

## APPENDIX A: 2015-16 CHARTER SCHOOL ANNUAL REPORT

PART 1: SCHOOL INFORMATION AND EXECUTIVE SUMMARY	
Name of Charter School:	Year School Opened:
New Beginnings Family Academy	2002
Street Address:	City/Zip Code:
184 Garden Street	Bridgeport, CT 06605
School Director:	School Director Contact Information:
Ronelle Swagerty	<a href="mailto:rpswagerty@nbfacademy.org">rpswagerty@nbfacademy.org</a> /203-384-2897
Grades Authorized to Serve in 2015-16:	Charter Term:
PK-8	2015-2018
<p>1. <b>Executive Summary:</b> Provide a cover letter or executive summary highlighting school progress, performance, accomplishments, and major changes during the 2015-16 school year. Include a brief narrative on the school's unique model and student population.</p>	
<p>NBFA's model is based on a social emotional learning ("SEL") approach that fosters empathy and relationships between teachers and students. Through relationships, teachers secure attachments and provide a stable environment for their students, many of whom are of low socioeconomic status (SES). In so doing, educators respond to the stressors caused by poverty, which negatively impact children's brains, and help learners develop the essential life skills needed to self-regulate, make good choices and be successful in school. Those skills- self- control, social competence, academic self-efficacy, persistence and mastery orientation- align with NBFA's S-T-R-E-T-C-H of principles of Self-controlled, Thoughtful, Responsible, Empathetic, Tenacious, Collaborative and Hard-working.</p> <p>The books that have the strongest influence on the NBFA model include Teaching with Poverty in Mind: What Being Poor Does to Kids' Brains and What Schools Can Do About It and Engaging Students with Poverty in Mind: Practical Strategies for Raising Achievement, both by Eric Jensen. These books are foundational for NBFA, whose demographic includes 91% of students who qualify for free and reduced priced meals and 98% who live in Bridgeport, one of the state's largest and poorest cities.</p> <p>NBFA's student achievement outcomes continue to demonstrate the school's efficacy, consistently outperforming Bridgeport as well as other urban districts (including New Haven, Waterbury and Hartford) on state standardized exams. Under the state of Connecticut's new Next Generation Accountability system, NBFA continues to outperform both Bridgeport and the state of Connecticut in serving our target population, High Needs students, in all three performance indexes of Math, ELA, and Science. Overall, NBFA's 2015 accountability index was 68.7, as compared to 59.3 in Bridgeport, 62.0 in New Haven, and 61.0 in Hartford. Perhaps most impressive are NBFA students' long-term outcomes. In Spring 2016, 45% of NBFA 8th graders earned admittance into such competitive high schools as Greens Farms Academy, Fairfield Prep, St. Luke's and Hopkins. Simultaneously, 56% of NBFA's Class of 2008, its oldest alumnae, graduated from college.</p>	

**PART 2: SCHOOL PERFORMANCE**

2. **School Goals:** State the school’s mission statement. Provide the school’s mission-specific, measurable goals. Analyze school progress toward these goals, providing data as appropriate. Add/Remove rows, as necessary.

Mission Statement:

New Beginnings Family Academy provides its students a rigorous education that ensures **academic success** and builds **character** in partnership with their families.

Goal Statement:	Evidence of Progress toward Goal:
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1. Reduce by 50% the number of Grade 4-8 students who scored Level 1 in ELA on the SBAC  (Target: 37 students)	86 students scored Level 1, 12 more than last year’s 75 students
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2. Reduce by 25% the number of Grade 4-8 students who scored Level 1 in Math on the SBAC  (Target: 28 students)	109 students scored Level 1, 2 less students than last year’s 111 students
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3. Move 50% of students in the top quartile that scored in levels 2 and 3 by one level in Math and ELA on the SBAC.  (Target: 13 students in ELA; 10 in Math)	Moved -10 student in math and -25 students in ELA
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4. At least 65% of students in grades K-3 will make at least one year’s <b>growth</b> in Math on iReady assessment	55% of students in grades K-3 made one year’s growth in Math on iReady assessments, which, aligned to SEED, is “Partially Meeting Goal”
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5. At least 70% of students in grades 1-3 will make at least one year’s <b>growth</b> in ELA on iReady assessment	66% of students in grades 1-3 made one year’s growth in ELA on iReady assessments, which, aligned to SEED, is “Partially Meeting Goal”
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6. NBFA will improve school climate and culture as evidenced by <b>student engagement</b> using the following indicators: <ul style="list-style-type: none"> <li>• Reduction in incidents of student absences</li> <li>• Students participate in school-wide events</li> <li>• Students report feeling safe, content and academically-supported on student surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Average Daily Attendance increased by 7%</li> <li>• Truancy decreased by 14%</li> <li>• Chronic Absenteeism decreased by 4%</li> <li>• High participation in school-wide events</li> <li>• 97% of teachers met student survey feedback goals</li> </ul>
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7. NBFA will improve school climate and culture as evidenced by <b>parent engagement</b> using the following indicators: <ul style="list-style-type: none"> <li>• Contacts (positive and negative) between teachers, school administrators and parents</li> <li>• Level of parent participation in all scheduled school on- and off-campus events</li> <li>• Parents express enthusiasm for NBFA and satisfaction with the school</li> </ul>	<ul style="list-style-type: none"> <li>• 100% of parents are satisfied with communication with their child’s teacher</li> <li>• 70% of parents are satisfied with academics and behavior management</li> <li>• 85% of parents trust all staff at NBFA</li> <li>• High parent participation in school events</li> <li>• 75% of parents participated in conferences at End of Year, which historically is the lowest attended conference</li> </ul>
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8. Student will exhibit <b>growth in social emotional learning</b> skills using the indicators specified in the Child Tends Tool	<ul style="list-style-type: none"> <li>• Average student Persistence increased from 2.81 to 2.94</li> <li>• Average student Self-Control increased from 2.84 to 3.09</li> </ul>
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	<ul style="list-style-type: none"> <li>• Average student Social Competence increased from 2.99 to 3.05</li> </ul>
9. 95% of NBFA's outgoing 8 <sup>th</sup> graders will gain acceptance into competitive, admission-based high schools	45% of NBFAs outgoing 8 <sup>th</sup> graders gained acceptance into competitive, admission-based high schools
10. NBFA will reduce its suspension rate by 50%	NBFA reduced its suspension rate by 36%

3. **Student Achievement:** Provide data summarizing school performance and academic achievement. Using the blank space provided, include data evidencing student growth and progress toward closing achievement gaps, including an analysis of normed benchmark assessment data.

Performance Metric	*2013-14:	*2014-15:	*2015-16:
Average daily attendance rate:	95.3	94.3	95.0
Chronic absenteeism rate:	9.8	17.1	7.3
Overall suspension rate: (% of students with 1+ suspension/ expulsion)	21.9	12.1	14.9
Number of in-school suspensions:	79	2	0
Number of out-of-school suspensions:	194	177	114
Number of expulsions:	0	0	1
Four Year Cohort Graduation Rate (if applicable):	N/A	N/A	N/A
Six Year Adjusted Cohort Graduation Rate (if applicable)	N/A	N/A	N/A
2015 Accountability Index charter school:	N/A	N/A	N/A
2015 Accountability Index state:	N/A	N/A	N/A

\*Source: CSDE analysis based on district submitted and certified data.  
 \*\*N<= 5. Suppressed to protect student confidentiality.

4. **Best Practice:** In 250 words or less, summarize an emerging best practice at your school in the areas of academics, instruction, or school climate (e.g. extended instructional time, supports for English learners, positive behavior management, and college access). Describe the concrete strategy and its impact on student learning and/or the school climate referencing quantitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

### PART 3: STEWARDSHIP, GOVERNANCE, AND MANAGEMENT

5. **Financial Documents:** (1) As required by C.G.S. § 10-66cc(b)(2) and 10-66pp, the charter school and if applicable, the charter school management organization of the state or local charter school, shall submit FY 2014-15 certified audit statements, including the statement of activities (showing all revenues from public and private sources, expenditures, and net operating gain/loss), balance sheet and statement of cash flows. (2) The charter school and if applicable, the charter school management organization of the state or local charter school, shall submit a complete copy of the most recently completed Internal Revenue Service form 990, including all parts and schedules, other than Schedule B of such form. (3) Provide the FY 2015-16 budget comparing submitted budget versus actual figures, with summary explanations of all major variances (any variance plus or minus 10% or more between budget and actual). (4) Provide a FY 2016-17 board-approved budget, summarizing all assumptions and major variances from FY 2016.

6. **Financial Condition:** Provide the following financial data for FY 2016.

Total margin (net income / total revenue):	<b>.01</b>
Debt to asset ratio (total liabilities / total assets):	<b>.02</b>
Debt service coverage ratio ((net income + depreciation + interest expense) / (principal + interest payments)):	-
Current asset ratio (current assets / current liabilities):	<b>9.05</b>
Days of unrestricted cash ((total expenditures - depreciation) / 365):	<b>20,003</b>
Cash flow (change in cash balance):	<b>134,183</b>

7. **Governing Board:** Consistent with C.G.S. § 10-66bb(d)(3)(A), provide the following information for all governing board members. The governing board should include teachers and parents and guardians of students enrolled in the school, and the chairperson of the local or regional board of education of the town in which the charter school is located and which has jurisdiction over a school that resembles the approximate grade configuration of the charter school, or the designee of such chairperson, provided such designee is a member of the board of education or the superintendent of schools for the school district, or the superintendents designee.

Name:	Occupation:	Board Role/Term:	Mailing/Email:	Background Check:
David C. Schlakman	Development Consultant	President	77 Roton Avenue Rowayton, CT 06853 <a href="mailto:dcschlakman@gmail.com">dcschlakman@gmail.com</a>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Claire Foerster	Retired Teacher	Vice President	19 Bermuda Road Westport, CT 06880 claire.foerster@me.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Paul Myerson	Retired Executive	Treasurer	7 Sea Spray Road Westport, CT 06880 <a href="mailto:pmyerson@optonline.net">pmyerson@optonline.net</a>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Christine King	NBFA Parent and Math Consultant	Secretary	1375 Chopsey Hill Road Bridgeport, CT 06606 Ckingeducation@gmail.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Xiomara Martinez	NBFA Employee	Recording Sec'y (ex-officio)	92 Holroyd Street Bridgeport, CT 06606 <a href="mailto:smartinez@nbfacademy.org">smartinez@nbfacademy.org</a>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Rachel Gordon	Former Teacher	Member	4 Glenwood Lane Westport, CT <a href="mailto:rae@gordon.net">rae@gordon.net</a>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Mary Humphries	NBFA Teacher	Member	2 Greystone Shelton, CT 06484 mhumphries@nbfacademy.org	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
David Hunter	Performance Management Consultant	Member	Hunter Consulting LLC Hamden, CT 06518 david@dekhconsulting.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Kevin Knight	Marketing Executive	Member	37 Cranbury Road Norwalk, CT 06851 kknight521@aol.com	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Dr. Melissa Jenkins	Bridgeport BoE Representative	Member	128 Edgemoor Road Bridgeport, CT 06606 <a href="mailto:Mjbj04@yahoo.com">Mjbj04@yahoo.com</a>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Margaret Walker	Corporate Executive	Member	45 Glover Avenue Norwalk, CT 06850 <a href="mailto:Margaret.Walker@xerox.com">Margaret.Walker@xerox.com</a>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

**8. Renewal Terms and Other Issues:** Provide a progress update on terms established in the charter school's most recent renewal; summarize actions taken and progress data to substantiate efforts to address such terms. Provide an update on how the charter school is addressing or plans to address the issues noted. The chart below is pre-populated to include terms documented in the school's last renewal resolution or issues identified by the CSDE.

Standard/Indicator:	Term or Condition:	Progress Update:
1.4. Chronic Absenteeism	The school's chronic absenteeism rate for 2014-15 is well above the state average of 10.6%. A plan to target chronic absenteeism reduction was received by the CSDE on September 30, 2015.	The team consists of the Head of School, Dean of Student and Family Services, Family Services Coordinator, Data Specialist and the schools' Power School administrator. The group meets weekly to review attendance, identify trends and intervene where needed, as outlined in the plan. School must continue to implement plans and evaluate effectiveness. CSDE will monitor and provide technical assistance as necessary.
2.1. Financial Management	Update policies and procedures for routine accounting functions and financial controls.	The Board of Directors at its March 17, 2015 meeting, voted unanimously to update policies and procedures concerning its accounting functions and financial controls. School must continue to implement plans and evaluate effectiveness. CSDE will monitor and provide technical assistance as necessary.
2.4. Governance and Management	Update board policies for background checks, nepotism and posting public meetings on the school's Web site.	The Board of Directors at its March 17, 2015 meeting, voted unanimously to update board policies concerning background checks, nepotism and the requirements for posting public meetings and minutes on the school's Web site. School must continue to implement plans and evaluate effectiveness. CSDE will monitor and provide technical assistance as necessary.
3.5. School Culture and Climate	A plan to address your school's suspension rate was received by the CSDE on September 30, 2015.	An effective school-wide behavioral management program implemented during the 2014-15 academic year has already significantly reduced the number of New Beginnings Family Academy students suspended in the past year by 45% while also positively impacting the number of repeat offenses in the school. Efforts to continue to trend will continue using the research-based Responsive Classroom and Restorative Practices approaches. School must continue to implement plans and evaluate effectiveness. CSDE will monitor and provide technical assistance as necessary.
4.5. Teacher/Staff Credentials	Bureau of Educator Standards and Certification sent a letter to the school on June 1, 2016 regarding educators for the 2015-16 school year who were identified on the Certification Compliance Report for non-compliance issues.	New Beginnings Family Academy resolved the few instances of teacher certification non-compliance throughout the year. CAPOZZI KEITH 7877171259 - no longer employed at NBFA. MYRTHIL PATRICK 1541042221- no longer employed at NBFA. HABANSKY KATHERINE 7009772992 – DSAP issued; 3/17 expiration. MORALES JENNIFER 7011849477 – certification

		renewed. HALEY OCTAVIA 7634567639 – ED 175 filed.
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9. Best Practice: In 250 words or less, summarize an emerging best practice at your school in the areas of stewardship, governance, and management (e.g., financial management, technology, school operations). Describe the concrete strategy and its impact on the school referencing quantitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

With regards to financial management, since its inception, NBFA has had successful audits with no hint of impropriety. To ensure ongoing efficacy of school operations and sound fiscal management, NBFA follows board-approved policies and procedures governing the handling of credit card purchases and reconciliations; a monthly review of bank statement reconciliations by the board's treasurer; frequent collection of field trip monies by its Chief Operating Officer and a protocol for the approval of purchases.

With regards to technology, as a district that is moving towards integrating science, technology, engineering, art and math into the curriculum NBFA has begun pursuing ways to allow its educators to more efficiently enhance

student learning through digital technology.

To do this, during the 2015-2016 school year, NBFA implemented four strategies to make technology more accessible and effective. In the first strategy, NBFA increased the amount of technological resources available within the school building. Specifically, NBFA purchased 30 new desktop computers for students, 54 new student laptops, 14 teacher projectors with interactive capability. With these new devices, students had greater access to computers to (1) practice their literacy and mathematical skills; (2) type essays; (3) create presentations; (4) conduct research. The new projectors allowed for teachers to integrate more visual elements into their lessons. Technology was also made more accessible across 2nd - 8th grade classrooms by increasing the bandwidth and by adding another Wi-Fi access point, which allows for more Wi-Fi users at the same time.

In the third strategy, NBFA continued to make current technology more effective by introducing Google Classroom in 7th and 8th grade. This new use of the student laptops increased the amount of timely feedback provided between the teacher and the student for computer-based projects. For example, as students were working on an end of unit STEM essay last year, the teacher read each one as it was being typed and while continually guiding their students along the way. By using this resource, students not only completed their essays faster but also with more depth.

Lastly, NBFA hired an onsite IT specialist whose responsibilities allow for faster response to technological concerns. As a result, a greater percentage of computers and projectors are in use each day.

**PART 4: STUDENT POPULATION**

**10. Enrollment and Demographic Data:** Provide 2015-16 student demographic and enrollment information.

Grades Served:	PK-8	Student Enrollment:	497
% Free/Reduced-Price Lunch:	91%	% Black:	68%
% Special Education:	9%	% Hispanic:	27%
% Limited English Proficiency:	0%	% Caucasian:	4%

**2015-16 Enrollment by Grade Level:**

PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
56	58	72	61	54	63	36	44	32	23					<b>499</b>

**11. Enrollment Efforts:** Summarize the school’s efforts to attract, enroll, and retain a diverse and representative student population, including minority students, low-income students, English learners, and students with disabilities.

NBFA has experienced a demographic shift among its student body that is reflective of the Bridgeport community, with the Hispanic population increasing for the past three years (from 15% in 2013 to 24% in 2015 and 27% in 2016). NBFA’s special education population has also held at 9% of students receiving services under Individualized Education Plans. Most NBFA students, 91%, qualify for free or reduced-price lunch, an indicator of poverty.

NBFA is in business to serve these special populations and their families well. The school provides a safe, supportive, developmentally appropriate learning environment that meets the individual needs of every student. For students showing exceptionalities, the process involves a referral process and continuum of supportive services. The school's inter-disciplinary SRBI team is made up of teachers, specialists and parents/guardians, who work together to develop necessary interventions to remedy any concerns (e.g. attendance, behavior, social interactions, environmental) that could impede learning.

The home/school collaboration plays a major role in helping NBFA retain its special populations. Staff members make home visits to establish the bridge that fosters a long-term partnership between family members and the school. The relationship facilitates a dialogue wherein family needs are identified and met by NBFA's professional staff and interns or referred out to community-based organizations.

In recent years, New Beginnings Family Academy has increased the number of bilingual teachers and staff to better reflect the community it serves.

**12. Waitlist Data:** Provide waitlist totals below, illustrating demand and community support for the school.

2015-16 Waitlist:	2016-17 Waitlist:
510	564

**13. Best Practice:** In 250 words or less, summarize an emerging best practice at your school in the areas of student populations (e.g., family and community engagement, recruitment processes, retention strategies). Describe the concrete strategy and its impact on the school referencing quantitative data. Provide evidence of collaboration with local school districts in this area, as appropriate.

New Beginnings Family Academy is in the process of becoming the **state's only progressive Pre-K/4 - grade 8 public charter school with emotionally responsive practice.**

This student-centered approach is steeped in child development, project-based and encourages children to make meaning of the world around them by engaging in hands-on activities, both inside and outside the classroom. Our goals are to a) deeply understand our students and their plights; b) weave trauma-informed, preventive mental health strategies into all of our classrooms to enable poverty-impacted students to learn optimally; c) make learning come alive and be more relevant to students; and d) facilitate learning in a way that is affirming and respectful of the diverse needs and styles of each student.

NBFA has been shifting to a more social emotional learning (SEL) approach since the installation of the current administrative team in 2013. In 2016-2017, NBFA will complete the process by becoming a progressive school with emotionally responsive practice, understanding that such a pedagogical shift will take some time to perfect. Specifically, successful implementation of the approach requires the following:

1. **Ongoing professional development for teachers.** NBFA's teachers and staff are receiving training from Bank Street College, a leader in progressive education, which has been preparing adults to teach and work in such schools since 1916. Bank Street will offer an end-of-year training in June as well as three PD days in August that will help prepare teachers, who are in the process of visiting similar schools. Additionally, Bank Street will be in the building working directly with teachers in their classrooms every two weeks throughout the school year. Administrators are taking immersion training this summer and will offer ongoing support during collaborative planning time throughout the year.
2. **Adequate teacher planning time.** More collaborative planning time for teachers is needed to maximize experiential learning opportunities for students. In order to achieve this for NBFA's unionized teachers, who work an 8-hour day under the collective bargaining agreement, the school will shorten the student school day from 10 to 8 hours.
3. **Shortened student school day.** NBFA's student school day will operate from 7:50 – 1:50 p.m., with extended hours to 3:50 p.m. for students/families who need it. This community-driven decision was informed not just by the need for more teacher planning time, but also by parent and teacher input that a 10-hour day is too grueling for children. Specifically, parents complained that by the time students got off the school bus from the extended day program, which kept them in school for 10 hours, they were too exhausted to enjoy dinner, family time or get homework done.
4. **Reduced class sizes.** Smaller class sizes are needed to increase the teacher/student ratio so as to facilitate learning environments that are inviting (progressive) versus containing (traditional). This will be achieved by moving NBFA's 7<sup>th</sup> and 8<sup>th</sup> graders into its reconfigured annex building, currently being used for physical education. NBFA will partner with the YMCA, just three blocks away to provide age-appropriate physical education activities coordinated by NBFA's full-time PE/health teacher.
5. **Modified school dress code.** In an effort to allow for student self-expression, reduce student/teacher conflict around attire and increase instructional time, NBFA will make uniforms optional.

NBFA has taken the time over the past year to solicit parent, teacher and student feedback in multiple surveys in this child-centered, project-based model of education. Backed by research and supported by a 100-year-old institution filled with experts in this model, the teachers and staff look forward to dramatically improving the quality of education offered to its students and families, who will also receive training in the model.

## APPENDIX B: 2017-18 PRELIMINARY ENROLLMENT REQUEST

**Directions:** On an annual basis, charter schools must submit an enrollment request for the following school year. Consistent with C.G.S. § 10-66bb(c), the State Board of Education considers enrollment requests in the context of each school’s charter and record of student achievement.

C.G.S. § 10-66bb(c)(2) places an enrollment cap on the number of students that a state charter school may enroll. However, charter schools with a demonstrated record of achievement may seek a waiver. If the submitted 2017-18 enrollment request requires an enrollment waiver, please specify that below.

1. Complete the table below providing the school’s enrollment and growth history. Submit an enrollment request and growth projections for the upcoming school year.															
School Year:	Actual Enrollment:														
	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2013-14															
2014-15															
2015-16	56	58	72	61	54	63	36	44	32	23					<b>499</b>
2016-17	56	58	72	61	54	63	36	44	32	23					<b>499</b>
School Year:	2016-17 Enrollment Request:														
	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2017-18	54	56	58	72	61	54	63	36	44	32					<b>530</b>
2. Based on the request entered above, is the school seeking a waiver to the enrollment cap described in C.G.S. § 10-66bb(c)(2), no state charter school shall enroll more than two hundred fifty students, or in the case of a kindergarten to grade eight, inclusive, school, more than three hundred students, or twenty-five per cent of the enrollment of the school district in which the state charter school is to be located, whichever is less.														<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
3. Provide a rationale for the enrollment request, including a synopsis of all relevant assumptions.															
<p>NBFA will request 35 additional seats in 2017-2018. Although this represents an increase of 33 seats over 2016-2017 enrollment, it holds steady grade growth and allows for a slight reduction in class sizes in Pre-K. The size of teaching staff and administration will not change over 2016-2017 staffing, which increased by 9 full-time Instructional Assistants to accommodate the school’s progressive model with emotionally responsive practice implemented at the start of the 2016 academic year.</p> <p>Future operating expense increases will stem primarily from annual increases in salaries and benefits. Salary increases should approximate no more than 5% in the low inflation environment in which NBFA operates. Furthermore, average salary costs of the teaching staff will be controlled by hiring educators at the early stages of their careers and salary levels. The increase in benefit costs will be managed by increasing the contribution percentage which staff will have to pay toward medical and dental coverage.</p> <p>In addition, health insurance cost increases will be limited by establishing a base level of coverage that NBFA will provide and charge employees for the additional cost of any options they choose over and above the base level coverage. Other expense increases should mirror inflation and be controllable.</p>															

4. Summarize the school's plans to successfully expand and accommodate the needs of the students served (e.g., programming, staffing, facilities, and class size).

At NBFA, some students start Pre-K with issues of home violence, frequent changing of residence, lack of warm clothing, lack of a safe place – all of which have a profound impact on their development.

Given the toxic stress many NBFA students endure and the impact on their academic and social capabilities, a more holistic approach that seamlessly integrates instruction with social emotional learning is needed.

Thus, with help from child development experts at Bank Street College of Education in New York, NBFA will embed current SEL interventions (Responsive Classroom, Restorative Practices) in emotional responsive practice by a) developing school routines that enhance teacher-child interaction by ensuring that adults understand the plight of their students, how it affects their brain and what they can do to address it in developmentally appropriate and empathic ways; b) creating emotionally responsive curriculum to address unresolved issues and enhance children's attention and motivation for learning; and c) implementing techniques to promote community and address peer issues in early childhood and elementary grade classrooms.

In order for NBFA to realize its goal of becoming a cutting-edge, progressive public charter school with high social emotional learning competency, NBFA must reduce class size to facilitate experiential learning and improve individualized instruction academically, socially and emotionally; ensure two adults per room (up to grade 6) to adequately support the full range of learners in each classroom; engage and train parents in Emotionally Responsive Practice; shorten the NBFA school day for students to provide more collaborative planning time for its unionized teachers, whose work hours are limited by a collective bargaining agreement; and explore eliminating the NBFA uniform policy to allow for student self-expression, reduce student/teacher conflict and increase instructional time.

Among the school's immediate needs is a short-term space solution to relocate its middle school students to allow for the reduction of class sizes, from an average 23 to 20, in the 2016-2017 school year. Smaller class sizes are desirable because they foster stronger classroom communities, increase teacher/student interactions, ensure more individualized attention and reduce the overall number of disruptions in a room (Schanzenbach, 2014). Once class sizes are addressed, the foundation will be set for NBFA to begin its transformation.

NBFA leaders recognize that adopting a progressive model of education will require a significant amount of professional development, which teachers and staff will receive from ERP at Bank Street partners. They also know that doing so successfully is mission-critical to the life-enhancing outcomes it desires for its poverty-impacted students. By expanding its definition of SEL to include emotionally responsive practice, NBFA will optimize teaching and learning by creating an environment that is safe for adults and children to be vulnerable, to develop deep understandings and to foster meaningful relationships. NBFA will become a school full of child development experts armed with the techniques and strategies needed to combat poverty's debilitating impact on children's learning. Over time, NBFA students will demonstrate the emotional wherewithal to actively participate in learning that fosters the development of critical thinking, creative expression and healthy discourse.

## APPENDIX C: CHARTER SCHOOL PERFORMANCE FRAMEWORK

The Connecticut State Department of Education’s (CSDE) charter school performance framework promotes clear and transparent expectations for all charter schools. The four performance standards are central to measuring schools’ efficacy and viability, and align to state law and national best practices among charter school authorizers, as accumulated by the National Association of Charter School Authorizers. Within each standard area, the framework identifies a series of indicators used to evaluate charter schools. The framework drives the CSDE’s charter school accountability systems and processes, including initial approval decisions, annual monitoring, and renewal determinations.

Performance Standards:	
<b>1.</b>	<b>School Performance:</b> Is the school a successful model resulting in strong student outcomes and a positive school climate?
<b>2.</b>	<b>Stewardship, Governance, and Management:</b> Is the school financially and organizationally healthy and viable?
<b>3.</b>	<b>Student Population:</b> Is the school promoting equity by effectively attracting, enrolling, and retaining students, particularly among targeted populations?
<b>4.</b>	<b>Legal Compliance:</b> Is the school acting in compliance with applicable laws and regulations?

Performance Standards:	Performance Indicators:
1. School Performance	1.1. Academic Achievement a. ELA Performance Index – All Students b. ELA Performance Index – High Needs Students c. Math Performance Index – All Students d. Math Performance Index – High Needs Students e. Science Performance Index – All Students f. Science Performance Index – High Needs Students 1.2. Academic Growth (Longitudinal) (a. All Students, b. High Needs) 1.3. Participation Rates (a. All Students, b. High Needs) 1.4. Chronic Absenteeism (a. All Students, b. High Needs) 1.5. Preparation for Postsecondary and Career Readiness - % Taking Courses 1.6. Preparation for Postsecondary and Career Readiness - % Passing Exams 1.7. Graduation – On – Track in 9 <sup>th</sup> Grade 1.8. Four Year Graduation - All Students 1.9. Six Year Graduation - High Needs Students 1.10. Postsecondary Entrance Rate (All Students) 1.11. Physical Fitness 1.12. Arts Access
2. Stewardship, Governance, and Management	2.1. Financial Management 2.2. Financial Reporting 2.3. Financial Viability 2.4. Governance and Management 2.5. Facility
3. Student Population	3.1. Recruitment and Enrollment Process 3.2. Waitlist and Enrollment Data 3.3. Demographic Representation 3.4. Family and Community Support 3.5. School Culture and Climate
4. Legal Compliance	4.1. Open Meetings and Information Management 4.2. Students with Disabilities 4.3. English Learners 4.4. Rights of Students 4.5. Teacher/Staff Credentials 4.6. Employee Rights

## APPENDIX D: STATEMENT OF ASSURANCES

It is imperative that charter schools – as with all other public schools – adopt and uphold the highest ethical and legal standards while delivering excellent academic opportunities for students and their families.

As the authorized representative of **New Beginnings Family Academy**, to the best of my knowledge, I affirm that:

1. Pursuant to C.G.S.A. § 10-66rr, all board members and staff have satisfactorily completed background checks, including a state and national criminal records checks and a record check of the Department of Children and Families child abuse and neglect registry.
2. Pursuant to C.G.S.A. § 10-66rr, if applicable, all charter school management organization (CMO) governing board members and staff members, who performs a service involving direct student contact have satisfactorily completed background checks, as described in (1).
3. All contractors doing business with the school, who performs a service involving direct student contact have satisfactorily completed background checks, as described in (1).
4. Records of any and all background checks described above, are on file at New Beginnings Family Academy and available for random audit by the Connecticut State Department of Education (CSDE).
5. Pursuant to C.G.S.A. § 10-6600, New Beginnings Family Academy's Governing Board has adopted written anti-nepotism and conflict of interest policies consistent with state law and best practices in nonprofit corporate governance, and pursuant to 10-66bb(d), that no member or employee of the Governing Board has a personal or financial interest in any asset, real or personal, of the charter school .
6. Pursuant to C.G.S.A. § 10-6600, each member of a governing council of a state or local charter school shall complete training related to charter school governing council responsibilities and best practices at least once during the term of the charter, and that no board member of New Beginnings Family Academy serves on the board of another charter school or CMO.
7. All public funds received by New Beginnings Family Academy have been, or are being, expended prudently and in a manner required by law.
8. All Governing Board meetings are open and accessible to the public, and that New Beginnings Family Academy has posted, and continues to post, on any Internet website that the Governing Board operates, the schedule, agenda, and minutes of each Governing Board meeting, including any meeting of a subcommittee of the Governing Board.
9. New Beginnings Family Academy does not discriminate in any employment practice, education program, or educational activity on the basis of race, color, religious creed, sex, age, national origin, ancestry, marital status, sexual orientation, gender identity or expression, disability, or any other basis prohibited by Connecticut state and/or federal nondiscrimination laws.



9/29/16

By signing this Statement of Assurances on behalf of the Governing Board of New Beginnings Family Academy, I acknowledge that I understand the terms contained herein and affirm the validity of each statement to the best of my knowledge. I further understand that New Beginnings Family Academy may be subject to random audit by the CSDE to verify these statements.

Signature:



Name of Board Chairperson:

DAVID C. SCHLAKMAN

Date:

9-29-16

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

**INDEPENDENT AUDITOR'S REPORT,  
FINANCIAL STATEMENTS,  
AND  
STATE FINANCIAL ASSISTANCE**

**JUNE 30, 2015**

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

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**JUNE 30, 2015**

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## INDEPENDENT AUDITOR'S REPORT

**Venman & Co. LLC**  
Certified Public Accountants

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Bernhard F. Bruder, CPA

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### Of Counsel

Russell P. Stockman, CPA

### Services

Financial Statements  
Federal and State Tax Compliance  
Income Tax Planning  
Compensation & Benefit Planning  
Banking Relationships  
Investment Alternatives  
Estate Planning & Valuation  
Management Transition  
Mergers & Acquisitions

### Affiliations

American Institute of  
Certified Public Accountants  
  
Connecticut Society of  
Certified Public Accountants

December 21, 2015

Board of Directors  
New Beginnings Family Academy, Inc.  
184 Garden Street  
Bridgeport, CT 06605

### Report on the Financial Statements

We have audited the accompanying financial statements of New Beginnings Family Academy, Inc. (a nonprofit organization), which comprise the statements of financial position as of June 30, 2015 and 2014, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



### **Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of New Beginnings Family Academy, Inc. as of June 30, 2015 and 2014, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### **Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated December 21, 2015, on our consideration of New Beginnings Family Academy, Inc.'s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering New Beginnings Family Academy, Inc.'s internal control over financial reporting and compliance.

Venman + Co LLC

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

**STATEMENTS OF FINANCIAL POSITION**

	<b>June 30,</b>	
	<u><b>2015</b></u>	<u><b>2014</b></u>
<b>ASSETS</b>		
Cash	\$ 699,392	\$ 1,490,072
Grants receivable	165,629	47,996
Other receivables	221,105	153,607
Due from related party	12,221	-
Prepaid expenses	73,921	151,039
Equipment and leasehold improvements		
Furniture and equipment	700,790	806,676
Leasehold improvements	3,095,324	1,344,650
	<u>3,796,114</u>	<u>2,151,326</u>
Less accumulated depreciation and amortization	<u>1,139,306</u>	<u>1,104,366</u>
Net equipment and leasehold improvements	2,656,808	1,046,960
Construction in progress	-	115,692
Interest in net assets of Friends of New Beginnings Family Academy, Inc.	<u>1,938,000</u>	<u>1,942,000</u>
<b>TOTAL ASSETS</b>	<u><u>\$ 5,767,076</u></u>	<u><u>\$ 4,947,366</u></u>
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities		
Accounts payable	\$ 56,102	\$ 200,329
Accrued expenses	443,654	392,708
Deferred revenue	<u>-</u>	<u>338,568</u>
Total liabilities	499,756	931,605
Net assets		
Unrestricted	3,329,320	1,699,595
Temporarily restricted	<u>1,938,000</u>	<u>2,316,166</u>
Total net assets	<u>5,267,320</u>	<u>4,015,761</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u><u>\$ 5,767,076</u></u>	<u><u>\$ 4,947,366</u></u>

**THE ACCOMPANYING NOTES ARE AN INTEGRAL PART OF THESE FINANCIAL STATEMENTS**

**NEW BEGINNINGS FAMILY ACADEMY, INC.**  
**STATEMENT OF ACTIVITIES**  
**YEAR ENDED JUNE 30, 2015**

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Total</u>
Support and revenues			
Federal and state financial assistance	\$ 6,381,512	\$ -	\$ 6,381,512
Contributions			
Cash	723,164	157,350	880,514
Services	48,000	-	48,000
Interest income	97	-	97
Special event (Gala)	306,750	-	306,750
Change in interest in net assets of Friends of New Beginnings Family Academy, Inc. (Friends)	-	5,046	5,046
Other	232,205	-	232,205
Total support and revenues	<u>7,691,728</u>	<u>162,396</u>	<u>7,854,124</u>
Net assets released from restrictions			
Restrictions satisfied by distributions from Friends	9,046	(9,046)	-
Restrictions satisfied by payments	531,516	(531,516)	-
Total net assets released from restrictions	<u>540,562</u>	<u>(540,562)</u>	<u>-</u>
Total support, revenues and net assets released from restrictions	<u>8,232,290</u>	<u>(378,166)</u>	<u>7,854,124</u>
Expenses			
Salary and wages	3,836,210	-	3,836,210
Employee benefits	802,153	-	802,153
Payroll taxes	247,567	-	247,567
Staff recruiting	4,324	-	4,324
Legal fees	1,990	-	1,990
Postage and shipping	7,178	-	7,178
Occupancy	396,616	-	396,616
Equipment rental and maintenance	105,728	-	105,728
Travel	14,573	-	14,573
Transportation	41,266	-	41,266
Depreciation and amortization	150,201	-	150,201
Other fees	16,824	-	16,824
Outside services	137,122	-	137,122
Professional fees	28,315	-	28,315
Security	15,419	-	15,419
Insurance	68,675	-	68,675
Testing and evaluation	834	-	834
Instructional supplies	162,378	-	162,378
Other supplies	11,638	-	11,638
Custodial supplies	30,197	-	30,197
Payroll service	14,044	-	14,044
Food service	313,511	-	313,511
Other activities	12,944	-	12,944
Student activities	23,261	-	23,261
Office	65,884	-	65,884
Special event expenses (Gala)	93,247	-	93,247
Total expenses	<u>6,602,099</u>	<u>-</u>	<u>6,602,099</u>
Loss on disposal of equipment	466	-	466
Total expenses and losses	<u>6,602,565</u>	<u>-</u>	<u>6,602,565</u>
<b>INCREASE (DECREASE) IN NET ASSETS</b>	<u>1,629,725</u>	<u>(378,166)</u>	<u>1,251,559</u>
Net assets at beginning of year	<u>1,699,595</u>	<u>2,316,166</u>	<u>4,015,761</u>
<b>NET ASSETS AT END OF YEAR</b>	<u>\$ 3,329,320</u>	<u>\$ 1,938,000</u>	<u>\$ 5,267,320</u>

THE ACCOMPANYING NOTES ARE AN INTEGRAL PART OF THESE FINANCIAL STATEMENTS

**NEW BEGINNINGS FAMILY ACADEMY, INC.**  
**STATEMENT OF ACTIVITIES**  
**YEAR ENDED JUNE 30, 2014**

	<b>Unrestricted</b>	<b>Temporarily Restricted</b>	<b>Total</b>
Support and revenues			
Federal and state financial assistance	\$4,728,910	\$ -	\$4,728,910
Contributions			
Cash	487,284	325,602	812,886
Services	43,000	-	43,000
Interest income	286	-	286
Change in interest in net assets of Friends of New Beginnings Family Academy, Inc. (Friends)	-	(10,174)	(10,174)
Other	205,444	-	205,444
Total support and revenues, net	5,464,924	315,428	5,780,352
Net assets released from restrictions			
Restrictions satisfied by distributions from Friends	116,826	(116,826)	-
Restrictions satisfied by payments	140,339	(140,339)	-
Total net assets released from restrictions	257,165	(257,165)	-
Total support, revenues and net assets released from restrictions	5,722,089	58,263	5,780,352
Expenses			
Salary and wages	3,345,563	-	3,345,563
Employee benefits	681,086	-	681,086
Payroll taxes	194,654	-	194,654
Legal fees	21,696	-	21,696
Postage and shipping	5,429	-	5,429
Occupancy	328,008	-	328,008
Equipment rental and maintenance	95,439	-	95,439
Travel	14,226	-	14,226
Transportation	22,546	-	22,546
Depreciation and amortization	155,879	-	155,879
Other fees	15,133	-	15,133
Outside services	185,864	-	185,864
Professional fees	65,154	-	65,154
Security	10,623	-	10,623
Insurance	55,771	-	55,771
Testing and evaluation	4,696	-	4,696
Instructional supplies	78,847	-	78,847
Other supplies	4,978	-	4,978
Custodial supplies	14,654	-	14,654
Payroll service	9,071	-	9,071
Food service	233,696	-	233,696
Other activities	10,582	-	10,582
Student activities	29,982	-	29,982
Office	74,989	-	74,989
Total expenses	5,658,566	-	5,658,566
Loss on disposal of equipment	1,280	-	1,280
Total expenses and losses	5,659,846	-	5,659,846
<b>INCREASE IN NET ASSETS</b>	62,243	58,263	120,506
Net assets at beginning of year	1,637,352	2,257,903	3,895,255
<b>NET ASSETS AT END OF YEAR</b>	<b>\$1,699,595</b>	<b>\$2,316,166</b>	<b>\$4,015,761</b>

THE ACCOMPANYING NOTES ARE AN INTEGRAL PART OF THESE FINANCIAL STATEMENTS

NEW BEGINNINGS FAMILY ACADEMY, INC.

STATEMENTS OF CASH FLOWS

	<u>Year Ended June 30,</u>	
	<u>2015</u>	<u>2014</u>
<b>Operating activities</b>		
Increase in net assets	\$ 1,251,559	\$ 120,506
Adjustments to reconcile increase in net assets to net cash provided by operating activities:		
Depreciation and amortization	150,201	155,879
Loss on disposal of equipment	466	1,280
Decrease in net assets of Friends of New Beginnings Family Academy, Inc.	4,000	127,000
(Increase) decrease in:		
Grants receivable	(117,633)	(7,256)
Other receivables	(67,498)	(138,515)
Due from related party	(12,221)	38,504
Prepaid expenses	77,118	(70,614)
Increase (decrease) in:		
Accounts payable	(144,227)	157,991
Accrued expenses	50,946	50,311
Deferred revenue	(338,568)	338,568
Net cash provided by operating activities	854,143	773,654
<b>Investing activities</b>		
Acquisition of equipment and leasehold improvements	(1,646,823)	(159,539)
Proceeds from disposal of equipment	2,000	-
Payments for construction in progress	-	(91,664)
Net cash used by investing activities	(1,644,823)	(251,203)
Increase (decrease) in cash for the year	(790,680)	522,451
Cash at beginning of year	1,490,072	967,621
<b>CASH AT END OF YEAR</b>	<u>\$ 699,392</u>	<u>\$ 1,490,072</u>

THE ACCOMPANYING NOTES ARE AN INTEGRAL PART OF THESE FINANCIAL STATEMENTS

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

**NOTES TO FINANCIAL STATEMENTS**

**JUNE 30, 2015**

**NOTE 1. ORGANIZATION**

New Beginnings Family Academy, Inc. (NBFA) is a not-for-profit corporation incorporated under the Nonstock Corporation Act of Connecticut. The Connecticut State Board of Education issued NBFA a charter that permits NBFA to operate a school in Bridgeport, Connecticut. NBFA provides full day pre-kindergarten and kindergarten, and grades one through eight, with an emphasis on combining academic standards and promoting a positive self-image. The primary sources of revenue for NBFA are federal and state grants.

**NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

**EQUIPMENT AND LEASEHOLD IMPROVEMENTS**

Equipment and leasehold improvements are recorded at cost and include expenditures which materially increase values or extend useful lives. Upon disposition or retirement of equipment and leasehold improvements, the cost and related accumulated depreciation or amortization are eliminated from the respective accounts and the resulting gain or loss is included in the statement of activities. Expenditures in the nature of normal repairs and maintenance are charged to operations as incurred.

Depreciation of equipment is provided by the straight-line method over the estimated useful lives of the assets. Amortization of leasehold improvements is provided by the straight-line method over the term of the lease, including renewal option periods anticipated to be exercised.

**UNRESTRICTED AND RESTRICTED REVENUE AND SUPPORT**

Contributions received are recorded as unrestricted, temporarily restricted, or permanently restricted, depending on the existence and/or nature of any donor restrictions. When a restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished), temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions. However, temporarily restricted contributions received and expended during the same year are recorded as unrestricted support. NBFA has not received permanently restricted funds.

**GRANTS RECEIVABLE**

Grants receivable are stated at the amount management expects to collect from outstanding balances. This estimate is based on management's assessments of the creditworthiness of its grantors, the aged basis of its receivables, as well as current economic conditions and historical information. The carrying value of grants receivable approximates fair value.

**USE OF ESTIMATES**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

**NOTES TO FINANCIAL STATEMENTS**

**JUNE 30, 2015**

**NOTE 3. CONTRIBUTED SERVICES**

NBFA recognizes contributions of services received if they create or enhance nonfinancial assets or require specialized skills and would typically need to be purchased if not provided by donation. General volunteer services do not meet the criteria for recognition in the financial statements; however, substantial numbers of volunteers have donated significant amounts of time to NBFA.

Special education and other services with a fair value of \$48,000 for 2015 and \$43,000 for 2014 were received from the City of Bridgeport Board of Education and have been recorded as contribution support with an offsetting expense included as part of outside services.

**NOTE 4. TEMPORARILY RESTRICTED NET ASSETS/FRIENDS OF NEW BEGINNINGS FAMILY ACADEMY, INC.**

Friends of New Beginnings Family Academy, Inc. (Friends) was formed to function as a supporting organization in furtherance of the activities, programs, and goals of NBFA. NBFA is the sole beneficiary of the activities of Friends and, therefore, records the net operating activities and distributions of Friends in its temporarily restricted net assets.

NBFA does not have influence to such an extent that it can determine the timing and amount of distributions from Friends; therefore, the amounts not transferred are temporarily restricted net assets until distributions are made to NBFA. The temporarily restricted net asset portion related to Friends amounted to \$1,938,000 in 2015 and \$1,942,000 in 2014.

Temporarily restricted net assets consisted of:

	<b>June 30,</b>	
	<b>2015</b>	<b>2014</b>
Friends, net assets	\$ 1,938,000	\$ 1,942,000
Pre-kindergarten classrooms	-	334,503
Art Program	-	10,203
School Climate Program	-	29,460
Total	<u>\$ 1,938,000</u>	<u>\$ 2,316,166</u>

**NOTE 5. CONCENTRATIONS**

**SOURCE OF SUPPLY OF LABOR**

Certified teachers are members of New Beginnings Education Association that has a contract with NBFA expiring on June 30, 2016.

**SOURCE OF REVENUE**

NBFA receives a substantial amount of its revenue from various federal and state grants. The loss of these revenue sources could have a material adverse effect on the operations of NBFA.

NEW BEGINNINGS FAMILY ACADEMY, INC.

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

**NOTE 5. CONCENTRATIONS (continued)**

**CASH**

During the year and at the statement of financial position date, NBFA maintained cash balances at banks in excess of the insurance limit (\$250,000) of the Federal Deposit Insurance Corporation. However, NBFA has not experienced any losses in this area and management does not believe that its cash balances are subject to significant credit risk.

**NOTE 6. INCOME TAXES**

NBFA is a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and is not subject to federal and state income taxes; however, it is subject to federal and state tax examinations by the taxing authorities for years ended June 30, 2012 and thereafter.

**NOTE 7. LINE OF CREDIT**

As of June 30, 2015, NBFA had an unused demand line of credit in the amount of \$500,000 that bears interest at the bank's prime rate plus 1%. The line of credit is secured by substantially all of NBFA's assets and is subject to annual review and renewal.

**NOTE 8. LEASE COMMITMENT – RELATED PARTY**

NBFA leases its facility from Friends under a non-cancelable operating lease that expires in August 2016 with a renewal option for two additional five year terms. Rent expense for the operating lease amounted to \$119,119 in 2015 and \$116,783 in 2014.

Future minimum lease payments under the operating lease are:

<u>Year Ending June 30,</u>	
2016	\$ 121,501
2017	<u>20,317</u>
	<u>\$ 141,818</u>

**NOTE 9. CONNECTICUT TEACHERS' RETIREMENT PLAN**

All certified administrators and teachers participate in the Connecticut Teachers' Retirement System that is administered by the State. The plan requires mandatory contributions by employees of 7.25% of their eligible annual compensation. The State of Connecticut provides the remaining funding of retirement benefits.

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

**NOTES TO FINANCIAL STATEMENTS**

**JUNE 30, 2015**

**NOTE 10. FEDERAL AND STATE FINANCIAL ASSISTANCE**

Revenues from governmental grants consist of:

	<u>Year Ended June 30,</u>	
	<u>2015</u>	<u>2014</u>
<b><u>State of Connecticut</u></b>		
State Department of Education		
Charter Schools	\$ 5,170,000	\$ 4,200,000
Charter School Building Project and Improvements	608,084	104,614
Healthy Foods Initiative	5,858	5,743
Child Nutrition State Matching Grant	2,855	2,806
State School Breakfast	3,505	3,771
State Department of Public Safety		
School Security Competitive Grant Program	104,745	-
Total State of Connecticut	<u>5,895,047</u>	<u>4,316,934</u>
<b><u>Federal</u></b>		
U.S. Department of Agriculture		
Passed through the State Department of Education		
School Breakfast Program	73,426	61,952
National School Lunch Program	227,904	173,371
U.S. Department of Education		
Passed through State Department of Education		
Title I - Improving Basic Programs	182,724	174,094
Title II Part A - Teachers	2,411	2,559
Total Federal	<u>486,465</u>	<u>411,976</u>
Total Governmental Grants	<u>\$ 6,381,512</u>	<u>\$ 4,728,910</u>

**NOTE 11. FUNCTIONAL CLASSIFICATION OF EXPENSES**

Expenses that can be directly identified with program services, supporting services or fundraising to which they relate are charged accordingly. Other expenses by function have been allocated between program services, supporting services, and fundraising classifications based upon various criteria.

Expenses by function consist of:

	<u>Year Ended June 30,</u>	
	<u>2015</u>	<u>2014</u>
Program services - education	\$ 5,210,074	\$ 4,753,671
Supporting services - management and general	1,298,778	904,895
Fundraising - special events	93,247	-
	<u>\$ 6,602,099</u>	<u>\$ 5,658,566</u>

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

**NOTES TO FINANCIAL STATEMENTS**

**JUNE 30, 2015**

**NOTE 12. DEFERRED REVENUE/COMMITMENT**

Deferred revenue as of June 30, 2014 consisted of the unexpended grant funds received during the year for the construction of new classrooms; in the current year NBFA received approximately \$270,000 that represented the remaining amount of the original grants that had been approved in July 2013.

**NOTE 13. RECLASSIFICATION**

Certain items, not affecting increase in net assets, in the prior year have been reclassified to conform to the current year presentation.

**NOTE 14. SUBSEQUENT EVENTS**

Management has evaluated subsequent events through December 21, 2015, the date that the financial statements were available for issue.

**STATE FINANCIAL ASSISTANCE**

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

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**JUNE 30, 2015**

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REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

INDEPENDENT AUDITOR'S REPORT

Venman & Co. LLC
Certified Public Accountants

December 21, 2015

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Shelton, Connecticut 06484
203-929-9945
Fax 203-929-9095
www.venmanllc.com

Board of Directors
New Beginnings Family Academy, Inc.
184 Garden Street
Bridgeport, CT 06605

Members

- Bernhard F. Bruder, CPA
James G. Woods, CPA
Janet Barillari, CPA

Of Counsel

- Russell P. Stockman, CPA

Services

- Financial Statements
Federal and State Tax Compliance
Income Tax Planning
Compensation & Benefit Planning
Banking Relationships
Investment Alternatives
Estate Planning & Valuation
Management Transition
Mergers & Acquisitions

Affiliations

- American Institute of
Certified Public Accountants
Connecticut Society of
Certified Public Accountants

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States the financial statements of New Beginnings Family Academy, Inc. (NBFA), which comprise the statement of financial position as of June 30, 2015 and the related statements of activities, and cash flows for the year then ended, and the related notes to financial statements, and have issued our report thereon dated December 21, 2015.

Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered NBFA's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of NBFA's internal control. Accordingly, we do not express an opinion on the effectiveness of NBFA's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A significant deficiency is a deficiency, or combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether NBFA's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts.



However, providing an opinion on compliance with those provisions was not an objective of our audit, and, accordingly, we do not express such an opinion. The results of our tests disclosed an instance of noncompliance that is required to be reported under *Government Auditing Standards*; which is described in the accompanying schedule of findings and questioned costs as item 2015-01.

**NBFA's Response to Finding**

NBFA's response to the finding identified in our audit is described in the accompanying schedule of findings and questioned costs. NBFA's response was not subjected to the auditing procedures applied in the audit of the financial statements and, accordingly, we express no opinion on it.

**Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the result of that testing, and not to provide an opinion on the effectiveness of NBFA's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering NBFA's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Venman + Co LLC



**REPORT ON COMPLIANCE FOR EACH MAJOR STATE PROGRAM; REPORT ON INTERNAL CONTROL OVER COMPLIANCE; AND REPORT ON THE SCHEDULE OF EXPENDITURES OF STATE FINANCIAL ASSISTANCE REQUIRED BY THE STATE SINGLE AUDIT ACT**

**INDEPENDENT AUDITOR’S REPORT**

**Venman & Co. LLC**  
Certified Public Accountants

December 21, 2015

375 Bridgeport Avenue  
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Board of Directors  
New Beginnings Family Academy, Inc.  
184 Garden Street  
Bridgeport, CT 06605

**Report on Compliance for Each Major State Program**

We have audited New Beginnings Family Academy, Inc.’s (NBFA) compliance with the types of compliance requirements described in the Office of Policy and Management’s *Compliance Supplement* that could have a direct and material effect on each of NBFA’s major state programs for the year ended June 30, 2015. NBFA’s major state programs are identified in the summary of auditors’ results section of the accompanying schedule of findings and questioned costs.

**Members**

- Bernhard F. Bruder, CPA
- James G. Woods, CPA
- Janet Barillari, CPA

**Management’s Responsibility**

Management is responsible for compliance with the requirements of laws, regulations, contracts and grants applicable to its state programs.

**Of Counsel**

- Russell P. Stockman, CPA

**Auditors’ Responsibility**

Our responsibility is to express an opinion on compliance for each of NBFA’s major state programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the State Single Audit Act (C.G.S. Sections 4-230 to 4-236). Those standards and the State Single Audit Act require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major state program occurred. An audit includes examining, on a test basis, evidence about NBFA’s compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

**Services**

- Financial Statements
- Federal and State Tax Compliance
- Income Tax Planning
- Compensation & Benefit Planning
- Banking Relationships
- Investment Alternatives
- Estate Planning & Valuation
- Management Transition
- Mergers & Acquisitions

We believe that our audit provides a reasonable basis for our opinion on compliance for each major state program. However, our audit does not provide a legal determination of NBFA’s compliance.

**Affiliations**

- American Institute of Certified Public Accountants
- Connecticut Society of Certified Public Accountants

**Opinion on Each Major State Program**

In our opinion, NBFA complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major state program for the year ended June 30, 2015.



### *Other Matters*

The results of our auditing procedures disclosed an instance of noncompliance, which is required to be reported in accordance with the State Single Audit Act and which is described in the accompanying schedule of findings and questioned costs as item 2015-01. Our opinion on each major state program is not modified with respect to this matter.

NBFA's response to the noncompliance finding identified in our audit is described in the accompanying schedule of findings and questioned costs. NBFA's response was not subjected to the auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

### **Report on Internal Control over Compliance**

Management of NBFA is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered NBFA's internal control over compliance with the types of requirements that could have a direct and material effect on each major state program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on compliance for each major state program and to test and report on internal control over compliance in accordance with the State Single Audit Act, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of NBFA's internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a state program on a timely basis. A material weakness in internal control over compliance is a deficiency, or combination of deficiencies, in internal control over compliance such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a state program will not be prevented, or detected and corrected, on a timely basis. A significant deficiency in internal control over compliance is a deficiency, or combination of deficiencies, in internal control over compliance with a type of compliance requirement of a state program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies, and, therefore, material weaknesses or significant deficiencies may exist that were not identified. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, we identified a deficiency in internal control over compliance, as described in the accompanying schedule of findings and questioned costs as item 2015-01 that we consider to be a significant deficiency.

NBFA's response to the internal control over compliance finding identified in our audit is described in the accompanying schedule of findings and questioned costs. NBFA's response was not subjected to the auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.



The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the State Single Audit Act. Accordingly, this report is not suitable for any other purpose.

**Report on Schedule of Expenditures of State Financial Assistance Required by the State Single Audit Act**

We have audited the financial statements of NBFA, as of and for the year ended June 30, 2015 and have issued our report thereon dated December 21, 2015, which contained an unmodified opinion on those financial statements. Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of state financial assistance is presented for purposes of additional analysis as required by the State Single Audit Act and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of state financial assistance is fairly stated in all material respects in relation to the financial statements as a whole.

Venman + Co LLC

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

**SCHEDULE OF EXPENDITURES OF STATE FINANCIAL ASSISTANCE**

**YEAR ENDED JUNE 30, 2015**

<u>STATE GRANTOR PASS-THROUGH GRANTOR PROGRAM TITLE</u>	<u>STATE GRANT PROGRAM CORE-CT NUMBER</u>	<u>EXPENDITURES</u>
<b>Department of Education</b>		
Passed through City of Bridgeport:		
Charter Schools	11000-SDE64000-17041	\$ 5,170,000
Direct:		
Charter School Building Project and Improvements	12052-SDE64000-43003	608,084
Healthy Foods Initiative	11000-SDE64000-16212	5,858
Child Nutrition State Matching Grant	11000-SDE64000-16211	2,855
State School Breakfast	11000-SDE64000-17046	3,505
<b>Department of Emergency Services and Public Protection</b>		
School Security Competitive Grant Program	12052-DPS32161-43546	<u>104,745</u>
<b>TOTAL STATE FINANCIAL ASSISTANCE</b>		<u><u>\$ 5,895,047</u></u>

**NOTE TO SCHEDULE**

The accompanying schedule of expenditures of state financial assistance includes state grant activity of New Beginnings Family Academy, Inc. (NBFA) under programs of the State of Connecticut for the fiscal year ended June 30, 2015. Various departments of the State of Connecticut have provided financial assistance through grants and other authorizations in accordance with the General Statutes of the State of Connecticut. These financial assistance programs fund the Charter School.

**1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

The accounting policies of NBFA conform to accounting principles generally accepted in the United States of America as applicable to not-for-profit organizations.

The information in the Schedule of Expenditures of State Financial Assistance is presented based upon regulations established by the State of Connecticut, Office of Policy and Management.

**Basis of Accounting**

The expenditures reported on the Schedule of Expenditures of State Financial Assistance are reported on the accrual basis of accounting. In accordance with Section 4-236-22 of the Regulations to the State Single Audit Act, certain grants are not dependent on expenditure activity, and accordingly, are considered to be expended in the fiscal year of receipt. These grant program receipts are reflected in the expenditures column of the Schedule of Expenditures of State Financial Assistance.

NEW BEGINNINGS FAMILY ACADEMY, INC.

SCHEDULE OF FINDINGS AND QUESTIONED COSTS

YEAR ENDED JUNE 30, 2015

I. SUMMARY OF AUDITOR'S RESULTS

*Financial Statements*

Type of auditor's opinion issued: Unmodified

Internal control over financial reporting:

- Material weakness(es) identified?  yes  no
- Significant deficiency(ies) identified?  yes  none reported
- Noncompliance material to financial statements noted?  yes  no

*State Financial Assistance*

Internal control over major programs:

- Material weakness(es) identified?  yes  no
- Significant deficiency(ies) identified?  yes  none reported

Type of auditor's opinion issued on compliance for major programs: Unmodified

Any audit findings disclosed that are required to be reported in accordance with Section 4-236-24 of the Regulations to the State Single Audit Act?  yes  no

- The following schedule reflects the major programs included in the audit:

<u>State Grantor and Program</u>	<u>State Core-CT Number</u>	<u>Expenditures</u>
Department of Education		
Charter Schools	11000-SDE64000-17041	\$ 5,170,000
Charter School Building Project and Improvements	12052-SDE64000-43003	<u>608,084</u>
		<u>\$ 5,778,084</u>

- Dollar threshold used to distinguish between type A and type B programs \$ 200,000

II. FINANCIAL STATEMENT FINDINGS

- There were no findings related to the financial statements for which *Government Accounting Standards* requires reporting.

NEW BEGINNINGS FAMILY ACADEMY, INC.  
SCHEDULE OF FINDINGS AND QUESTIONED COSTS  
YEAR ENDED JUNE 30, 2015

**III. STATE FINANCIAL ASSISTANCE FINDINGS AND QUESTIONED COSTS**

**Finding #2015-01**

**Criteria:** NBFA must be in compliance with certain provisions of laws, regulations, contracts, and grant agreements. Connecticut General Statutes 10-145(2) requires that all teachers, supervisors, administrators, special staff members or school superintendent employed by the school must possess an appropriate state certificate prior to the first day of employment.

**Condition:** During fiscal 2015 NBFA had employees without proper certification credentials.

**Context:** 3 out of 43 teachers and administrators tested were not certified in their content areas.

**Effect:** NBFA funds these positions with non-governmental funds; however, the State Board of Education may still levy fines or withhold State funding.

**Cause:** Current policies and procedures do not provide adequate oversight of compliance with this regulation.

**Recommendation:** NBFA should ensure compliance with Connecticut General Statutes 10-145(2).

**Views of Responsible Officials and Planned Corrective Actions:**

**Management Response:** Management agrees with the finding that uncertified teachers were employed by the school.

**Planned Corrective Actions:** NBFA has always sought the best individuals to teach its students. To that end, some individuals have been the best fit for the school but need assistance in securing proper certification in the State of Connecticut.

Current status of improperly certified staff:

1. Two teachers had a two month gap of being non-certified; they are currently certified.
2. One teacher had a three month gap of being non-certified; she is currently certified.

**NEW BEGINNINGS FAMILY ACADEMY, INC.**  
**SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS**  
**YEAR ENDED JUNE 30, 2015**

**Finding #2014-01**

**Condition:**

NBFA did not comply with the Connecticut Board of Education resolution governing their charter renewal requiring teachers and administrators to have proper certification in their content areas.

**Current Status:**

1. One teacher is currently certified.
2. One teacher has passed all examinations and has applied for certification.

**NEW BEGINNINGS FAMILY ACADEMY, INC.**  
**ACTUAL / BUDGET**  
**BALANCE SHEETS**  
**AS OF JUNE 30, 2016**

	<u>ACTUAL 6/30/2016</u>	<u>ACTUAL 6/30/2015</u>	<u>CHANGE</u>
<b>ASSETS</b>			
Cash	\$ 833,575	\$ 699,392	134,183
Grants Receivable	95,807	165,629	(69,822)
Other Receivables	250,546	221,105	29,441
Prepaid Expenses	82,297	73,921	8,376
Due from related party	-	12,221	(12,221)
Interest in Friends of NBFA	1,938,000	1,938,000	0
Equipment and Leasehold Improvements			-
Furniture and equipment	765,990	700,790	65,200
Leasehold improvements	3,140,872	3,095,324	45,548
Construction in Progress	-	-	-
Total	<u>3,906,862</u>	<u>3,796,114</u>	110,748
Less accumulated depreciation	<u>(1,431,840)</u>	<u>(1,139,306)</u>	(292,534)
Net Equipment and Leasehold Improvements	<u>2,475,022</u>	<u>2,656,808</u>	(181,786)
<b>TOTAL ASSETS</b>	<b><u>\$ 5,675,247</u></b>	<b><u>\$ 5,767,076</u></b>	<b>(91,829)</b>
<b>LIABILITIES AND NET ASSETS</b>			
<b>Liabilities</b>			
Accounts Payable	\$ 51,574	\$ 56,102	(4,528)
Accrued Expenses	<u>432,211</u>	<u>443,654</u>	-
<b>Total Liabilities</b>	<b><u>483,785</u></b>	<b><u>499,756</u></b>	<b>(15,971)</b>
<b>Net Assets</b>			
Unrestricted	3,253,463	3,329,320	(75,857)
Temporarily Restricted	<u>1,938,000</u>	<u>1,938,000</u>	-
<b>Total Net Assets</b>	<b><u>5,191,463</u></b>	<b><u>5,267,320</u></b>	<b>(75,857)</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b><u>\$ 5,675,247</u></b>	<b><u>\$ 5,767,076</u></b>	<b>(91,829)</b>

**NEW BEGINNINGS FAMILY ACADEMY, INC.**  
**INCOME STATEMENT**  
**FOR THE YEAR ENDED JUNE 30, 2016**

	Final Approved		Budget vs Actual		Proposed	
	Actual 2015-2016	Budget 2015-2016	\$ Inc. (Dec.) 2015-2016	\$ Inc. (Dec.) 2015-2016	Budget 2016-2017	Budget 2016-2017
<b>INCOME</b>						
Per Pupil	\$ 5,467,000	\$ 5,467,000	\$ -	\$ -	\$ 5,467,000	\$ 5,467,000
Titles I to V	250,308	185,000	65,308	65,308	250,000	250,000
State Grants	10,170	13,500	(3,330)	(3,330)	11,000	11,000
City of Bridgeport In-Services	49,440	49,440	-	-	49,440	49,440
City of Bridgeport Reimbursement of SPED Salaries	143,000	190,931	(47,931)	(47,931)	186,000	186,000
Meal Reimbursements						
Parents	28,554	29,000	(446)	(446)	-	-
Breakfast	97,579	123,350	(25,771)	(25,771)	197,806	197,806
Lunch	235,272	225,056	10,216	10,216	259,330	259,330
Snack	48,263	52,585	(4,322)	(4,322)	50,400	50,400
Other	53,461	25,000	28,461	28,461	50,000	50,000
Total Meal Reimbursements	463,129	454,991	8,138	8,138	557,536	557,536
Federal contribution to internet & telecommunications through USAC Development	26,115	26,115	0	0	22,630	22,630
Student Activity Fees, Staff Activities, Merchandise, Interest, Reserve	1,093,636	875,000	218,636	218,636	1,500,000	1,500,000
Change in Interest in Friends	15,074	9,000	6,074	6,074	52,300	52,300
	-	(9,600)	9,600	9,600	(9,000)	(9,000)
<b>TOTAL INCOME</b>	<b>7,517,872</b>	<b>7,261,377</b>	<b>248,357</b>	<b>248,357</b>	<b>8,086,906</b>	<b>8,086,906</b>
<b>EXPENDITURES</b>						
Salaries and Benefits						
Teachers	1,830,810	1,872,770	(41,960)	(41,960)	1,937,833	1,937,833
Instructional Assistants	610,078	656,742	(46,664)	(46,664)	843,640	843,640
STRETCH Program	158,023	141,876	16,147	16,147	226,150	226,150
Support Services	315,506	398,193	(82,687)	(82,687)	266,620	266,620
Substitutes	57,989	41,200	16,789	16,789	78,490	78,490
Maintenance & Cafeteria	185,352	183,446	1,906	1,906	185,000	185,000
Office Support	300,615	138,511	162,104	162,104	393,670	393,670
Administration	746,456	854,350	(107,894)	(107,894)	753,680	753,680
Total Salaries and Wages	4,204,829	4,287,088	(82,259)	(82,259)	4,685,083	4,685,083
Payroll Taxes	299,716	271,345	28,371	28,371	333,948	333,948
Employee Benefits	1,148,359	905,797	242,562	242,562	899,280	899,280
Total Salaries and Benefits	5,652,904	5,464,230	188,674	188,674	5,918,311	5,918,311
Depreciation and Amortization	292,534	185,000	107,534	107,534	309,000	309,000
Total Meals	376,803	435,421	(58,618)	(58,618)	397,252	397,252
Total Subcontractors	287,090	195,705	91,385	91,385	136,400	136,400
Total Purchased Services	308,762	417,432	(108,670)	(108,670)	387,130	387,130
Total Facilities	383,757	409,259	(25,502)	(25,502)	401,030	401,030
Total Supplies	136,541	121,534	15,007	15,007	152,400	152,400
Total Other	155,416	127,656	27,760	27,760	384,885	384,885
<b>TOTAL EXPENDITURES</b>	<b>7,593,808</b>	<b>7,356,237</b>	<b>48,896</b>	<b>48,896</b>	<b>8,086,408</b>	<b>8,086,408</b>
<b>NET INCOME (LOSS)</b>	<b>\$ (75,936)</b>	<b>\$ (94,860)</b>	<b>\$ 199,461</b>	<b>\$ 199,461</b>	<b>\$ 498</b>	<b>\$ 498</b>

**NEW BEGINNINGS FAMILY ACADEMY  
STATEMENTS OF CASH FLOWS  
FOR THE YEAR ENDED JUNE 30, 2016  
BUDGET FOR YEAR ENDED JUNE 2016**

	<b>ACTUAL 2015-2016</b>	<b>APPROVED BUDGET 2015-2016</b>
<b>Operating Activities</b>		
Net Income (Loss)	\$ (75,936)	\$ (94,860)
Adjustments to reconcile increase in net assets to net cash provided (used) by operating activities:		
Depreciation and amortization	292,534	185,000
(Increase) decrease in net assets of Friends of New Beginnings Family Academy, Inc.	12,221	9,600
(Increase) decrease in:		
Grants receivable	69,822	43,455
Other receivables	(29,441)	
Prepaid expenses	(8,376)	(10,000)
Increase (decrease) in:		
Accounts payable	(4,528)	15,000
Accrued expenses	(11,443)	20,000
<b>Net cash provided (used) by operating activities</b>	<b>244,853</b>	<b>168,195</b>
<b>Investing activities</b>		
Cash used in acquisition of equipment and leasehold improvements	(95,328)	(190,882)
Payments for Pre-K construction	(15,342)	(17,728)
<b>Cash used by investing activities</b>	<b>(110,670)</b>	<b>(208,610)</b>
<b>Increase (decrease) in cash for the period</b>	<b>134,183</b>	<b>(40,415)</b>
Cash at beginning of period	699,392	699,393
<b>CASH AT END OF PERIOD</b>	<b>\$ 833,575</b>	<b>\$ 658,978</b>

**NEW BEGINNINGS FAMILY ACADEMY: Proposed 2016-17 BUDGET**

	Actual 12 Mo. YTD	Proposed Budget	Favorable (Unfavorable)	% Proposed budget vs. YTD
	2015-16	2016-17	2016-17	Estimated Totals 2016-17
<b>REVENUE</b>				
Per Pupil	5,467,000	5,467,000	-	0%
Titles I to V	250,308	250,000	(308)	0%
State Grants	10,170	11,000	830	8%
City of Bpt in-services	49,440	49,440	-	0%
SPED Reimburse-Bpt	143,000	186,000	43,000	30%
Meal Reimbursements			-	
Parents	28,554	-	(28,554)	-100%
Breakfast	97,579	197,806	100,227	103%
Lunch	235,272	259,330	24,058	10%
Snack	48,263	50,400	2,137	4%
Other	53,461	50,000	(3,461)	-6%
Total Meal Reimbursements	463,129	557,536	94,407	20%
E-Rate	26,115	22,630	(3,485)	-13%
Development	1,093,636	1,500,000	406,364	37%
Student and Parent Activity Fees	15,074	52,300	37,226	247%
Change in Interest in Friends	-	(9,000)	(9,000)	0%
<b>TOTAL REVENUE</b>	<b>7,517,872</b>	<b>8,086,906</b>	<b>(569,034)</b>	<b>8%</b>
<b>EXPENDITURES</b>				
Salaries and Benefits				
Teachers	1,830,810	1,937,833	107,023	6%
Instructional Assistants	610,078	843,640	233,562	38%
STRETCH hourly / After care	158,023	226,150	68,127	43%
Support Services	315,506	266,620	(48,886)	-15%
Substitutes	57,989	78,490	20,501	35%
Maintenance & Cafeteria	185,352	185,000	(352)	0%
Office Staff	300,615	368,670	68,055	23%
Administration	746,456	753,680	7,224	1%
Boost Academy	-	25,000	25,000	0%
<b>Total Salary</b>	<b>4,204,829</b>	<b>4,685,083</b>	<b>480,254</b>	<b>11%</b>
Payroll Taxes	299,716	333,948	34,232	11%
Employee Benefits	1,148,359	899,280	(249,079)	-22%
<b>Salaries and Benefits</b>	<b>5,652,904</b>	<b>5,918,311</b>	<b>265,406</b>	<b>5%</b>
Depreciation	292,534	309,000	16,466	6%
Breakfast	127,495	127,232	(263)	0%
Lunch	183,525	228,620	45,095	25%

## NEW BEGINNINGS FAMILY ACADEMY: Proposed 2016-17 BUDGET

	Actual 12 Mo. YTD	Proposed Budget	Favorable (Unfavorable)	% Proposed budget vs. YTD Estimated Totals
	2015-16	2016-17	2016-17	2016-17
	Snacks (incl. fruits, veggies)	65,783	41,400	(24,383)
<b>Total Meals</b>	<b>376,803</b>	<b>397,252</b>	<b>20,449</b>	<b>5%</b>
<b>Subcontractors</b>				
Legal	18,933	20,400	1,467	8%
Audit	66,365	65,000	(1,365)	-2%
Technology	72,636	45,000	(27,636)	-38%
E-Rate	5,000	5,000	-	0%
Stretch Enrichment Instructors	45,626	-	(45,626)	-100%
After School	-	-	-	0%
Pre-K Consultant	-	-	-	0%
Other	78,531	1,000	(77,531)	-99%
<b>Total Subcontractors</b>	<b>287,090</b>	<b>136,400</b>	<b>(150,690)</b>	<b>-52%</b>
Professional Development	79,697	175,000	95,303	120%
Alarm & Fire Systems	10,649	13,690	3,041	29%
City of Bridgeport Services	49,440	49,440	-	0%
Transportation	45,919	-	(45,919)	-100%
Printing and Marketing	531	500	(31)	-6%
Travel	2,336	3,500	1,164	50%
Field Trips	4,577	20,000	15,423	337%
Testing & Evaluation	4,905	5,000	95	2%
Outside Instructors - Other	2,124	-	(2,124)	-100%
Curriculum	25,856	25,000	(856)	-3%
Insurance	42,815	50,000	7,185	17%
Software	22,248	25,000	2,752	12%
Communications	17,664	20,000	2,336	13%
<b>Total Purchased Services</b>	<b>308,762</b>	<b>387,130</b>	<b>78,368</b>	<b>25%</b>
NBFA Lease	121,501	123,930	2,429	2%
Electricity	73,239	80,000	6,761	9%
Heat	10,918	14,000	3,082	28%
Water	10,320	12,000	1,680	16%
Trash Removal	15,688	16,500	812	5%
Repairs & Maintenance	42,867	43,000	133	0%
Exterminator	1,607	1,600	(7)	0%
Cleaning Service	96,592	95,000	(1,592)	-2%
Landscaping & Snowplowing	11,025	15,000	3,975	36%
<b>Total Facilities</b>	<b>383,757</b>	<b>401,030</b>	<b>17,273</b>	<b>5%</b>
<b>Instructional Supplies</b>				
Art / Music	3,372	3,300	(72)	-2%
Reading, Lang Arts, Math, Sci	6,189	15,000	8,811	142%
Physical Education	2,144	1,800	(344)	-16%
Library	1,607	3,300	1,693	105%
Pre-K	12,212	10,000	(2,212)	-18%
Classroom/General Supplies	72,821	80,000	7,179	10%
Custodial	29,124	30,000	876	3%
Cafeteria	9,072	9,000	(72)	-1%
<b>Total Supplies</b>	<b>136,541</b>	<b>152,400</b>	<b>15,859</b>	<b>12%</b>
Machine Rentals	3,136	-	(3,136)	-100%

**NEW BEGINNINGS FAMILY ACADEMY: Proposed 2016-17 BUDGET**

	Actual 12 Mo. YTD	Proposed Budget	Favorable (Unfavorable)	% Proposed budget vs. YTD Estimated Totals
	2015-16	2016-17	2016-17	2016-17
Interest Charges	3,781	2,000	(1,781)	-47%
Dues & Subscriptions	21,324	10,000	(11,324)	-53%
Bank Fees	1,064	2,000	936	88%
Payroll Service	14,372	17,000	2,628	18%
Staff Recruiting	7,873	8,000	127	2%
Instructional Equipment/Mach Rentals	39,969	50,000	10,031	25%
Property Taxes	100	100	-	0%
Development	24,572	127,000	102,428	417%
Student Activities	10,438	12,000	1,562	15%
Staff Activities	5,747	5,000	(747)	-13%
Meetings	2,348	1,000	(1,348)	-57%
School Store	-	-	-	0%
Cafeteria Equipment	995	1,000	5	1%
Miscellaneous	19,698	1,000	(18,698)	-95%
Awards & Scholarships	-	-	-	0%
Bad Debts	-	-	-	0%
<b>Total Other</b>	<b>155,416</b>	<b>236,100</b>	<b>80,684</b>	<b>52%</b>
<b>Total STRETCH and Boost non-personnel</b>	<b>-</b>	<b>148,785</b>	<b>148,785</b>	
<b>TOTAL EXPENDITURES</b>	<b>7,593,808</b>	<b>8,086,408</b>	<b>492,600</b>	<b>6%</b>
<b>NET INCOME(LOSS)</b>	<b>(75,936)</b>	<b>498</b>	<b>76,435</b>	
<b>NET CASH FLOW</b>				
Net Income (Loss)	(75,936)	498	76,435	-101%
less: Capital Ex - Pre-K	(15,342)	-	15,342	
less: Capital Ex - other	(95,406)	(350,000)	(254,594)	
Plus: Depreciation	292,534	309,000	16,466	6%
Changes in Working Capital	28,333	-	(28,333)	-100%
<b>NET CASH FLOW</b>	<b>134,183</b>	<b>(40,502)</b>	<b>(174,684)</b>	
<b>CASH BALANCES</b>				
Beginning of Year	699,392	833,575		
End of Period	833,575	793,073		
Change	134,183	(40,502)		

**Fixed Asset Additions Schedule**

2015-2016		2016-2017	
Equipment and leasehold improvements			
Equipment	\$65,200	Equipment	\$50,000
Vestibule doors and security	<u>30,117</u>	Summer Construction	
	95,317	Architect	20,000
		Contractor	280,000
			<u>350,000</u>
Payment for Pre-K Construction			
courtyard gate and security	<u>15,431</u>		<u>0</u>
	<u>\$110,748</u>		<u>\$350,000</u>

Form **990**

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

**2014**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.  
Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**A For the 2014 calendar year, or tax year beginning JUL 1, 2014 and ending JUN 30, 2015**

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C Name of organization</b> NEW BEGINNINGS FAMILY ACADEMY, INC. Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite 184 GARDEN STREET City or town, state or province, country, and ZIP or foreign postal code BRIDGEPORT, CT 06605 <b>F Name and address of principal officer:</b> RONELLE SWAGERTY SAME AS C ABOVE	<b>D Employer identification number</b> 06-1578214 <b>E Telephone number</b> (203) 384-2897 <b>G Gross receipts \$</b> 7,803,078. <b>H(a) Is this a group return for subordinates?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b) Are all subordinates included?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) <b>H(c) Group exemption number</b>
<b>I Tax-exempt status:</b> <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
<b>J Website:</b> WWW.NBFACADEMY.ORG		
<b>K Form of organization:</b> <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		
<b>L Year of formation:</b> 1999		<b>M State of legal domicile:</b> CT

**Part I Summary**

<b>Activities &amp; Governance</b>	1 Briefly describe the organization's mission or most significant activities: <b>TO OPERATE A CHARTER SCHOOL WITH FULL DAY KINDERGARTEN &amp; GRADES 1-8 WITH AN EMPHASIS ON COMBINING</b> 2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets. 3 Number of voting members of the governing body (Part VI, line 1a) ..... <b>3</b> 15 4 Number of independent voting members of the governing body (Part VI, line 1b) ..... <b>4</b> 12 5 Total number of individuals employed in calendar year 2014 (Part V, line 2a) ..... <b>5</b> 105 6 Total number of volunteers (estimate if necessary) ..... <b>6</b> 20 7a Total unrelated business revenue from Part VIII, column (C), line 12 ..... <b>7a</b> 0. 7b Net unrelated business taxable income from Form 990-T, line 34 ..... <b>7b</b> 0.	
<b>Revenue</b>	8 Contributions and grants (Part VIII, line 1h) ..... <b>5,541,796.</b> <b>Prior Year</b> 9 Program service revenue (Part VIII, line 2g) ..... <b>0.</b> <b>Current Year</b> 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) ..... <b>&lt;994.&gt;</b> <b>&lt;369.&gt;</b> 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) ..... <b>205,444.</b> <b>163,458.</b> 12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) ..... <b>5,746,246.</b> <b>7,707,365.</b>	
<b>Expenses</b>	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) ..... <b>0.</b> 14 Benefits paid to or for members (Part IX, column (A), line 4) ..... <b>0.</b> 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) ..... <b>4,221,303.</b> <b>4,885,930.</b> 16a Professional fundraising fees (Part IX, column (A), line 11e) ..... <b>0.</b> <b>0.</b> 16b Total fundraising expenses (Part IX, column (D), line 25) ..... <b>0.</b> 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) ..... <b>1,394,263.</b> <b>1,574,922.</b> 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) ..... <b>5,615,566.</b> <b>6,460,852.</b> 19 Revenue less expenses. Subtract line 18 from line 12 ..... <b>130,680.</b> <b>1,246,513.</b>	
<b>Net Assets or Fund Balances</b>	20 Total assets (Part X, line 16) ..... <b>4,947,366.</b> <b>Beginning of Current Year</b> 21 Total liabilities (Part X, line 26) ..... <b>931,605.</b> <b>End of Year</b> 22 Net assets or fund balances. Subtract line 21 from line 20 ..... <b>4,015,761.</b> <b>5,267,320.</b>	

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer _____ Date _____	
	Type or print name and title _____	
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>JAMES G. WOODS</b>	Preparer's signature _____ Date _____ Check if self-employed <input type="checkbox"/> PTIN <b>P01429665</b>
	Firm's name <b>VENMAN &amp; CO. LLC, CPA'S</b> Firm's address <b>375 BRIDGEPORT AVENUE SHELTON, CT 06484</b>	Firm's EIN <b>06-0674034</b> Phone no. <b>203-929-9945</b>

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission: TO OPERATE A CHARTER SCHOOL WITH FULL DAY PRE-K, KINDERGARTEN, AND GRADES 1-8 WITH AN EMPHASIS ON COMBINING ACADEMIC STANDARDS & PROMOTING A POSITIVE SELF IMAGE.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

4a (Code: ) (Expenses \$ 5,162,074. including grants of \$ ) (Revenue \$ ) OPERATION OF A CHARTER SCHOOL PROVIDING FULL DAY PRE-K, KINDERGARTEN, AND GRADES ONE THROUGH EIGHT

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe in Schedule O.) (Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 5,162,074.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i> .....	<b>1</b> X	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? .....	<b>2</b> X	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> .....	<b>3</b>	X
<b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> .....	<b>4</b>	X
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i> .....	<b>5</b>	X
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i> .....	<b>6</b>	X
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> .....	<b>7</b>	X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> .....	<b>8</b>	X
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i> .....	<b>9</b>	X
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i> .....	<b>10</b>	X
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> .....	<b>11a</b> X	
<b>b</b> Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i> .....	<b>11b</b>	X
<b>c</b> Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i> .....	<b>11c</b>	X
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i> .....	<b>11d</b> X	
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> .....	<b>11e</b>	X
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i> .....	<b>11f</b>	X
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> .....	<b>12a</b> X	
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> .....	<b>12b</b>	X
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> .....	<b>13</b> X	
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? .....	<b>14a</b>	X
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i> .....	<b>14b</b>	X
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i> .....	<b>15</b>	X
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i> .....	<b>16</b>	X
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i> .....	<b>17</b>	X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> .....	<b>18</b> X	
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i> .....	<b>19</b>	X
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> .....	<b>20a</b>	X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? .....	<b>20b</b>	

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i> .....		X
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....		X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....		X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....		
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....		X
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i> .....		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....	X	
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....		X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? .....	X	

**Note.** All Form 990 filers are required to complete Schedule O .....

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

Input box for Schedule O check

Table with columns for question numbers (1a-14b), Yes, and No. Contains various tax compliance questions and their corresponding 'Yes' or 'No' responses.

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI [X]

Section A. Governing Body and Management

Table with 5 columns: Question, 1a, 1b, Yes, No. Rows include questions about voting members, family relationships, management delegation, and governance decisions.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 5 columns: Question, Yes, No. Rows include questions about local chapters, conflict of interest policies, whistleblower policies, and compensation review.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed NONE
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection.
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records: JAMES PAGE - (203) 384-2897 184 GARDEN STREET, BRIDGEPORT, CT 06605

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) RICHARD BENTLEY DIRECTOR	4.00	X					0.	0.	0.	
(2) CLAIRE FOERSTER BERNSTIEN VICE PRESIDENT	4.00	X		X			0.	0.	0.	
(3) KEVIN KNIGHT DIRECTOR	1.00	X					0.	0.	0.	
(4) DANIELLE SMITH DIRECTOR	1.00	X					0.	0.	0.	
(5) VERLETHA SANTIAGO DIRECTOR	1.00	X					0.	0.	0.	
(6) STACY RUEBENACKER DIRECTOR	1.00	X					0.	0.	0.	
(7) DAVID SCHLAKMAN PRESIDENT	4.00	X		X			0.	0.	0.	
(8) DANIELLE DESMARAI DIRECTOR	37.50	X					37,291.	0.	3,998.	
(9) PAUL MYERSON TREASURER	4.00	X		X			0.	0.	0.	
(10) LISA CALLAHAN DIRECTOR	4.00	X					0.	0.	0.	
(11) KATHERINE HABANSKY DIRECTOR	37.50	X					55,830.	0.	16,917.	
(12) MARY HUMPHRIES DIRECTOR	37.50	X					85,598.	0.	7,201.	
(13) DAVID E. HUNTER DIRECTOR	4.00	X					0.	0.	0.	
(14) SABITA KANHAI DIRECTOR	1.00	X					0.	0.	0.	
(15) CHRISTINE KING SECRETARY	1.00	X		X			0.	0.	0.	
(16) RONELLE P. SWAGERTY CEO	37.50			X			143,369.	0.	17,643.	
(17) THOMAS LUPINSKI OPERATIONS MANAGER	37.50			X			88,149.	0.	17,601.	



**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns .....	<b>1a</b>					
	<b>b</b> Membership dues .....	<b>1b</b>					
	<b>c</b> Fundraising events .....	<b>1c</b>	282,250.				
	<b>d</b> Related organizations .....	<b>1d</b>	9,046.				
	<b>e</b> Government grants (contributions) .....	<b>1e</b>	6,381,512.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above .....	<b>1f</b>	871,468.				
	<b>g</b> Noncash contributions included in lines 1a-1f: \$ .....						
	<b>h Total.</b> Add lines 1a-1f .....		7,544,276.				
	<b>Program Service Revenue</b>	<b>2 a</b> _____	<b>Business Code</b>				
<b>b</b> _____							
<b>c</b> _____							
<b>d</b> _____							
<b>e</b> _____							
<b>f</b> All other program service revenue .....							
<b>g Total.</b> Add lines 2a-2f .....							
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....		97.			97.	
	<b>4</b> Income from investment of tax-exempt bond proceeds .....						
	<b>5</b> Royalties .....						
	<b>6 a</b> Gross rents .....	(i) Real	(ii) Personal				
		<b>b</b> Less: rental expenses .....					
		<b>c</b> Rental income or (loss) .....					
		<b>d</b> Net rental income or (loss) .....					
	<b>7 a</b> Gross amount from sales of assets other than inventory .....	(i) Securities	(ii) Other				
		<b>b</b> Less: cost or other basis and sales expenses .....		2,000.			
		<b>c</b> Gain or (loss) .....		2,466.			
		<b>d</b> Net gain or (loss) .....		<466.>			<466.>
	<b>8 a</b> Gross income from fundraising events (not including \$ 282,250. of contributions reported on line 1c). See Part IV, line 18 .....	<b>a</b>		24,500.			
		<b>b</b> Less: direct expenses .....	<b>b</b>	93,247.			
		<b>c</b> Net income or (loss) from fundraising events .....		<68,747.>			<68,747.>
	<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....	<b>a</b>					
<b>b</b> Less: direct expenses .....		<b>b</b>					
<b>c</b> Net income or (loss) from gaming activities .....							
<b>10 a</b> Gross sales of inventory, less returns and allowances .....	<b>a</b>						
	<b>b</b> Less: cost of goods sold .....	<b>b</b>					
	<b>c</b> Net income or (loss) from sales of inventory .....						
Miscellaneous Revenue		<b>Business Code</b>					
<b>11 a</b> MISCELLANEOUS .....		900099	232,205.	232,205.			
<b>b</b> _____							
<b>c</b> _____							
<b>d</b> All other revenue .....							
<b>e Total.</b> Add lines 11a-11d .....			232,205.				
<b>12 Total revenue.</b> See instructions. .....			7,707,365.	232,205.	0.	<69,116.>	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	503,703.	178,719.	324,984.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	3,332,507.	2,766,700.	565,807.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	802,153.	615,888.	186,265.	
10 Payroll taxes	247,567.	190,081.	57,486.	
11 Fees for services (non-employees):				
a Management				
b Legal	1,990.		1,990.	
c Accounting	28,315.		28,315.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	103,166.	82,732.	20,434.	
12 Advertising and promotion				
13 Office expenses	283,998.	271,671.	12,327.	
14 Information technology	99,057.	30,206.	68,851.	
15 Royalties				
16 Occupancy	412,035.	412,035.		
17 Travel	14,521.	13,472.	1,049.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	150,201.	143,505.	6,696.	
23 Insurance	68,675.	52,107.	16,568.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <b>FOOD SERVICE</b>	313,511.	313,511.		
b <b>STUDENT ACTIVITIES</b>	64,527.	64,527.		
c <b>OTHER FEES</b>	16,824.	9,520.	7,304.	
d <b>OTHER ACTIVITIES</b>	12,944.	12,822.	122.	
e All other expenses	5,158.	4,578.	580.	
25 <b>Total functional expenses.</b> Add lines 1 through 24e	6,460,852.	5,162,074.	1,298,778.	0.
26 <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here  if following SOP 98-2 (ASC 958-720)

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	1,490,072.	<b>1</b>	699,392.
	<b>2</b> Savings and temporary cash investments .....		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net .....	47,996.	<b>3</b>	165,629.
	<b>4</b> Accounts receivable, net .....		<b>4</b>	
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	151,039.	<b>9</b>	73,921.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 3,796,114.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 1,139,306.	1,046,960.	<b>10c</b> 2,656,808.
	<b>11</b> Investments - publicly traded securities .....		<b>11</b>	
	<b>12</b> Investments - other securities. See Part IV, line 11 .....		<b>12</b>	
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....	2,211,299.	<b>15</b>	2,171,326.
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) .....	4,947,366.	<b>16</b>	5,767,076.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	593,037.	<b>17</b>	499,756.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....	338,568.	<b>19</b>	0.
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....		<b>25</b>	
	<b>26 Total liabilities.</b> Add lines 17 through 25 .....	931,605.	<b>26</b>	499,756.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117 (ASC 958), check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 29, and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets .....	1,699,595.	<b>27</b>	3,329,320.
	<b>28</b> Temporarily restricted net assets .....	2,316,166.	<b>28</b>	1,938,000.
	<b>29</b> Permanently restricted net assets .....		<b>29</b>	
	<b>Organizations that do not follow SFAS 117 (ASC 958), check here</b> <input type="checkbox"/> <b>and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds .....		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>32</b>	
<b>33</b> Total net assets or fund balances .....	4,015,761.	<b>33</b>	5,267,320.	
<b>34</b> Total liabilities and net assets/fund balances .....	4,947,366.	<b>34</b>	5,767,076.	

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	7,707,365.
2	Total expenses (must equal Part IX, column (A), line 25)	2	6,460,852.
3	Revenue less expenses. Subtract line 2 from line 1	3	1,246,513.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	4,015,761.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	5,046.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	5,267,320.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2b	Were the organization's financial statements audited by an independent accountant?	X	
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:			
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
3b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

Form 990 (2014)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
▶ Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

Open to Public Inspection

Name of the organization **NEW BEGINNINGS FAMILY ACADEMY, INC.** Employer identification number **06-1578214**

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations .....
  - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see Instructions)	(vi) Amount of other support (see Instructions)
			Yes	No		
<b>Total</b>						

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge ...						
<b>4 Total.</b> Add lines 1 through 3 .....						
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						
<b>6 Public support.</b> Subtract line 5 from line 4.						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
<b>7</b> Amounts from line 4 .....						
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources ...						
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on ...						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>11 Total support.</b> Add lines 7 through 10						
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2014 (line 6, column (f) divided by line 11, column (f)) .....	14	%
<b>15</b> Public support percentage from 2013 Schedule A, Part II, line 14 .....	15	%
<b>16a 33 1/3% support test - 2014.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>b 33 1/3% support test - 2013.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2014.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2013.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		<input type="checkbox"/>

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2013 Schedule A, Part III, line 15 .....	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2013 Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2014.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**b 33 1/3% support tests - 2013.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No" describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2) (B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations; (b) individuals that are part of the charitable class benefited by one or more of its supported organizations; or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer (b) below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
<b>11a</b>		
<b>b</b> A family member of a person described in (a) above?		
<b>11b</b>		
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in <b>Part VI</b> .		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
<b>1</b>		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
<b>2</b>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
<b>1</b>		

**Section D. Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>1</b>		
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).		
<b>2</b>		
<b>3</b> By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.		
<b>3</b>		

**Section E. Type III Functionally-Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):			
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.			
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.			
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a government entity (see instructions).			
<b>2</b> Activities Test. Answer (a) and (b) below.		Yes	No
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.			
<b>2a</b>			
<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.			
<b>2b</b>			
<b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.			
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in <b>Part VI</b> .			
<b>3a</b>			
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.			
<b>3b</b>			

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

1  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).		

**Part V** Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations	
<b>4</b> Amounts paid to acquire exempt-use assets	
<b>5</b> Qualified set-aside amounts (prior IRS approval required)	
<b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions.	
<b>7 Total annual distributions.</b> Add lines 1 through 6.	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions.	
<b>9</b> Distributable amount for 2014 from Section C, line 6	
<b>10</b> Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2014	(iii) Distributable Amount for 2014
<b>1</b> Distributable amount for 2014 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2014 (reasonable cause required-see instructions)			
<b>3</b> Excess distributions carryover, if any, to 2014:			
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> From 2013			
<b>f Total</b> of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2014 distributable amount			
<b>i</b> Carryover from 2009 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
<b>4</b> Distributions for 2014 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2014 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from 4.			
<b>5</b> Remaining underdistributions for years prior to 2014, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions).			
<b>6</b> Remaining underdistributions for 2014. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions).			
<b>7 Excess distributions carryover to 2015.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b> Excess from 2013			
<b>e</b> Excess from 2014			

Schedule A (Form 990 or 990-EZ) 2014



**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a  Public exhibition
- b  Scholarly research
- c  Preservation for future generations
- d  Loan or exchange programs
- e  Other \_\_\_\_\_

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII

**Part V Endowment Funds.** Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a Board designated or quasi-endowment  \_\_\_\_\_ %
- b Permanent endowment  \_\_\_\_\_ %
- c Temporarily restricted endowment  \_\_\_\_\_ %

The percentages in lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) unrelated organizations	3a(i)	
(ii) related organizations	3a(ii)	
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b	

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		3,095,324.	676,389.	2,418,935.
d Equipment		700,790.	462,917.	237,873.
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				<b>2,656,808.</b>

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely-held equity interests .....		
(3) Other .....		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) INTEREST IN NET ASSETS OF FRIENDS OF NBFA	1,938,000.
(2) OTHER RECEIVABLES	221,105.
(3) DUE FROM FRIENDS OF NEW BEGINNINGS	12,221.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	2,171,326.

**Part X Other Liabilities.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements	<b>1</b>	7,854,124.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
<b>a</b>	Net unrealized gains (losses) on investments	<b>2a</b>	
<b>b</b>	Donated services and use of facilities	<b>2b</b>	48,000.
<b>c</b>	Recoveries of prior year grants	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	98,759.
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	146,759.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	7,707,365.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	0.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.)	<b>5</b>	7,707,365.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements	<b>1</b>	6,602,099.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
<b>a</b>	Donated services and use of facilities	<b>2a</b>	48,000.
<b>b</b>	Prior year adjustments	<b>2b</b>	
<b>c</b>	Other losses	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	93,247.
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	141,247.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	6,460,852.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	0.
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.)	<b>5</b>	6,460,852.

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART XI, LINE 2D - OTHER ADJUSTMENTS:**

SPECIAL EVENTS - GALA	93,247.
CHANGE IN INTEREST IN NET ASSETS OF FRIENDS OF NBFA	5,046.
LOSS ON DISPOSAL OF EQUIPMENT	466.
<b>TOTAL TO SCHEDULE D, PART XI, LINE 2D</b>	<b>98,759.</b>

**PART XII, LINE 2D - OTHER ADJUSTMENTS:**

DEVELOPMENT GALA EXPENSES	93,247.
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**SCHEDULE E**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Schools**

▶ **Complete if the organization answered "Yes" to Form 990, Part IV, line 13,  
or Form 990-EZ, Part VI, line 48.**

▶ **Attach to Form 990 or Form 990-EZ.**

OMB No. 1545-0047

**2014**

**Open to Public  
Inspection**

▶ **Information about Schedule E (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**

Name of the organization

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

Employer identification number

**06-1578214**

**Part I**

	YES	NO
<b>1</b> Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body? .....	X	
<b>2</b> Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships? .....	X	
<b>3</b> Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II .....	X	
<b>THROUGH HANDBOOKS SENT TO STUDENTS AND PARENTS</b>		
<b>4</b> Does the organization maintain the following?		
<b>a</b> Records indicating the racial composition of the student body, faculty, and administrative staff? .....	X	
<b>b</b> Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? .....		X
<b>c</b> Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships? .....	X	
<b>d</b> Copies of all material used by the organization or on its behalf to solicit contributions? .....		X
If you answered "No" to any of the above, please explain. If you need more space, use Part II. <b>4B: NO SCHOLARSHIPS OR FINANCIAL ASSISTANCE HAVE BEEN AWARDED; 4D: NO MATERIALS WERE USED TO SOLICIT CONTRIBUTIONS</b>		
<b>5</b> Does the organization discriminate by race in any way with respect to:		
<b>a</b> Students' rights or privileges? .....		X
<b>b</b> Admissions policies? .....		X
<b>c</b> Employment of faculty or administrative staff? .....		X
<b>d</b> Scholarships or other financial assistance? .....		X
<b>e</b> Educational policies? .....		X
<b>f</b> Use of facilities? .....		X
<b>g</b> Athletic programs? .....		X
<b>h</b> Other extracurricular activities? .....		X
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
<b>6a</b> Does the organization receive any financial aid or assistance from a governmental agency? .....	X	
<b>b</b> Has the organization's right to such aid ever been revoked or suspended? .....		X
If you answered "Yes" to either line 6a or line 6b, explain on Part II.		
<b>7</b> Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," explain on Part II .....	X	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or Form 990-EZ.

Schedule E (Form 990 or 990-EZ) (2014)

**Part II** **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable.

Also provide any other additional information.

**LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:**

SEE ATTACHED SCHEDULE

COPY



**Part II Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

Revenue		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))	
		GALA (event type)	(event type)	NONE (total number)		
1	Gross receipts .....	306,750.			306,750.	
2	Less: Contributions .....	282,250.			282,250.	
3	Gross income (line 1 minus line 2) .....	24,500.			24,500.	
Direct Expenses	4	Cash prizes .....				
	5	Noncash prizes .....				
	6	Rent/facility costs .....	17,926.			17,926.
	7	Food and beverages .....				
	8	Entertainment .....	50,000.			50,000.
	9	Other direct expenses .....	25,321.			25,321.
10	Direct expense summary. Add lines 4 through 9 in column (d) .....				93,247.	
11	Net income summary. Subtract line 10 from line 3, column (d) .....				<68,747.>	

**Part III Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

Revenue		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
1	Gross revenue .....				
Direct Expenses	2	Cash prizes .....			
	3	Noncash prizes .....			
	4	Rent/facility costs .....			
	5	Other direct expenses .....			
	6	Volunteer labor .....	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No
7	Direct expense summary. Add lines 2 through 5 in column (d) .....				
8	Net gaming income summary. Subtract line 7 from line 1, column (d) .....				

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_  
 a Is the organization licensed to conduct gaming activities in each of these states?  Yes  No  
 b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?  Yes  No  
 b If "Yes," explain: \_\_\_\_\_





**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Name of the organization

NEW BEGINNINGS FAMILY ACADEMY, INC.

Employer identification number

06-1578214

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

ACADEMIC STANDARDS & PROMOTING A POSITIVE SELF IMAGE.

FORM 990, PART VI, SECTION B, LINE 11:

THE BOARD PRESIDENT AND TREASURER REVIEW THE FORM 990 BEFORE IT IS FILED.

FORM 990, PART VI, SECTION B, LINE 12C:

BOARD MEMBERS ARE REQUIRED TO DECLARE THEIR ASSOCIATION WITH ANY  
ORGANIZATION OR INDIVIDUAL CONSIDERED FOR PROVIDING GOODS OR SERVICES TO  
THE ACADEMY AND REFRAIN FROM DEBATING OR VOTING THEREON.

FORM 990, PART VI, SECTION C, LINE 19:

UPON REQUEST

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

CHANGE IN INTEREST IN NET ASSETS OF FRIENDS OF NBFA 5,046.

PART XII, LINE 2C

NO CHANGE FROM PRIOR YEAR.

FORM 990, PART VII

DIRECTOR DANIELLE DESMARAIS IS PAID AS A TEACHER, NOT AS A DIRECTOR.  
SHE IS A TEACHER REPRESENTATIVE ON THE BOARD.

FORM 990, PART VII

Name of the organization NEW BEGINNINGS FAMILY ACADEMY, INC.	Employer identification number 06-1578214
---	--

DIRECTOR KATHERINE HABANSKY IS PAID AS A TEACHER, NOT AS A DIRECTOR.  
SHE IS A TEACHER REPRESENTATIVE ON THE BOARD.

FORM 990, PART VII

DIRECTOR MARY HUMPHRIES IS PAID AS A TEACHER, NOT AS A DIRECTOR. SHE  
IS A TEACHER REPRESENTATIVE ON THE BOARD.



**SCHEDULE R  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

▶ Information about Schedule R (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2014**

Open to Public  
Inspection

Name of the organization

**NEW BEGINNINGS FAMILY ACADEMY, INC.**

Employer identification number

**06-1578214**

**Part I Identification of Disregarded Entities** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

**Part II Identification of Related Tax-Exempt Organizations** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
FRIENDS OF NEW BEGINNINGS FAMILY ACADEMY, INC. - 04-3733922, 184 GARDEN STREET, NO. 109, BRIDGEPORT, CT 06605	RAISE FUNDS WHICH ARE DONATED TO NBFA FOR ACTIVITIES & PROGRAMS	CONNECTICUT	501(C)(3)	TYPE III-FUNCT. IN	N/A		X

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2014

**Part III Identification of Related Organizations Taxable as a Partnership** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
N/A								X	N/A		X	

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
N/A									X

**Part V Transactions With Related Organizations** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
<b>1</b> During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
<b>a</b> Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity .....		X
<b>b</b> Gift, grant, or capital contribution to related organization(s) .....		X
<b>c</b> Gift, grant, or capital contribution from related organization(s) .....	X	
<b>d</b> Loans or loan guarantees to or for related organization(s) .....		X
<b>e</b> Loans or loan guarantees by related organization(s) .....		X
<b>f</b> Dividends from related organization(s) .....		X
<b>g</b> Sale of assets to related organization(s) .....		X
<b>h</b> Purchase of assets from related organization(s) .....		X
<b>i</b> Exchange of assets with related organization(s) .....		X
<b>j</b> Lease of facilities, equipment, or other assets to related organization(s) .....		X
<b>k</b> Lease of facilities, equipment, or other assets from related organization(s) .....	X	
<b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) .....		X
<b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) .....		X
<b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) .....		X
<b>o</b> Sharing of paid employees with related organization(s) .....		X
<b>p</b> Reimbursement paid to related organization(s) for expenses .....		X
<b>q</b> Reimbursement paid by related organization(s) for expenses .....		X
<b>r</b> Other transfer of cash or property to related organization(s) .....		X
<b>s</b> Other transfer of cash or property from related organization(s) .....		X

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) FRIENDS OF NEW BEGINNINGS FAMILY ACADEMY, INC	K	119,119.	BELOW FAIR MARKET RENT
(2) FRIENDS OF NEW BEGINNINGS FAMILY ACADEMY, INC	C	9,046.	CASH RECEIVED FROM SUPT ORG
(3)			
(4)			
(5)			
(6)			



**Part VII Supplemental Information**

Provide additional information for responses to questions on Schedule R (see instructions).

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# Application for Extension of Time To File an Exempt Organization Return

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**  
▶ **Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box  **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Electronic filing (e-file)** - You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

	Enter filer's identifying number	
<b>Type or print</b>	Name of exempt organization or other filer, see instructions. <b>NEW BEGINNINGS FAMILY ACADEMY, INC.</b>	Employer identification number (EIN) or <b>06-1578214</b>
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. <b>184 GARDEN STREET</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>BRIDGEPORT, CT 06605</b>	

Enter the Return code for the return that this application is for (file a separate application for each return)

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**JAMES PAGE**

- The books are in the care of ▶ **184 GARDEN STREET - BRIDGEPORT, CT 06605**  
Telephone No. ▶ **(203) 384-2897** Fax No. ▶ **(203) 384-2898**
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

**1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **FEBRUARY 15, 2016**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ▶  calendar year \_\_\_\_\_ or  
 ▶  tax year beginning **JUL 1, 2014**, and ending **JUN 30, 2015**.

**2** If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	0.
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	0.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.