature:	
Name:	Melissa Holdaway
Title:	Superintendent
Organization:	Arizona Charter Academy
Date:	9-20-17

Signature:	
Name:	James Mecca
Title:	Principal
Organization:	Imagine Rosefield
Date:	9.20.17

Signature:	
Name:	Nicole Kirkley
Title:	Principal
Organization:	Legacy Traditional School Surprise
Date:	9.20.17

Signature:	
Name:	Chris McComb
Title:	Principal
Organization:	Imagine Prep Surprise
Date:	
Signature:	<i>Rebecca Venegas</i>
Name:	Rebecca Venegas
Organization:	Calibre Academy
Title:	Principal
Date:	9/20/2017

CITY OF SURPRISE:SRTS Program Manager for Charter K-8 Schools

<b>PART E - Checklist</b>	
<b>This checklist is included to facilitate applicant review and verification that all required fields in the form have been completed. Please select Yes or No from the drop down box provided</b>	
<b>COVER SHEET</b>	<b>Complete?</b>
Cover Sheet is complete with a representative photo, project title and MAG Member Agency Name inserted.	Yes
<b>PART A - Contacts and Program Description Fields</b>	<b>Complete?</b>
1. MAG Member Agency name and contact information completed.	Yes
2. Endorsing Local Agency Contact selected for all local agencies included in the project application and contact information automatically populated.	Yes
<b>PART B - Project Description</b>	<b>Complete?</b>
1. Project Development Determination complete with YES or NO indicated and an explanation provided if the answer is YES.	Yes
2. Project Programming Timeframe completed with indication of YES or NO for a multi-year project and the associated fiscal year the project will be programmed in indicated.	Yes
3. School names provided and each of the four fields; Title 1, # of Students, Estimated # Currently Walking/Biking, and Public or Non-profit completed.	Yes
4. Five E's completed with indication of Yes or No for inclusion as part of the proposed project(s) and description of how each "E" is addressed provided in the manual field provided to the right of each "E".	Yes
5. Sustainability section completed with all the elements included in the project(s) selected and any additional elements provided in the 6th field of Part B Section 4 (if applicable).	Yes
6. SRTS Strategies section completed indicating the number and types of Stakeholders identified, Events and Escort Programs to be included, and indication of Yes or No if Parent Surveys are to be included or exist (a through f).	Yes
<b>PART C - Cost Estimate Worksheet</b>	<b>Complete?</b>
Applicant has read and understands federal eligible cost guidance.	Yes
Sponsoring Agency, Program Title, and Application Date are complete.	Yes
Individual Item Costs are complete and accurate.	Yes
Subtotal Cost is complete and accurate.	Yes
Non federalized Local Match of 5.7% is completed for each line item as well as in the Subtotal and Total fields.	Yes
ADOT fee is \$2000 and is a federally eligible expense.	Yes
Total Cost is complete and accurate and does not exceed \$50,000 for each FY 2021 & 2022.	Yes
<b>PART D - Signatures</b>	<b>Complete?</b>
Form is signed and dated (PDF version) by the MAG member agency's official who will be responsible for allocating budget and signing invoices.	Yes
Name, title and date fields under the signatures are completed (both PDF and excel format).	Yes
Form is signed and dated (PDF version) by each endorsing Local Agency staff.	Yes
Name, title, organization and date fields under the endorsing Local Agency staff signatures are completed.	Yes
Form is signed and dated (PDF version) by each School Official.	Yes
Name, title, organization and date fields under the School Official signatures are completed.	Yes
Additional signatures and dates (PDF version) and related name, title, organization are completed (both PDF and excel).	Yes
<b>PART E - Checklist</b>	<b>Complete?</b>
Entire checklist is completed.	Yes
<b>PART F - Required Attachments</b>	<b>Complete?</b>
Any and all applicable attachments scanned into a PDF and inserted into the complete PDF application file.	Yes

## Part F - Required Attachments

Listed below are the required attachments for this application. Boilerplate support letters will score lower than signer-written or otherwise unique letters. Applications that include projects to be implemented at private or charter schools administrated through a nonprofit entity MUST include a PDF copy of the 501 c (3) documentation held by the school(s) administration.

Please insert required attachment(s) 1 and 2 after Part E in your PDF format application file.

### Required Attachments:

1) Please attach Letters of Support from all project partners. Letters of support should be written by partner agency contact. Signatories should include information on how their organization will be involved.

2) Please attach a copy of the 501 c (3) documentation for each nonprofit private or charter school included in the application.



OFFICE OF MAYOR  
CITY OF SURPRISE  
16000 N. CIVIC CENTER PLAZA  
SURPRISE, AZ 85374  
T. 623-222-1300

September 21, 2017

Ms. Margaret Boone  
Safe Routes to School  
Maricopa Association of Governments  
302 North First Avenue, Suite 300  
Phoenix, AZ 85003

RE: City of Surprise SRTS Non-Infrastructure Transportation Alternatives Application

Dear Ms. Boone;

As Mayor of the City of Surprise, I fully support the City's Non-Infrastructure Transportation Alternatives Safe Routes to School (SRTS) funding request. This application would fund a SRTS Program Manager to coordinate safe routes to school recommendations and activities between city staff, school staff, and community stakeholders for all K-8<sup>th</sup> charter schools in the City.

The City of Surprise is committed to the safety of our children walking and biking to school. The six schools in this application serve almost 6,500 students combined. The completion of the Safe Routes to School Action Plan and the development of walking and biking maps are important tools for parents and children. This SRTS Program Manager will implement the recommendations of the Action Plan, coordinate all SRTS activities among the stakeholders, and encourage more students to choose the healthier option of walking and biking to school. The City of Surprise strives to foster a city-wide culture of safe multimodal transportation.

In addition to ensuring the safety of our students walking and biking to school, Safe Routes to School projects also help minimize traffic congestion and air pollution around schools and reduce overall fuel consumption.

My office looks forward to working with all schools in this application and MAG as a crucial stakeholder in this importation project.

I hope you find this grant application worthy of funding.

Sincerely,

A handwritten signature in black ink that reads "Sharon R. Wolcott".

Mayor Sharon Wolcott  
City of Surprise



**Office of the City Council**  
16000 N. Civic Center Plaza  
Surprise, AZ 85374  
Ph 623-222-1300  
Fax 623-222-1301

September 21, 2017

Margaret Boone  
Safe Routes to School  
Maricopa Association of Governments  
302 north 1<sup>st</sup> Avenue, Suite 300  
Phoenix, Arizona 85

**RE: City of Surprise FFY 2021 & 2022 Safe Routes to School Grant Application**

Dear Ms. Boone,

As the Councilmember for District 4, I am pleased to support the City's Safe Routes to School Non-Infrastructure funding request for a SRTS Program Manager for Charter Schools in the City of Surprise.

The City of Surprise considers the safety of our children walking and biking to school the utmost importance. To that end, a Safe Routes to School Action Plan was completed for Arizona Charter Academy, Imagine Rosefield, and Imagine Prep. An SRTS Support Activities application was funded through MAG last year. This application to fund a program manager/advocate who will coordinate the recommendations of the Action Plan is the logical next step to fully implement a Safe Routes to School program for the aforementioned schools. The charter schools in this grant application are a critical component of the education system in Surprise and combined educates several thousands of Surprise students. Having a person dedicated to the safe travels of these students will help foster a city-wide culture of safe multimodal transportation.

The City looks forward to working with the charter schools, community partners, and law enforcement to create safe pedestrian and biking options for students of all ages and abilities.

Sincerely,

Ken Remley  
Councilmember, District 4  
City of Surprise



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## ARIZONA CHARTER ACADEMY

16011 North Dysart Road • Surprise, Arizona 85374

Phone: 623-974-4959 • Fax: 623-974-4840

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September 21, 2017

Margaret Boone  
Maricopa Association of Governments  
302 North First Avenue, Suite 300  
Phoenix, AZ 85003

Re: SRTS Program Manager for K-8 Charter Schools

Dear Ms. Boone,

I am writing this letter on behalf of the Arizona Charter Academy to confirm our support of the SRTS Program Manager grant for the City of Surprise. We had the pleasure of working with the City of Surprise over the past couple of years on a needs assessment to identify how they could assist in improving safety conditions for our students.

Our students' safety is of utmost importance. This grant would provide much needed resources to improve the awareness of safety options for our students who bike and walk to school.

In an effort to increase physical fitness, we encourage students to walk to school. As such, there is room for improving our local sidewalks and crosswalks which is essential for our students' and parents' safety.

I welcome the opportunity to work with the City of Surprise in this area.

Sincerely,

A handwritten signature in black ink that reads "Melissa Holdaway". The signature is written in a cursive style.

Melissa Holdaway  
Chief Operating Officer



## ***Imagine Rosefield***

12050 N. Bullard Ave  
Surprise, AZ 85379

**Margaret Boone**  
**Maricopa Association of Governments**  
**302 North First Avenue, Suite 300**  
**Phoenix, AZ 85003**

Ms. Boone:

The safety of our students is a priority at Imagine Rosefield. We make every effort to ensure that security measures are in place and enforced on our campus. One area that we cannot control beyond our borders is traffic and pedestrian safety.

Our school does not offer transportation and as such, traffic in and out of the school is a major issue for the school as well as the local community. We do provide crosswalk support, however, the major roads leading to the school are heavily utilized by local traffic and driver speeds are not always within the posted limits.

This combination of parent drop-off and pick-up, combined with heavy local traffic creates a serious issue for those students who may wish to walk or ride a bicycle to school. If these issues are addressed, more students and parents would feel secure in walking or riding to school, thus alleviating the congestion that we experience in the morning during drop off and evening during pick up.

Given this situation, we would gladly support efforts to work with city planners and local police to implement safety measures and design walker and rider friendly access for the local community. In addition, training for students, parents and staff will provide the skills and knowledge necessary to safely use alternate modes of transportation to and from school.

We would happily support the creation of a Safe Routes Program Manager to assist in addressing the issues I have outlined above. Please do not hesitate to contact me should you need additional information.

Respectfully,

A handwritten signature in blue ink, appearing to read 'James Mecca', with a long horizontal line extending to the right.

James Mecca, M.Ed.  
Principal, Imagine Rosefield



# LEGACY

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## TRADITIONAL SCHOOL

Margaret Boone  
Maricopa Association of Governments  
302 North First Avenue, Suite 300  
Phoenix, AZ 85003

Ms. Boone,

Student safety is and remains our priority at Legacy Traditional School. While we have managed to develop a plan within our school borders to keep children safe when walking or biking to school, we remain concerned with pedestrian traffic off site when it is out of our hands.

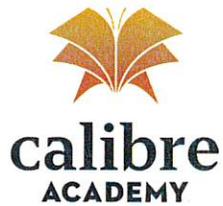
Legacy Traditional School does not offer a bussing or transportation system, therefore we count on the city to help us keep our children safe when walking or biking to and from school. The roads leading to our school are extremely congested and despite the efforts of the police and city, the school zone speed limits are not always followed, making the streets unsafe for our children.

Our concern remains that with extreme congestion and the amount of vehicles driving in and out of our school for drop-off and pick-up that our students are not as safe as they can be when walking or biking in.

We support the city efforts the further implement safety measures to keep the children in our city safe. We hope the Safe Routes Manager position will be approved to address the needs of our community.

Thank you for your consideration,

Nicole Kirkley, M.Ed.  
Principal, Legacy Traditional Schools



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September 20, 2017

To whom it may concern,

I am writing this letter to support the opportunity the City of Surprise is offering to be able to work with the community to create a better environment for the pedestrians and the bicyclist.

I believe this will give our students, parents and staff an opportunity to walk more and to ride their bicycles to school and as an added benefit exercise more.

Thank you for your attention in this matter.

*Rebeca Venegas*

Rebeca Venegas  
Calibre Principal

IRS  
Determination  
Letter

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 21 2001**

SUCCESS SCHOOL  
C/O DR JOHN ATKINSON  
10705 W WEDGEWOOD DR  
SUN CITY, AZ 85351

*c/o*  
**L ARIZONA CHARTER  
ACADEMY**

Employer Identification Number:  
86-1023123  
DLN:  
17053116031021  
Contact Person:  
RENEE RAILEY NORTON ID# 31172  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Form 990 Required:  
Yes  
Addendum Applies:  
Yes

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in sections 509(a)(1) and 170(b)(1)(A)(ii).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. In the case of an amendment to your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, you should inform us of all changes in your name or address.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, if you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958. Additionally, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please contact your key district office.

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the

Letter 947 (DO/CG)

SUCCESS SCHOOL

part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of Code sections 2055, 2106, and 2522.

Contribution deductions are allowable to donors only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

In the heading of this letter we have indicated whether you must file Form 990, Return of Organization Exempt From Income Tax. If Yes is indicated, you are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete, so be sure your return is complete before you file it.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

SUCCESS SCHOOL

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

If we have indicated in the heading of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,



Steven T. Miller  
Director, Exempt Organizations

## ADDENDUM

You are not subject to the specific publishing, reporting, and record-keeping requirements of Revenue Procedure 75-50, 1975-2 C.B. 587, so long as you operate as a charter school. If your method of operations changes to the extent that your charter is terminated, cancelled or not renewed, you should notify us. You will then be required to comply with Revenue Procedure 75-50 to maintain your exempt status as a school described in sections 509(a)(1) and 170(b)(1)(A)(ii) of the Code.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: APR 14 2010

IMAGINE MIDDLE AT SURPRISE INC  
12050 N BULLARD AVE  
SURPRISE, AZ 85379

Employer Identification Number:  
20-4931199  
DLN:  
509342017  
Contact Person:  
JOYCE DARBY ID# 95011  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
August 5, 2008  
Contribution Deductibility:  
Yes  
Addendum Applies:  
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

IMAGINE MIDDLE AT SURPRISE INC

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A handwritten signature in black ink, appearing to read "Robert Choi". The signature is stylized with a large, looped initial "R" and a cursive "C".

Robert Choi  
Director, Exempt Organizations  
Rulings and Agreements

Enclosure: Publication 4221-PC

IMAGINE MIDDLE AT SURPRISE INC

ADDENDUM

You are the holder of a charter from an authorized government entity to operate a school. You have contracted with a management company to provide comprehensive services. If you change your operations and do not contract with a comprehensive management company, you should notify us. You may then be eligible for a school foundation status of IRC 170(b)(1)(A)(ii).

The effective date of exemption under Internal Revenue Code section 501(c)(3) is August 5, 2008, postmark date of your submitted Form 1023 application.

Furthermore, based on your submitted Form 1024 application, your organization qualifies for retroactive exemption under Code section 501(c)(4) from June 3, 2005, date of incorporation to the postmark date of your submitted Form 1023 application. Tax exemption under section 501(c)(4) allows exemption from federal income tax, but generally not deductibility of contributions under Code section 170.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUN 14 2016

LEGACY TRADITIONAL SCHOOL-SURPRISE  
3201 S GILBERT ROAD BLDG A  
CHANDLER, AZ 85286

Employer Identification Number:  
47-2207406  
DLN:  
17053062324046  
Contact Person:  
MS. MALONEY ID# 31210  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(ii)  
Form 990/990-EZ/990-N Required:  
Yes  
Effective Date of Exemption:  
September 24, 2014  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

You're not subject to the specific publishing requirements of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you operate under a contract with the local government. If your method of operation changes to the extent that your charter is terminated, cancelled or not renewed, you should notify us. You'll also be required to comply with Revenue Procedure 75-50.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt

LEGACY TRADITIONAL SCHOOL-SURPRISE

organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

We sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A handwritten signature in black ink, appearing to read "J. Cooper", written in a cursive style.

Jeffrey I. Cooper  
Director, Exempt Organizations  
Rulings and Agreements



DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, D.C. 20224

TAX EXEMPT AND  
GOVERNMENT ENTITIES  
DIVISION

Date: OCT 24 2003

Carden Elementary Charter School, Inc.  
c/o Timothy A. Smith  
4744 West Grovers Avenue  
Glendale, AZ 85038

Employer Identification Number:  
86-1003326  
Issuing Specialist:  
Bruce Lewis, 50-18875  
Toll Free Customer Service:  
877-829-5500  
Accounting Period Ending:  
June 30  
Foundation Status Classification:  
509(a)(1) & 170(b)(1)(A)(ii);  
Form 990 Required:  
Yes

Dear Applicant:

Based on the information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) effective February 27, 2003. You have agreed to this effective date.

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in the section(s) indicated above.

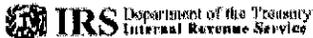
Revenue Procedure 75-50, 1975-2 C.B. 587, sets forth guidelines and recordkeeping requirements for determining whether private schools have racially nondiscriminatory policies as to students. You are excepted from complying with this revenue procedure as long as you operate as a Charter school. Should you no longer operate under the Charter you will have to comply with the revenue procedure to maintain your tax-exempt status.

Please notify the Ohio Tax Exempt and Government Entities (TE/GE) Customer Service office if there is any change in your name, address, sources of support, purposes, or method of operation. If you amend your organizational document or bylaws, please send a copy of the amendment to the Ohio TE/GE Customer Service office. The mailing address for that office is: Internal Revenue Service, TE/GE Customer Service, P.O. Box 2508, Cincinnati, OH 45201.

You are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act.

If you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958 of the Code. In this letter we are not determining whether any of your present or proposed arrangements would be considered an excess benefit transaction resulting in tax under section 4958. Additionally, you are not automatically exempt from other federal excise taxes.

RECEIVED OCT 31 2003



06DEN UT 84201-0046

In reply refer to: 0423256148  
Dec. 26, 2014 LTR 252C 0  
86-1003326 000000 00

00006387  
BDDC: TE

CALIBRE ACADEMY INC  
% TIMOTHY A SMITH  
4744 W GROVERS AVE  
GLENDALE AZ 85308-3453



006674

Taxpayer Identification Number: 86-1003326

Dear Taxpayer:

Thank you for your Form 8868.

We have changed the name on your account as requested. The number shown above is valid for use on all tax documents.

If you need forms, schedules, or publications, you may get them by visiting the IRS website at [www.irs.gov](http://www.irs.gov) or by calling toll-free at 1-800-TAX-FORM (1-800-829-3676).

If you have any questions, please call us toll free at 1-877-829-5500.

If you prefer, you may write to us at the address shown at the top of the first page of this letter.

Whenever you write, please include this letter and, in the spaces below, give us your telephone number with the hours we can reach you. Also, you may want to keep a copy of this letter for your records.

Telephone Number ( ) \_\_\_\_\_ Hours \_\_\_\_\_

Sincerely yours,

Sheila Bronson  
Dept. Manager, Code & Edit/Entity 3

Enclosure(s):  
Copy of this letter

Carden Elementary Charter School, Inc.

Effective February 27, 2003, donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of Code sections 2055, 2106, and 2522.

Donors (including private foundations) may rely on this ruling unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your 509(a) status as indicated above, donors (other than private foundations) may not rely on the classification indicated above if they were in part responsible for, or were aware of, the act that resulted in your loss of such status, or they acquired knowledge that the Internal Revenue Service had given notice that you would be removed from that classification. Private foundations may rely on the classification as long as you were not directly or indirectly controlled by them or by disqualified persons with respect to them. However, private foundations may not rely on the classification indicated above if they acquired knowledge that the Internal Revenue Service had given notice that you would be removed from that classification.

Contribution deductions are allowable to donors only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fund-raising events may not necessarily qualify as fully deductible contributions, depending on the circumstances. If your organization conducts fund-raising events such as benefit dinners, shows, membership drives, etc., where something of value is received in return for payments, you are required to provide a written disclosure statement informing the donor of the fair market value of the specific items or services being provided. To do this you should, in advance of the event, determine the fair market value of the benefit received and state it in your fund-raising materials such as solicitations, tickets, and receipts in such a way that the donor can determine how much is deductible and how much is not. Your disclosure statement should be made, at the latest, at the time payment is received. Subject to certain exceptions, your disclosure responsibility applies to any fund-raising circumstance where each complete payment, including the contribution portion, exceeds \$75. In addition, donors must have written substantiation from the charity for any charitable contribution of \$250 or more.

In the heading of this letter we have indicated whether you must file Form 990, *Return of Organization Exempt from Income Tax*. If "Yes" is indicated, you are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. If your gross receipts each year are not normally more than \$25,000, we ask that you establish that you are not required to file Form 990 by completing Part I of that Form for your first year. Thereafter, you will not be required to file a return until your gross receipts exceed the \$25,000 minimum. For guidance in determining if your gross receipts are "normally" not more than the \$25,000 limit, see the instructions for the Form 990. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. The maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete, so please be

Carden Elementary Charter School, Inc.

sure your return is complete before you file it. Form 990 should be filed with the Ogden Service Center, Ogden, UT 84201-0027.

You are required to make your Form 990 available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and this exemption letter. Copies of these documents must be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, *Tax-Exempt Status for Your Organization*, or you may call our toll free number shown above.

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, *Exempt Organization Business Income Tax Return*. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

Please use the employer identification number indicated in the heading of this letter on all returns you file and in all correspondence with the Internal Revenue Service. Because this letter could help resolve any questions about your exempt status, you should keep it in your permanent records. If you have any questions about this letter, or about filing requirements, excise, employment, or other federal taxes, please contact the Ohio TE/GE Customer Service office at 877-829-5500 (a toll free number) or correspond with that office using the address indicated above.

Sincerely,



Debra J. Kawecki  
Acting Manager,  
Exempt Organizations  
Technical Group 4

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

NOV 01 2013

IMAGINE PREP SURPRISE INC  
14850 N 156TH AVENUE  
SURPRISE, AZ 85379-5653

Employer Identification Number:  
45-2540762  
DLN:  
17053318355032  
Contact Person: JOANNA YAWNEY ID# 95078  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
509(a)(2)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
September 23, 2010  
Contribution Deductibility:  
Yes  
Addendum Applies:  
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Director, Exempt Organizations

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

IMAGINE PREP SURPRISE INC

You are the holder of a charter from an authorized government entity to operate a school. You have contracted with a management company to provide comprehensive services. If you change your operations and do not contract with a comprehensive management company, you may then be eligible for a school foundation status of 170(b)(1)(A)(ii).