

## AMENDMENT REQUEST

### Utah State Charter School Board

The Utah State Charter School Board (SCSB) is charged with authorizing, monitoring, evaluating, and dismissing charters of public schools in Utah. Its work is under the direct supervision of the Utah State Board of Education (USBE) per Utah Code 53A-1a-501.5.

Amendment requests, including all required attachments and supporting documentation, are due electronically in Microsoft Word format no later than three weeks prior to the upcoming State Charter School Board meeting. Incomplete requests will not be considered. A calendar of meetings is located at <http://schools.utah.gov/charterschools>.

1. Charter School Oquirrh Mountain Charter School
2. Street Address 1425 South Angel Street Phone (801) 593-8200
3. City Kaysville
4. This is a school located in an area: ☒ Rural ☐ Urban
5. Chief School Officer Dr. Jane Muna Phone (801) 593-8200
6. The Charter school is located in which school district? Davis School District
7. Attach all founders of the charter school (Attachment 1)
8. Attach all duly elected or appointed governing board members of the school (Attachment 2)
9. Requested amendment to charter (check all that apply).

- ☐ Waiver from Board Rule(s) R277-\_\_\_\_\_

(rule number and title)

Describe why this waiver is necessary to meet the mission of the school (Attachment 3)

- ☒ Change to charter agreement section(s): Throughout Charter Application – Name Change Only

(section number and title)

Describe the specific changes to the charter agreement – include redline version showing new additions and ~~removed language~~ (Attachment 3)

- ☐ Expansion/Reduction of grades served or number of students \_\_\_\_\_

(new grades and students served)

Will this expansion require a new facility or a structural addition to an existing facility? If so, provide a detailed facility plan (Attachment 3).

\_\_\_\_\_ Yes \_\_\_\_\_ No

10. a) Summary description of charter school:

Oquirrh Mountain Charter School (OMCS) serves grades K-9 in Kaysville, UT. OMCS emphasizes a challenging academic curriculum based on the Core Knowledge Sequence with a focus on American heritage, its founding principles and citizenship.

Oquirrh Mountain Charter School provides an environment in which every student has the opportunity to gain a strong foundation of knowledge in world and American history, classic literature, science, math, and fine arts.

OMCS works to have every student be challenged, experience success and master basic skills, grow in academic ability and content knowledge, and develop an understanding and appreciation for our nation's heritage and founding principles.

b) How many students does the charter school serve and what grades?

Oquirrh Mountain Charter School is currently authorized to serve 780 students in grades K-9. This amendment request is not for additional students.

c) Does the charter school's grade configuration align with the local school district configuration?

Oquirrh Mountain Charter School's K-9 grade configuration matches the grade configuration used by Davis School District.

d) Percentage of ethnic minority students at charter school and resident district:

|                                  |       |
|----------------------------------|-------|
| Oquirrh Mountain Charter School: | 11.5% |
| Davis School District:           | 15.2% |

e) Percentage of economically disadvantaged students at charter school and resident district:

|                                  |       |
|----------------------------------|-------|
| Oquirrh Mountain Charter School: | 19.3% |
| Davis School District:           | 25.5% |

f) Percentage of special education students at charter school and resident district:

|                                  |       |
|----------------------------------|-------|
| Oquirrh Mountain Charter School: | 11.8% |
| Davis School District:           | 10.0% |

g) Additional information:

11. What makes this school unique or needed?

Oquirrh Mountain Charter School is unique in their offering of a strong academic curriculum housed within a history-focused framework. The school also has adopted the Core Knowledge Sequence to help develop the intellect and provide a strong foundation in basic skills. The instruction is explicit, sequential, and teacher-directed with a multi-sensory approach.

12. Is the schools' curriculum fully aligned with the Utah Common Core? If not, in what areas does the school deviate from the Core?

Oquirrh Mountain Charter School follows the Utah State Core Curriculum and will be following the USOE suggested timeline, in coordination with Davis School District, for the implementation of the Common Core.

13. How does the school address the needs of students with disabilities who need Special Education services?

Oquirrh Mountain has in effect a Special Education Policies and Procedures Manual, approved by the USOE December of 2009, that ensures students with disabilities or suspected disabilities will be identified, evaluated, and provided appropriate educational services and/or accommodations within the definitions of IDEA 2004, ADA, and Section 504. Within the timeline requirements of the IDEA, this manual outlines Oquirrh Mountain's special education program and covers the following areas:

- General Provisions (Program Description);
- Identification, Location, and Evaluation of Students (Child Find, Referral, Evaluation, Re-Evaluation, Eligibility Determination including SLD Classification, and Eligibility Classifications);
- IEP Development and Service Delivery (IEP Team Participants, IEP Development and Content, LRE, Initial Placement, IEP Changes, Transition Services, and LRBI);
- Procedural safeguards for students and their parents (Parental Participation, Independent Education Evaluation (IEE), Written Prior Notices, Dispute Resolution, Surrogate Parents, Confidentiality, and Discipline);
- LEA Eligibility and Responsibilities (Assessment and Reporting, Public Posting, Ensuring Services, Supervision, Personnel Standards, Early Intervening Services, and Caseloads); and
- Students with Disabilities in Other Settings (Private and Public School Placements).

It is the policy of Oquirrh Mountain Charter School to adhere to and comply with federal and state laws and rules as they pertain to students with disabilities and the provision of a free appropriate public education, regardless of the nature or severity of the disability.

Oquirrh Mountain's Special Education Policy and Procedures Manual ensures the appropriate implementation of special education services. It is used in coordination with the Utah State Board of Education Rules (August 2007) and incorporates the USOE's Special Education Guidelines (August 2008) for Specific Learning Disabilities (SLD), Least Restrictive Behavioral Interventions (LRBI) and Caseloads as set forth and is on file in the school's policy binder and at the USOE.

The Oquirrh Mountain Special Education Policy and Procedures Manual is available to parents online at the following link:

[http://www.omcharterschool.org/Policies\\_Procedures.html](http://www.omcharterschool.org/Policies_Procedures.html)

14. Provide a copy of current approved school year budget and next year's projected budget using same format as required AFR budget (Attachment 4).
15. Provide a copy of most recent AYP and UPASS state academic information (Attachment 5). You may attach additional academic information if desired.

16. Who performs the financial accounting for the school (by name) and what are his/her credentials for accounting? (Attach resume – Attachment 6)

Brad Taylor performs the financial accounting and is an employee of Academica West, the business management company contracted by Oquirrh Mountain Charter School.

17. Provide the name and title of district personnel to whom you provided a copy of your entire amendment request, as well as the date of contact.

The Charter School Liaison for Davis School District, Sheri Suave, was provided a copy of the amendment request on August 17, 2012.

  
\_\_\_\_\_  
Charter School Board Representative Signature

\_\_\_\_\_  
August 17, 2012

\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Charter School Principal/Director

\_\_\_\_\_  
August 17, 2012

\_\_\_\_\_  
Date

**ATTACHMENT 1**  
**FOUNDING MEMBERS**

Joshua Bell  
Bruce and Allison Campbell  
Eric and Sharon Cazier  
Bill Comeau  
Neal Harris  
Mariam Herrman  
Monica McKinlay  
Chris Miller  
Susan Olsen  
Marc and Colette Petty  
Kaylynn Simms  
Tim Vogl  
Shelley Young

**ATTACHMENT 2**  
**BOARD OF DIRECTORS**

Keith Facer, Chair  
[kfacer@jeffersonacademy.org](mailto:kfacer@jeffersonacademy.org)

Neal Harris, Vice Chair  
[nharris@jeffersonacademy.org](mailto:nharris@jeffersonacademy.org)

Shelley Young, Secretary  
[syoung@jeffersonacademy.org](mailto:syoung@jeffersonacademy.org)

Joshua Spilker, Financial Coordinator  
[jpsilker@jeffersonacademy.org](mailto:jpsilker@jeffersonacademy.org)

Kristi Carlston, Parent Representative  
[kcarlston@jeffersonacademy.org](mailto:kcarlston@jeffersonacademy.org)

Kristine Beelek, Member  
[kbeelek@jeffersonacademy.org](mailto:kbeelek@jeffersonacademy.org)

### **ATTACHMENT 3**

## **CHANGES TO CHARTER APPLICATION**

Oquirrh Mountain Charter School is requesting to change the name of the school to Jefferson Academy to better reflect its charter emphasis on history, particularly American History, which is the foundation of instruction. It is not common knowledge that the Oquirrh Mountain range begins at Antelope Island, so the current name of the school has been confusing to patrons and the community. We believe that changing the name to Jefferson Academy will unite the school with the surrounding community in understanding our focus and location.

## ATTACHMENT 4

### 2012-2013 BUDGET & 2013-2014 PROJECTED BUDGET

| Charter School Name: Jefferson Academy            |   | Fiscal Year: 2012-2013 |                       |                    |
|---|---|------------------------|-----------------------|--------------------|
| <b>Operational Year</b>                           |   | <b>100% Enrollment</b> |                       |                    |
| Number of Students:                               |   | 780                    |                       |                    |
| Grade Configuration:                              |   | K-9                    |                       |                    |
| <b>Revenue</b>                                    |   |                        |                       |                    |
| Child Nutrition Program (CNP) and Lunchroom Sales |   | \$66,572               |                       |                    |
| Student Activities                                |   | \$0                    |                       |                    |
| Other   |   | \$30,600               |                       |                    |
| <b>Total Revenue From Local Sources (1000)</b>    |   | <b>\$97,172</b>        |                       |                    |
| <b>Total Revenue from State Sources (3000)</b>    |   | <b>\$4,254,684</b>     |                       |                    |
| Lunch and Breakfast Reimbursement                 |   | \$76,896               |                       |                    |
| Donated Commodities (CNP)                         |   | \$0                    |                       |                    |
| Restricted Federal Through State                  |   | \$0                    |                       |                    |
| Programs for the Disabled (IDEA)                  |   | \$212,337              |                       |                    |
| No Child Left Behind (NCLB)                       |   | \$52,092               |                       |                    |
| <b>Total Revenue from Federal Sources (4000)</b>  |   | <b>\$341,325</b>       |                       |                    |
| Private Grants & Donations:                       |   | \$0                    |                       |                    |
| Source(s) <i>(specify)</i>                        |   | \$0                    |                       |                    |
| Loans:  |   | \$0                    |                       |                    |
| Commercial  |   | \$0                    |                       |                    |
| Contributions and Donations from Private Sources  |   | \$0                    |                       |                    |
| Other <i>(specify)</i>                            |   | \$0                    |                       |                    |
| <b>Total Revenue from Other Sources (5000)</b>    |   | <b>\$0</b>             |                       |                    |
| <b>Total Revenue</b>                              |   | <b>\$4,693,181</b>     |                       |                    |
| <b>Expenditures</b>                               |   | <b>Number</b>          | <b>Salary or Cost</b> | <b>Total</b>       |
| 131   | Salaries - Teachers                             |                        |                       | \$1,325,743        |
| 132   | Salaries - Substitute Teachers                  |                        |                       | \$27,143           |
| 161   | Salaries - Teacher Aides and Paraprofessionals  |                        |                       | \$185,445          |
| 100   | Salaries - All Other                            |                        |                       | \$7,550            |
|   | Total Salaries (100)                            |                        |                       | <b>\$1,545,881</b> |
| 210   | Retirement                                      |                        |                       | \$0                |
| 220   | Social Security                                 |                        |                       | \$166,004          |
| 240   | Insurance (Health/Dental/Life)                  |                        |                       | \$0                |
| 200   | Other Benefits <i>(specify)</i>                 |                        |                       | \$302,400          |
|   | Total Benefits (200)                            |                        |                       | <b>\$468,404</b>   |
| 300   | Purchased Professional and Technical Services   |                        |                       | <b>\$114,047</b>   |
| 600   | Instructional Supplies                          |                        |                       | \$75,739           |
| 641   | Textbooks                                       |                        |                       | \$44,800           |
|   | Total Supplies (600)                            |                        |                       | <b>\$120,539</b>   |
| 700   | Total Property (Instructional Equipment) (700)  |                        |                       | <b>\$47,100</b>    |
| 800   | Other Objects                                   |                        |                       | \$3,500            |
| 810   | Dues and Fees                                   |                        |                       | \$0                |
|   | Total Other Objects (800)                       |                        |                       | <b>\$3,500</b>     |
| <b>Total Instruction (1000)</b>                   |   | <b>\$2,299,471</b>     |                       |                    |
| 141   | Salaries - Attendance and Social Work Personnel |                        |                       | \$0                |
| 142   | Salaries - Guidance Personnel                   |                        |                       | \$20,400           |
| 143   | Salaries - Health Services Personnel            |                        |                       | \$0                |
| 144   | Salaries - Psychological Personnel              |                        |                       | \$0                |
| 152   | Salaries - Secretarial and Clerical             |                        |                       | \$0                |
| 100   | Salaries - All Other                            |                        |                       | \$0                |



|  |   |  |  |                  |
|--|---|--|--|------------------|
|  | Total Salaries (100)                          |  |  | \$20,400         |
| 210  | Retirement                                    |  |  | \$0              |
| 220  | Social Security                               |  |  | \$2,122          |
| 240  | Insurance (Health/Dental/Life)                |  |  | \$0              |
| 200  | Other Benefits                                |  |  | \$0              |
|  | Total Benefits (200)                          |  |  | \$2,122          |
| 300  | Purchased Professional and Technical Services |  |  | \$10,000         |
| 600  | Supplies                                      |  |  | \$0              |
| 700  | Property                                      |  |  | \$0              |
| 800  | Other Objects                                 |  |  | \$0              |
| 810  | Dues and Fees                                 |  |  | \$0              |
|  | Total Other Objects (800)                     |  |  | \$0              |
| <b>Total Student Support Services (2100)</b>             |   |  |  | <b>\$32,522</b>  |
| 145  | Salaries - Media Personnel - Certified        |  |  | \$0              |
| 162  | Salaries - Media Personnel - Noncertified     |  |  | \$17,660         |
| 100  | Salaries - All Other                          |  |  | \$0              |
|  | Total Salaries (100)                          |  |  | \$17,660         |
| 210  | Retirement                                    |  |  | \$0              |
| 220  | Social Security                               |  |  | \$1,837          |
| 240  | Insurance (Health/Dental/Life)                |  |  | \$0              |
| 200  | Other Benefits                                |  |  | \$0              |
|  | Total Benefits (200)                          |  |  | \$1,837          |
| 300  | Purchased Professional and Technical Services |  |  | \$0              |
| 600  | Supplies                                      |  |  | \$0              |
| 644  | Library Books                                 |  |  | \$0              |
| 650  | Periodicals                                   |  |  | \$0              |
| 660  | Audio Visual Materials                        |  |  | \$0              |
|  | Total Supplies (600)                          |  |  | \$0              |
| 700  | Property                                      |  |  | \$0              |
| 800  | Other Objects                                 |  |  | \$0              |
| 810  | Dues and Fees                                 |  |  | \$0              |
|  | Total Other Objects (800)                     |  |  | \$0              |
| <b>Total Instructional Staff Support Services (2200)</b> |   |  |  | <b>\$19,497</b>  |
| 121  | Salaries - Principals and Assistants          |  |  | \$197,549        |
| 152  | Salaries - Secretarial and Clerical           |  |  | \$46,502         |
| 100  | Salaries - All Other                          |  |  | \$0              |
|  | Total Salaries (100)                          |  |  | \$244,051        |
| 210  | Retirement                                    |  |  | \$0              |
| 220  | Social Security                               |  |  | \$21,713         |
| 240  | Insurance (Health/Dental/Life)                |  |  | \$0              |
| 200  | Other Benefits                                |  |  | \$38,700         |
|  | Total Benefits (200)                          |  |  | \$60,413         |
| 300  | Purchased Professional and Technical Services |  |  | \$300,500        |
| 600  | Supplies                                      |  |  | \$2,000          |
| 700  | Property                                      |  |  | \$0              |
| 800  | Other Objects                                 |  |  | \$0              |
| 810  | Dues and Fees                                 |  |  | \$0              |
|  | Total Other Objects (800)                     |  |  | \$0              |
| <b>Total School Administration (2400)</b>                |   |  |  | <b>\$606,964</b> |
| 100  | Salaries                                      |  |  | \$0              |

|   |   |  |  |                  |
|---|---|--|--|------------------|
| 210   | Retirement                                    |  |  | \$0              |
| 220   | Social Security                               |  |  | \$0              |
| 240   | Insurance (Health/Dental/Life)                |  |  | \$0              |
| 200   | Other Benefits                                |  |  | \$0              |
|   | Total Benefits (200)                          |  |  | \$0              |
| 300   | Purchased Professional and Technical Services |  |  | \$18,500         |
| 400   | Purchased Property Services                   |  |  | \$128,060        |
| 460   | Construction and Remodeling                   |  |  | \$12,000         |
|   | Total Property (400)                          |  |  | \$140,060        |
| 500   | Other Purchased Services                      |  |  | \$17,500         |
| 600   | Supplies                                      |  |  | \$18,000         |
| 700   | Property                                      |  |  | \$11,000         |
| 800   | Other Objects                                 |  |  | \$14,500         |
| 810   | Dues and Fees                                 |  |  | \$2,500          |
|   | Total Other Objects (800)                     |  |  | \$17,000         |
| <b>Total Operation &amp; Maintenance of Facilities (2600)</b> |   |  |  | <b>\$204,560</b> |
| 100   | Salaries                                      |  |  | \$33,760         |
| 210   | Retirement                                    |  |  | \$0              |
| 220   | Social Security                               |  |  | \$3,511          |
| 240   | Insurance (Health/Dental/Life)                |  |  | \$0              |
| 200   | Other Benefits                                |  |  | \$7,200          |
|   | Total Benefits (200)                          |  |  | \$10,711         |
| 300   | Purchased Professional and Technical Services |  |  | \$0              |
| 600   | Non-Food Supplies                             |  |  | \$2,250          |
| 630   | Food  |  |  | \$66,216         |
|   | Total Supplies (600)                          |  |  | \$68,466         |
| 700   | Property                                      |  |  | \$29,090         |
| 780   | Depreciation - Kitchen Equipment Depreciation |  |  | \$0              |
|   | Total Property (700)                          |  |  | \$29,090         |
| 800   | Other Objects ( <i>Specify</i> )              |  |  | \$0              |
| <b>Total Food Services (3100)</b>                             |   |  |  | <b>\$142,027</b> |
| 100   | Salaries                                      |  |  | \$0              |
| 210   | Retirement                                    |  |  | \$0              |
| 220   | Social Security                               |  |  | \$0              |
| 240   | Insurance (Health/Dental/Life)                |  |  | \$0              |
| 200   | Other Benefits                                |  |  | \$0              |
|   | Total Benefits (200)                          |  |  | \$0              |
| 300   | Purchased Professional and Technical Services |  |  | \$0              |
| 400   | Purchased Property Services                   |  |  | \$0              |
| 460   | Construction and Remodeling                   |  |  | \$0              |
|   | Total Property (400)                          |  |  | \$0              |
| 500   | Other Purchased Services                      |  |  | \$0              |
| 600   | Supplies - New Buildings                      |  |  | \$0              |
| 641   | Textbooks - New Buildings                     |  |  | \$0              |
| 644   | Library Books - New Libraries                 |  |  | \$0              |
|   | Total Supplies (600)                          |  |  | \$0              |
| 710   | Land and Improvements                         |  |  | \$0              |
| 720   | Buildings                                     |  |  | \$0              |
| 731   | Machinery                                     |  |  | \$0              |
| 732   | School Buses                                  |  |  | \$0              |

|   |                                  |  |  |                    |
|---|----------------------------------|--|--|--------------------|
| 733   | Furniture and Fixtures           |  |  | \$0                |
| 734   | Technology Equipment             |  |  | \$0                |
| 735   | Non-Bus Vehicles                 |  |  | \$0                |
| 739   | Other Equipment                  |  |  | \$0                |
|   | Total Property (700)             |  |  | \$0                |
| 800   | Other Objects ( <i>Specify</i> ) |  |  | \$0                |
| <b>Total Building Acquisition &amp; Instruction (4500)</b>  |                                  |  |  | <b>\$0</b>         |
| 830   | Interest                         |  |  | \$1,020,530        |
| 840   | Redemption of Principal          |  |  | \$134,129          |
| <b>Total other financing sources (uses) and other items</b> |                                  |  |  | <b>\$1,154,659</b> |

|   |   |  |  |                    |
|---|---|--|--|--------------------|
| 1000  | Total Local                                   |  |  | \$97,172           |
| 3000  | Total State                                   |  |  | \$4,254,684        |
| 4000  | Total Federal                                 |  |  | \$341,325          |
| <b>TOTAL REVENUES</b>                                       |   |  |  | <b>\$4,693,181</b> |
| 100   | Salaries                                      |  |  | \$1,861,752        |
| 200   | Employee Benefits                             |  |  | \$543,486          |
| 300   | Purchased Professional and Technical Services |  |  | \$443,047          |
| 400   | Purchased Property Services                   |  |  | \$140,060          |
| 500   | Other Purchased Services                      |  |  | \$17,500           |
| 600   | Supplies                                      |  |  | \$209,005          |
| 700   | Property                                      |  |  | \$87,190           |
| 800   | Other Objects                                 |  |  | \$1,175,159        |
| <b>TOTAL EXPENDITURES</b>                                   |   |  |  | <b>\$4,477,199</b> |
| <b>Excess or Deficiency of Revenues over Expenditures</b>   |   |  |  | <b>\$215,982</b>   |
| <b>Other Sources of Funding (5000)</b>                      |   |  |  | <b>\$0</b>         |
| <b>Net Asset Balance (Fund Balance)</b>                     |   |  |  | <b>\$215,982</b>   |
| <b>Reserves as Percentage of Total Revenue</b>              |   |  |  | <b>5%</b>          |
| <b>Percentage of Funding Contributed to Reserve Balance</b> |   |  |  | <b>5%</b>          |
| <b>Necessary Closure Fund</b>                               |   |  |  | <b>\$219,203</b>   |

State Charter School Board  
Amendment Request

| Charter School Name: Jefferson Academy            |   |                    |                       | Fiscal Year: 2013-2014 |               |                       |                    |
|---|---|--------------------|-----------------------|------------------------|---------------|-----------------------|--------------------|
| Operational Year                                  |   | 100% Enrollment    |                       | 90% Enrollment         |               |                       |                    |
| Number of Students:                               |   | 780                |                       | 702                    |               |                       |                    |
| Grade Configuration:                              |   |                    |                       |                        |               |                       |                    |
| <b>Revenue</b>                                    |   |                    |                       |                        |               |                       |                    |
| Child Nutrition Program (CNP) and Lunchroom Sales |   | 68,236             |                       | \$0                    |               |                       |                    |
| Student Activities                                |   | 0                  |                       | \$0                    |               |                       |                    |
| Other   |   | 31,365             |                       | \$28,229               |               |                       |                    |
| <b>Total Revenue From Local Sources (1000)</b>    |   | <b>\$99,601</b>    |                       | <b>\$28,229</b>        |               |                       |                    |
| <b>Total Revenue from State Sources (3000)</b>    |   | <b>\$4,361,051</b> |                       | <b>\$3,977,279</b>     |               |                       |                    |
| Lunch and Breakfast Reimbursement                 |   | \$78,818           |                       | \$0                    |               |                       |                    |
| Donated Commodities (CNP)                         |   | \$0                |                       | \$0                    |               |                       |                    |
| Restricted Federal Through State                  |   | \$0                |                       | \$0                    |               |                       |                    |
| Programs for the Disabled (IDEA)                  |   | \$217,645          |                       | \$195,881              |               |                       |                    |
| No Child Left Behind (NCLB)                       |   | \$53,394           |                       | \$48,055               |               |                       |                    |
| <b>Total Revenue from Federal Sources (4000)</b>  |   | <b>\$349,858</b>   |                       | <b>\$243,936</b>       |               |                       |                    |
| Private Grants & Donations:                       |   | \$0                |                       | \$0                    |               |                       |                    |
| Source(s) (specify)                               |   | \$0                |                       | \$0                    |               |                       |                    |
| Loans:  |   | \$0                |                       | \$0                    |               |                       |                    |
| Commercial  |   | \$0                |                       | \$0                    |               |                       |                    |
| Contributions and Donations from Private Sources  |   | \$0                |                       | \$0                    |               |                       |                    |
| Other (specify)                                   |   | \$0                |                       | \$0                    |               |                       |                    |
| <b>Total Revenue from Other Sources (5000)</b>    |   | <b>\$0</b>         |                       | <b>\$0</b>             |               |                       |                    |
| <b>Total Revenue</b>                              |   | <b>\$4,810,511</b> |                       | <b>\$4,249,443</b>     |               |                       |                    |
| <b>Expenditures</b>                               |   | <b>Number</b>      | <b>Salary or Cost</b> | <b>Total</b>           | <b>Number</b> | <b>Salary or Cost</b> | <b>Total</b>       |
| 131   | Salaries - Teachers                             |                    |                       | \$1,358,887            |               |                       | \$1,222,998        |
| 132   | Salaries - Substitute Teachers                  |                    |                       | \$27,822               |               |                       | \$25,039           |
| 161   | Salaries - Teacher Aides and Paraprofessionals  |                    |                       | \$190,081              |               |                       | \$171,073          |
| 100   | Salaries - All Other                            |                    |                       | \$7,739                |               |                       | \$6,965            |
|   | <b>Total Salaries (100)</b>                     |                    |                       | <b>\$1,695,831</b>     |               |                       | <b>\$1,426,075</b> |
| 210   | Retirement                                      |                    |                       | \$0                    |               |                       | \$0                |
| 220   | Social Security                                 |                    |                       | \$170,154              |               |                       | \$153,139          |
| 240   | Insurance (Health/Dental/Life)                  |                    |                       | \$0                    |               |                       | \$0                |
| 200   | Other Benefits (specify)                        |                    |                       | \$309,960              |               |                       | \$278,964          |
|   | <b>Total Benefits (200)</b>                     |                    |                       | <b>\$480,114</b>       |               |                       | <b>\$432,103</b>   |
| 300   | Purchased Professional and Technical Services   |                    |                       | \$116,898              |               |                       | \$105,208          |
| 600   | Instructional Supplies                          |                    |                       | \$77,632               |               |                       | \$69,869           |
| 641   | Textbooks                                       |                    |                       | \$45,920               |               |                       | \$41,328           |
|   | <b>Total Supplies (600)</b>                     |                    |                       | <b>\$123,552</b>       |               |                       | <b>\$111,197</b>   |
| 700   | Total Property (Instructional Equipment) (700)  |                    |                       | \$48,278               |               |                       | \$43,450           |
| 800   | Other Objects                                   |                    |                       | \$3,588                |               |                       | \$3,229            |
| 810   | Dues and Fees                                   |                    |                       | \$0                    |               |                       | \$0                |
|   | <b>Total Other Objects (800)</b>                |                    |                       | <b>\$3,588</b>         |               |                       | <b>\$3,229</b>     |
| <b>Total Instruction (1000)</b>                   |   | <b>\$2,468,261</b> |                       | <b>\$2,121,262</b>     |               |                       |                    |
| 141   | Salaries - Attendance and Social Work Personnel |                    |                       | \$0                    |               |                       | \$0                |
| 142   | Salaries - Guidance Personnel                   |                    |                       | \$20,910               |               |                       | \$20,910           |
| 143   | Salaries - Health Services Personnel            |                    |                       | \$0                    |               |                       | \$0                |
| 144   | Salaries - Psychological Personnel              |                    |                       | \$0                    |               |                       | \$0                |
| 152   | Salaries - Secretarial and Clerical             |                    |                       | \$0                    |               |                       | \$0                |
| 100   | Salaries - All Other                            |                    |                       | \$0                    |               |                       | \$0                |
|   | <b>Total Salaries (100)</b>                     |                    |                       | <b>\$20,910</b>        |               |                       | <b>\$20,910</b>    |
| 210   | Retirement                                      |                    |                       | \$0                    |               |                       | \$0                |
| 220   | Social Security                                 |                    |                       | \$2,175                |               |                       | \$2,175            |
| 240   | Insurance (Health/Dental/Life)                  |                    |                       | \$0                    |               |                       | \$0                |
| 200   | Other Benefits                                  |                    |                       | \$0                    |               |                       | \$0                |
|   | <b>Total Benefits (200)</b>                     |                    |                       | <b>\$2,175</b>         |               |                       | <b>\$2,175</b>     |
| 300   | Purchased Professional and Technical Services   |                    |                       | \$10,250               |               |                       | \$9,348            |
| 600   | Supplies  |                    |                       | \$0                    |               |                       | \$0                |
| 700   | Property  |                    |                       | \$0                    |               |                       | \$0                |
| 800   | Other Objects                                   |                    |                       | \$0                    |               |                       | \$0                |
| 810   | Dues and Fees                                   |                    |                       | \$0                    |               |                       | \$0                |
|   | <b>Total Other Objects (800)</b>                |                    |                       | <b>\$0</b>             |               |                       | <b>\$0</b>         |
| <b>Total Student Support Services (2100)</b>      |   | <b>\$33,335</b>    |                       | <b>\$32,433</b>        |               |                       |                    |
| 145   | Salaries - Media Personnel - Certified          |                    |                       | \$0                    |               |                       | \$0                |
| 162   | Salaries - Media Personnel - Noncertified       |                    |                       | \$18,102               |               |                       | \$18,102           |
| 100   | Salaries - All Other                            |                    |                       | \$0                    |               |                       | \$0                |
|   | <b>Total Salaries (100)</b>                     |                    |                       | <b>\$18,102</b>        |               |                       | <b>\$18,102</b>    |
| 210   | Retirement                                      |                    |                       | \$0                    |               |                       | \$0                |
| 220   | Social Security                                 |                    |                       | \$1,883                |               |                       | \$1,883            |
| 240   | Insurance (Health/Dental/Life)                  |                    |                       | \$0                    |               |                       | \$0                |
| 200   | Other Benefits                                  |                    |                       | \$0                    |               |                       | \$0                |
|   | <b>Total Benefits (200)</b>                     |                    |                       | <b>\$1,883</b>         |               |                       | <b>\$1,883</b>     |
| 300   | Purchased Professional and Technical Services   |                    |                       | \$0                    |               |                       | \$0                |

State Charter School Board  
Amendment Request

|   |   |  |  |                  |  |                  |
|---|---|--|--|------------------|--|------------------|
| 600   | Supplies                                      |  |  | \$0              |  | \$0              |
| 644   | Library Books                                 |  |  | \$0              |  | \$0              |
| 650   | Periodicals                                   |  |  | \$0              |  | \$0              |
| 660   | Audio Visual Materials                        |  |  | \$0              |  | \$0              |
|   | Total Supplies (600)                          |  |  | \$0              |  | \$0              |
| 700   | Property                                      |  |  | \$0              |  | \$0              |
| 800   | Other Objects                                 |  |  | \$0              |  | \$0              |
| 810   | Dues and Fees                                 |  |  | \$0              |  | \$0              |
|   | Total Other Objects (800)                     |  |  | \$0              |  | \$0              |
| <b>Total Instructional Staff Support Services (2200)</b>      |   |  |  | <b>\$19,984</b>  |  | <b>\$19,984</b>  |
| 121   | Salaries - Principals and Assistants          |  |  | \$82,000         |  | \$82,000         |
| 152   | Salaries - Secretarial and Clerical           |  |  | \$47,665         |  | \$47,665         |
| 100   | Salaries - All Other                          |  |  | \$0              |  | \$0              |
|   | Total Salaries (100)                          |  |  | \$129,665        |  | \$129,665        |
| 210   | Retirement                                    |  |  | \$0              |  | \$0              |
| 220   | Social Security                               |  |  | \$13,485         |  | \$13,485         |
| 240   | Insurance (Health/Dental/Life)                |  |  | \$0              |  | \$0              |
| 200   | Other Benefits                                |  |  | \$38,700         |  | \$38,700         |
|   | Total Benefits (200)                          |  |  | \$52,185         |  | \$52,185         |
| 300   | Purchased Professional and Technical Services |  |  | \$335,500        |  | \$308,200        |
| 600   | Supplies                                      |  |  | \$2,050          |  | \$1,870          |
| 700   | Property                                      |  |  | \$0              |  | \$0              |
| 800   | Other Objects                                 |  |  | \$0              |  | \$0              |
| 810   | Dues and Fees                                 |  |  | \$0              |  | \$0              |
|   | Total Other Objects (800)                     |  |  | \$0              |  | \$0              |
| <b>Total School Administration (2400)</b>                     |   |  |  | <b>\$519,400</b> |  | <b>\$491,919</b> |
| 100   | Salaries                                      |  |  | \$0              |  | \$0              |
| 210   | Retirement                                    |  |  | \$0              |  | \$0              |
| 220   | Social Security                               |  |  | \$0              |  | \$0              |
| 240   | Insurance (Health/Dental/Life)                |  |  | \$0              |  | \$0              |
| 200   | Other Benefits                                |  |  | \$0              |  | \$0              |
|   | Total Benefits (200)                          |  |  | \$0              |  | \$0              |
| 300   | Purchased Professional and Technical Services |  |  | \$18,963         |  | \$17,066         |
| 400   | Purchased Property Services                   |  |  | \$131,262        |  | \$118,135        |
| 460   | Construction and Remodeling                   |  |  | \$12,300         |  | \$11,070         |
|   | Total Property (400)                          |  |  | \$143,562        |  | \$129,205        |
| 500   | Other Purchased Services                      |  |  | \$0              |  | \$0              |
| 600   | Supplies                                      |  |  | \$18,450         |  | \$16,605         |
| 700   | Property                                      |  |  | \$11,275         |  | \$10,148         |
| 800   | Other Objects                                 |  |  | \$14,863         |  | \$13,376         |
| 810   | Dues and Fees                                 |  |  | \$2,563          |  | \$2,306          |
|   | Total Other Objects (800)                     |  |  | \$17,425         |  | \$15,683         |
| <b>Total Operation &amp; Maintenance of Facilities (2600)</b> |   |  |  | <b>\$209,674</b> |  | <b>\$188,707</b> |
| 100   | Salaries                                      |  |  | \$34,604         |  | \$31,144         |
| 210   | Retirement                                    |  |  | \$0              |  | \$0              |
| 220   | Social Security                               |  |  | \$3,599          |  | \$3,239          |
| 240   | Insurance (Health/Dental/Life)                |  |  | \$0              |  | \$0              |
| 200   | Other Benefits                                |  |  | \$7,380          |  | \$6,642          |
|   | Total Benefits (200)                          |  |  | \$10,979         |  | \$9,881          |
| 300   | Purchased Professional and Technical Services |  |  | \$0              |  | \$0              |
| 600   | Non-Food Supplies                             |  |  | \$2,306          |  | \$2,076          |
| 630   | Food  |  |  | \$67,871         |  | \$61,084         |
|   | Total Supplies (600)                          |  |  | \$70,178         |  | \$63,160         |
| 700   | Property                                      |  |  | \$29,817         |  | \$26,836         |
| 780   | Depreciation - Kitchen Equipment Depreciation |  |  | \$0              |  | \$0              |
|   | Total Property (700)                          |  |  | \$29,817         |  | \$26,836         |
| 800   | Other Objects ( <i>Specify</i> )              |  |  | \$0              |  | \$0              |
| <b>Total Food Services (3100)</b>                             |   |  |  | <b>\$145,578</b> |  | <b>\$131,020</b> |
| 100   | Salaries                                      |  |  | \$0              |  | \$0              |
| 210   | Retirement                                    |  |  | \$0              |  | \$0              |
| 220   | Social Security                               |  |  | \$0              |  | \$0              |
| 240   | Insurance (Health/Dental/Life)                |  |  | \$0              |  | \$0              |
| 200   | Other Benefits                                |  |  | \$0              |  | \$0              |
|   | Total Benefits (200)                          |  |  | \$0              |  | \$0              |
| 300   | Purchased Professional and Technical Services |  |  | \$0              |  | \$0              |
| 400   | Purchased Property Services                   |  |  | \$0              |  | \$0              |
| 460   | Construction and Remodeling                   |  |  | \$0              |  | \$0              |
|   | Total Property (400)                          |  |  | \$0              |  | \$0              |
| 500   | Other Purchased Services                      |  |  | \$0              |  | \$0              |
| 600   | Supplies - New Buildings                      |  |  | \$0              |  | \$0              |
| 641   | Textbooks - New Buildings                     |  |  | \$0              |  | \$0              |
| 644   | Library Books - New Libraries                 |  |  | \$0              |  | \$0              |
|   | Total Supplies (600)                          |  |  | \$0              |  | \$0              |

State Charter School Board  
Amendment Request

|  |   |  |  |             |  |             |
|--|---|--|--|-------------|--|-------------|
| 710  | Land and Improvements                         |  |  | \$0         |  | \$0         |
| 720  | Buildings                                     |  |  | \$0         |  | \$0         |
| 731  | Machinery                                     |  |  | \$0         |  | \$0         |
| 732  | School Buses                                  |  |  | \$0         |  | \$0         |
| 733  | Furniture and Fixtures                        |  |  | \$0         |  | \$0         |
| 734  | Technology Equipment                          |  |  | \$0         |  | \$0         |
| 735  | Non-Bus Vehicles                              |  |  | \$0         |  | \$0         |
| 739  | Other Equipment                               |  |  | \$0         |  | \$0         |
|  | Total Property (700)                          |  |  | \$0         |  | \$0         |
| 800  | Other Objects (Specify)                       |  |  | \$0         |  | \$0         |
| Total Building Acquisition & Instruction (4500)      |   |  |  | \$0         |  | \$0         |
| 830  | Interest                                      |  |  | \$1,020,530 |  | \$1,020,530 |
| 840  | Redemption of Principal                       |  |  | \$134,129   |  | \$134,129   |
| Total other financing sources (uses) and other items |   |  |  | \$1,154,659 |  | \$1,154,659 |
|  |   |  |  |             |  |             |
| 1000   | Total Local                                   |  |  | \$99,601    |  | \$28,229    |
| 3000   | Total State                                   |  |  | \$4,361,051 |  | \$3,977,279 |
| 4000   | Total Federal                                 |  |  | \$349,858   |  | \$243,936   |
| TOTAL REVENUES                                       |   |  |  | \$4,810,511 |  | \$4,249,443 |
| 100  | Salaries                                      |  |  | \$1,899,112 |  | \$1,625,895 |
| 200  | Employee Benefits                             |  |  | \$547,335   |  | \$498,226   |
| 300  | Purchased Professional and Technical Services |  |  | \$481,611   |  | \$439,823   |
| 400  | Purchased Property Services                   |  |  | \$143,562   |  | \$129,205   |
| 500  | Other Purchased Services                      |  |  | \$0         |  | \$0         |
| 600  | Supplies                                      |  |  | \$214,230   |  | \$192,832   |
| 700  | Property                                      |  |  | \$89,370    |  | \$80,433    |
| 800  | Other Objects                                 |  |  | \$1,175,672 |  | \$1,173,570 |
| TOTAL EXPENDITURES                                   |   |  |  | \$4,550,890 |  | \$4,139,983 |
| Excess or Deficiency of Revenues over Expenditures   |   |  |  | \$259,620   |  | \$109,459   |
| Other Sources of Funding (5000)                      |   |  |  | \$0         |  | \$0         |
| Net Asset Balance (Fund Balance)                     |   |  |  | \$259,620   |  | \$109,459   |
| Reserves as Percentage of Total Revenue              |   |  |  | 5%          |  | 3%          |
| Percentage of Funding Contributed to Reserve Balance |   |  |  | 5%          |  | 3%          |
| Necessary Closure Fund                               |   |  |  | \$219,872   |  | \$217,129   |

## ATTACHMENT 6 FINANCIAL ACCOUNTANTS

**Brad Taylor**  
**352 North Flint Street**  
**Kaysville, UT 84037**

**Telephone: (801) 444-9378**  
**Email: [brad@academicawest.com](mailto:brad@academicawest.com)**

|   |  |
|---|--|
| Education                               | Weber State University - Ogden, Utah<br>Masters of Accountancy Degree–May 2004<br>Bachelor of Arts Degree–May 2003<br>Major: Accounting Minor: Spanish<br>Cumulative GPA: 3.98 Major GPA: 3.98   |
| Educational Highlights                  | Goddard MPAcc Scholar – Top Three Post-Graduate Ranking<br>Goddard Scholar – Top Ten Business School Graduate<br>Member of Beta Gamma Sigma scholastic fraternity<br>Member of Deloitte & Touche University Case Seminar–2003  |
| Work Experience<br>2004 – April 2005    | Deloitte & Touche - Salt Lake City, UT<br><u>Audit Staff</u> – Field work and preparation of annual financial statements for companies both publicly and privately traded. Tested inventory, A/R, A/P, long-term liabilities, and cash as presented on balance sheets.   |
| Work Experience<br>April 2005 - Present | Academica West - Kaysville, Utah<br><u>Controller</u> - Responsible for oversight of all accounting activities. Oversee annual audits and preparation of financial statements for 11 charter schools currently in operation. Organize and comply with all state financial reporting requirements. Manage schools' cash flows and budgeting in coordination with corresponding principals and board members.  |
| Skills and Abilities                    | Strong interpersonal skills with a superior understanding of audit processes and non-profit businesses. Able to organize and oversee a staff that responds to accounting needs of charter schools, including, but not limited to, payroll, accounts payable, budgeting, cash flow management, state and IRS reports, and so forth. Experienced in QuickBooks and other accounting programs. Strong understanding of state reporting requirements. Fluent in Spanish. |