

December 10, 2014

Dear Utah State Charter School Board,

Classical Innovations is pleased to submit the final draft of the charter application for your approval. Following review of the readers' comments, we have made changes and included additional information throughout the document, as outlined below.

1. The mission specific goals in Section One have been rewritten.
2. Section Two (Market Analysis) has been updated throughout.
3. A more comprehensive framework for aligning curriculum to the Core Standards has been included on page 31.
4. Additional information on assessing effectiveness of professional development is included on pages 29-30.
5. One reader comment asked if social studies credits would be higher at Classical Innovations. The answer is yes, Classical Innovations does require more social studies credits to graduate than the Davis School District, as outlined in the graduation requirements.
6. Goals in Section Five have been re-written.
7. Explanation behind teachers being called teacher mentors is elaborated upon on page 72.
8. The governing board currently consists of five members bringing a diverse amount of expertise and experience to the board. Reader comments suggested someone with legal expertise. The board will continue looking for such expertise, but in the meantime believes the backgrounds of board members Todd Wente and Richard Eccles provide the board with some legal understanding of the educational world, and will retain good legal counsel as necessary.

We look forward to working with you to make Classical Innovations a reality.

Sincerely,

The Classical Innovations Board



Classical Innovations

A Utah Public Charter School Application

Producing citizen-leaders who can think critically and are able to speak and act persuasively to defend the twin pillars of justice and liberty

Stephen Brink
Founder
12/10/2014



Required Information

I. Charter School Information

1. Name of proposed charter school: Classical Innovations

2. Name of applicant: Stephen Brink

3. Authorized agent: Stephen Brink

4. Mailing address: Street, City, State, Zip: 36 West Park Drive Kaysville, Utah 84037

5. Phone number: (801)663-0864

6. Email address: Stephen.sabres@gmail.com

7. District(s) where proposed charter school is located: Davis

8. District contact(s) and date complete application submitted to district(s). (NOTE: repeat this statement for each district in which the school may be located.)

Submitted to Dr. Bowles (bbowles@dsdmail.net) who works at Davis School District _____
School District on __9/30/2014_____ (date).

9. Form of organization (check)

☒ Nonprofit Corporation ☐ Tribal entity ☐ Other

10. The governing body of a charter school is responsible for the policy decisions of the school. Please indicate the makeup of this body below. (Add lines as necessary)

	Name	Email	Type of Member (e.g., parent, business)	Position on Board (e.g., chair, secretary)	
	Stephen Brink	Stephen.sabres@gmail.com	Parent/Educator	Chair	
	Elissa Cruz	elissadc@yahoo.com	Parent	Vice-Chair	
	Stefanie Cragun	stefaniecragun@gmail.com	Parent/Educator	Secretary	
R	Richard Eccles	richardeccles@gmail.com	Business Administration	Treasurer	
	Todd Wente	Twente_shc@hotmail.com	Business/Education	Member	

11. Year school will start: August 2016

12. Grades served: 7-12

13. Number of instructional days: 180

14. Number of instructional hours: At least 990

<p>15. Requested Enrollment</p> <p>Operational year 1: Grade K: ____ Grades 1-6: ____ Grades 7-8: <u>_140_</u> Grades 9-12: <u>_280_</u> Total: <u>_420_</u></p> <p>Operational year 2: Grade K: ____ Grades 1-6: ____ Grades 7-8: ____ Grades 9-12: ____ Total: ____</p> <p>Operational year 3: Grade K: ____ Grades 1-6: ____ Grades 7-8: ____ Grades 9-12: ____ Total: ____</p> <p>Does proposed grade configuration match resident district grade configuration? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>16. Target percentage of educationally disadvantaged students: 25%</p>	
<p>17. Is this a application seeking special treatment under UCA 53A-1a-501.9? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>18. Is this application seeking priority consideration under UCA 53A-1a-502.5? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>
<p>19. A charter school may apply to the State Board of Education for a waiver of any rule that inhibits or hinders the school from accomplishing its mission or educational goals set out in its charter. List any waiver requests here (i.e., Rule numbers. Provide details regarding the need for the waiver as Attachment A).</p>	
<p>20. List persons whom you have designated as founding members of the school. Children/grandchildren of a Founding Member (an individual who has had a significant role in the development of a charter school application), children/grandchildren of an employee, and siblings of students currently attending the charter school are eligible for preferential enrollment under both State and Federal Charter School law. Also, identify the percentage of students eligible for preferential enrollment under the status of founder's child or employee child.</p>	

II. Assurances

The applicant charter school hereby assures and certifies to the Utah State Charter School Board and Utah State Board of Education that: Read and Check

- ✓ The charter school will make provision for such fiscal control, fund and program accounting procedures as may be necessary to assure proper disbursement and accounting for all funds, and will utilize fiscal procedures that are consistent with generally accepted standards of fiscal management.
- ✓ The charter school will not expend program funds for any education program, activity, or service related to sectarian instruction or religious worship.
- ✓ The charter school assures that resources will be available and a process established to develop a Student Education Plan/Student Education Occupation Plan (SEP/SEOP) for each student.
- ✓ The charter school will maintain an active parent/guardian involvement process including some formal mechanism for meaningful involvement in site-based decision making.
- ✓ The charter school will not charge tuition or fees, except those fees allowed by law. Governing Boards will adopt allowable fees annually in an open board meeting.
- ✓ A copy of the charter will be supplied to interested individuals or groups on request.
- ✓ The charter school will be fully accredited no later than its second year of operation.
- ✓ The charter school will acquire and maintain nonprofit corporate status.
- ✓ The charter school will acquire and maintain all required insurances, including General Liability Coverage for both Bodily Injury and Property Damage Liability at \$2 million per occurrence; perhaps, with an annual aggregate amount; Automobile Liability Coverage for Bodily Injury and Property Damage at \$2 million per occurrence including PIP coverage; Personal Injury / Civil Rights Coverage for claimed Constitutional violations and claimed violations of federal and state law at \$2 million per occurrence; Errors and Omission Coverage for, among other things, actions taken by directors and board members who govern the school at \$2 million per occurrence; Government

Crime Policy including employee theft, faithful performance, and coverage for employee and officer bonds; Property Coverages - probably a standard all-risk property policy with possible endorsements for Business Interruption, Extra Expense and Tuition Fee coverage; Workers' Compensation Coverage at such amounts and limits as required by Utah law; and Treasurer's Bond.

- ✓ The charter school will maintain accurate student transcripts.
- ✓ The charter school is nonsectarian in its programs, admission policies, and employment practices and all other operations.
- ✓ The charter school Principal/Director shall attend a one-day special education training class sponsored by the Utah State Office of Education prior to the first day of instruction and annually thereafter.
- ✓ The governing board will name and provide email contact information for the following individuals prior to opening and at any time the school makes changes to these positions: Board Chair, Executive Director, Principal, Assistant Principal, Assessment Director, Special Education Director, Title IX Civil Rights Monitor Officer, Section 504 Coordinator, and Business Official.
- ✓ The charter school applicant acknowledges that neither the chartering entity nor the state, including an agency of the state, is liable for the debts or financial obligations of the charter school or persons or entities who operate the charter school.
- ✓ The charter school applicant certifies all information contained in this application is complete and accurate, realizing that any misrepresentation could result in disqualification from the charter application process or revocation after award. The charter school applicant understands that incomplete applications will not be considered.
- ✓ The charter school applicant acknowledges that it has read all Utah statutes regarding charter schools and that, if approved, it is subject to and will ensure compliance with all relevant federal, state and local laws and requirements. The charter school applicant acknowledges that, if approved to operate a charter school, it must execute a charter contract with the Utah State Charter School Board within twelve months of the date of approval of the charter by the Utah State Board of Education and must begin providing educational services within the timeframe outlined in the charter. Failure to do so may result in revocation of the charter approval and, if applicable, termination of the contract and revocation of the charter.

The authorized agent of the applicant charter school certifies that, to the best of his/her knowledge and

belief, the data in this application are true and accurate, and that the applicant will comply with the assurances noted above if this application is approved. Therefore, this application for charter school status and funding is hereby submitted with the full approval and support of the governing body of the proposed charter school.

III. Signatures

WE, THE UNDERSIGNED, do hereby agree to the certifications contained in *Section II. Assurances* above.

Name of Authorized Agent: Stephen Brink

Signature of Authorized Agent

Name of Charter School Board Chair (if different than Authorized Agent)

Signature of Charter School Board Chair (if different than Authorized Agent)

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Contents

Required Information	1
Executive Summary.....	7
Section 1: School Purpose.....	8
Section 2: Market Analysis	12
Section 3: Student Population	16
Section 4: Program of Instruction	27
Section 6: Governance	45
Section 7: Staffing	72
Section 8: Business Plan	93
Section 9: Education Service Providers.....	108
Appendix A: Waiver Requests.....	114
Appendix B: Memorandums of Understanding or ESP Contracts	115
Appendix C: Budget Forms.....	117

Executive Summary

Classical Innovations is a school designed to prepare students to be citizen-leaders who can think critically and speak and act persuasively to defend the twin pillars of justice and liberty. Students who graduate from Classical Innovations will not only be well prepared for college, but they will be especially prepared for studies in law, politics, executive leadership in the public and private sectors, and other social science fields.

Stephen Brink, the founder of Classical Innovations, has had experience in world of business, education, and civic involvement. As a former charter school teacher he realized how few students in the secondary setting were developing the essential skill of critical thinking. He began thinking about how to best help his students learn to think critically, and found support for his ideas among parents and community members. Stephen is joined on the board by Stefanie Cragun, a veteran special education teacher and director who believes in the mission, vision, and educational philosophy of the school, Elissa Cruz, a parent, author, and public speaker who sees the value of the program Classical Innovations will offer to its students. Todd Wente, a seasoned businessman and post-secondary education administrator lends valuable insight and experience, as does Rich Eccles, an experienced charter school business administrator.

The school intends to locate in Davis County, where initial surveys and market analysis indicate it will do well. The school will be small enough to cater to the niche population of high academic achievers who have an interest in social studies and humanities, but large enough to be financially viable by housing students in grades seven through twelve.

Students who attend Classical Innovations will be instructed using the Socratic Method and will employ primary source documents as the main curricular material whenever possible. This combination will allow students to put meaning and relevance to what they are learning, and help them cultivate a deep understanding of the “why” and the “how” behind concepts and events, uniquely preparing them for leading society. The emphasis of debate and public speaking skills will enable them to communicate and work with the many players involved in public discourse in an efficient and articulate manner.

Section 1: School Purpose

Purpose

As required in Utah Code 53A-1a-503, Classical Innovations meets three criteria for charter approval eligibility:

(1) Continue to improve student learning: As students are taught using the Socratic Method, critical thinking skills are strengthened, increasing their ability to learn, master, and retain content;

(2) Encourage the use of different and innovative teaching methods: The use of the Socratic Method coupled with the focus on primary source documents as texts is not being used in Utah;

(4) Increase choice of learning opportunities for students: There is not a school in Davis County that offers students an educational program based on the Socratic Method of instruction.

Mission

Classical Innovations prepares students to be citizen-leaders through a rigorous, Classically-based education, delivered by passionate teacher-mentors using innovative methods to support student achievement and mentor efficiency.

Vision

Classical Innovations produces citizen-leaders who can think critically and speak and act persuasively to defend the twin pillars of justice and liberty. Citizen-leaders are able to articulate needs and solutions and work collaboratively with others to support strong and positive communities.

Students who are graduates of Classical Innovations will use these skills to go on to college and graduate level programs where they will further develop and refine their abilities, graduating at the top of their respective classes, and then work in their chosen fields for the betterment of society. The founders envision students working in the legal fields, public policy, public office, executive leadership in both the corporate and non-profit arenas, and other social science fields.

Educational Philosophy

Classical Innovations uses the Socratic Method as the base of all instruction at the school. All classes are facilitated by teachers trained to teach through questioning. As explained and cited in Section Three, the Socratic Method is very effective in helping students develop critical thinking skills and also aids in development of articulation of ideas and public speaking. The group discussions and projects help students cultivate collaboration skills.

Classical Innovations asserts that use of primary source documents used in conjunction with the Socratic Method will help students develop a greater understanding of history and provide necessary insight into how things came to be in our world today. This knowledge,

combined with critical thinking skills and further education will equip students to be successful citizen-leaders who build strong communities through defense of justice and liberty. Primary source documents will be used as frequently as possible in all classes at Classical Innovations.

School Culture

The culture of Classical Innovations is one of curiosity, caring, leadership and achievement. As students are taught using the Socratic Method, they will ask more questions and will be taught how to find those answers. The more they learn, the more questions they will have, increasing curiosity. Teachers will work as mentors to help students find the answers—metaphorically speaking they are being taught to fish rather than being handed a fish.

As students explore questions and topics within the context of history and the humanities, they will learn to see things from the viewpoints of others, developing empathy and perspective.

When interest in a particular social issue is combined with perspective and empathy, students will be encouraged and taught how to identify a specific need, build support, and create and carry out a plan to make an impact for good in the communities they live in.

As students understand the “why” of concepts as taught through the Socratic Method, content mastery is more likely to occur, increasing academic achievement. Individual achievements in academics, extra-curricular competitions, civic awards, and athletic accomplishments will be celebrated by the entire school.

Students understand they have a responsibility to build academic capacity, perspective, and leadership skills as they are the future leaders of society.

Accountability

The Classical Innovations Board of Trustees acknowledges the importance of planning, goal setting, and evaluation in the success of any organization. To that end, the Board of Trustees will work with the school administration to develop a strategic plan, encompassing both short and long-term objectives. The plan will be updated annually and the Board will review the goals along with progress and challenges in board meeting at least three times a year. During this meeting subcommittees may be formed to assist school leadership in solving problems or implementing plans.

Mission Specific Goals

Goal 1: 80% of Classical Innovations students will apply skills of articulating thoughts and ideas coherently through competing on the school debate team or public speaking contests or events annually.

Goal 2: Classical Innovations students demonstrate academic excellence through receipt of scholarships. 75% of students in the school's second operational year will receive scholarships, 80% in year three, 85% in year four, and 90% in year five and subsequent years.

Goal 3: 100% of Classical Innovations students will serve as leaders in their communities by annually planning, organizing, and completing a service project.

Goal 4: 100% of seniors demonstrate adequate critical thinking skills through completion of a senior thesis.

Goal 5: 95% of teachers will attend professional development training specific to the Socratic Method at the beginning of the year and pass a comprehensive exam, including teaching, to demonstrate competence in the method.

Target Population

The target population for Classical Innovations is students in grades seven through twelve in the Davis County area who desire a college preparatory education including: Smaller class sizes (approximately twenty-three students per classroom),

- A discussion-based approach to learning
- A focus on critical-thinking and persuasive speaking and writing
- An environment where mentors guide students using a combination of new and old methods and technology
- An environment where independent thinking and individual opinions can be expressed

Each grade will consist of seventy students, in grades six through twelve, for a total enrollment of 420 students. During the first operational years, Classical Innovations acknowledges that enrollment in the upper grades will likely not be full, and enrollment in the lower grades will be increased. Classical Innovations will maintain the smaller class sizes even when a grade is overenrolled by re-assigning teaching staff as needed. This approach will allow for organic growth over time, as not all students who enroll in a charter school, particularly a new school, remain enrolled for subsequent years. The budget, as detailed in Section Eight shows the school is still financially viable with seventy five percent enrollment.

The target population is primarily students who are curious and often academically accelerated, possess a deep interest in the social sciences, have a desire to figure out the “why” of things, enjoy a challenge, and are college bound. Many of these students will be interested in professions in the legal field, public policy, and executive leadership.

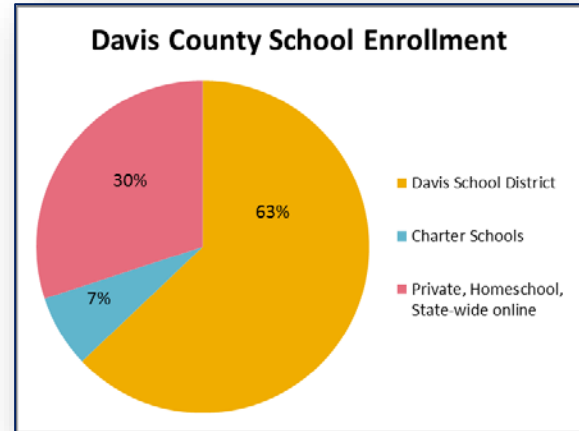
Classical Innovation's mission of preparing students for collegiate success and to become citizen leaders will resonate with those who are interested in the humanities and social sciences. Many students with high interest in the humanities and social sciences go on to get

degrees in fields such as law, political science, social services, and public administration. The development of skills such as public speaking, debate, ability to reason, and empathy is needed in order for students to be effective in these fields. The curriculum, teaching methods, and school sponsored extra-curricular activities build these needed skills, as detailed in Section Four of this document.

Section 2: Market Analysis

Educational Landscape

Classical Innovations intends to locate within the boundaries of the Davis School District, most likely in or south of Layton. Currently, Davis School District is the second largest district in the state, and growth models predict it will be the largest in the state by 2015. Charter schools in Davis County account for about seven percent of public school attendees, slightly lower than the state average. According to the United States Census Bureau¹, there are approximately 107,000 children between the ages of five and eighteen living within the county. 67,000 of those children are enrolled in the Davis School District, and approximately 7,500 are enrolled in public charter schools. The remaining 32,500 students are either home schooled or enrolled in a different district, state-wide online school, or a private school.



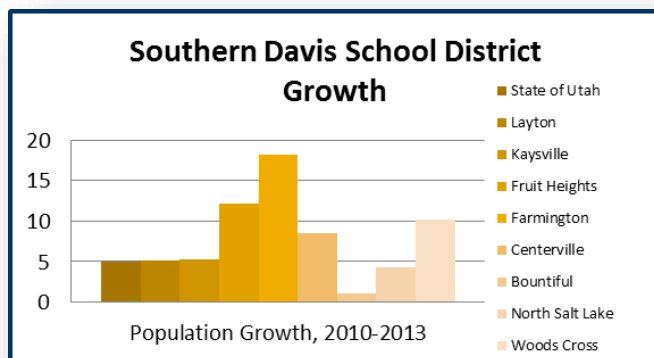
There is currently one private school in the area (Layton Christian Academy) serving students in grades seven through twelve. Within the public school district, there are 59 elementary schools, 16 junior highs, and eight high schools. There are a total of eleven operational charter schools in the area. Of the charters located in or south of Layton, three offer a kindergarten through ninth grade configuration, one offers a ninth through twelfth option, and three offer grades kindergarten through six.

As Davis County is still growing, class sizes are higher than state averages, with 31 students per class, on average, in language arts and math, and 35 in science classes². The district does not subscribe to a particular teaching method. Classical Innovations class sizes are substantially smaller, with approximately 23 students per class. As previously mentioned, and as thoroughly discussed in Section Four, Classical Innovations will use the Socratic Method as the primary instructional practice. This is an option that is not currently available to students in the Davis School District.

¹ Quickfacts.census.gov

²<https://psdreports.schools.utah.gov/Gateway/Report/Display?ReportPath=/Gateway/ReportCard&schoolYear=2013&districtID=308&schoolID=393&schoolNumber=710>

Demographic Information



The percentage of students of ethnic minority and those receiving free or reduced lunch are lower in Davis County than the rest of the Utah, as illustrated.

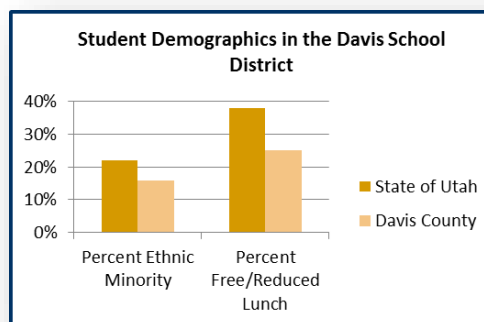
Parts of Davis County, including several cities in the area Classical Innovations intends to possibly locate are areas of high growth.³ The Davis School District anticipates needing to construct 8-10

elementary schools, 2-3 junior high schools, and 1 high school in the next ten years.⁴

Community Trends

An emerging trend in charter schools in Utah is the development of a school housing grades seven through twelve. Traditionally, charter schools in Utah have been strictly elementary, high school, or a configuration of kindergarten through ninth grade. Recently however, several schools have been approved to open or re-configure existing grades to be a complete secondary setting. Paradigm High School recently moved from a 9-12 configuration to a 7-12.

Utah Military Academy, which was approved in April 2014 and opened in August 2014 is set up as a 7-12 configuration and was able to enroll enough students in the short four and half months to open at approximately 90% of authorized enrollment.



Justification for Classical Innovations Enrollment Projections

Often, the enrollment in the seventh and eighth grades drop in the k-9 charter schools, and ninth grade usually takes an even bigger drop as students move into a high school setting. By combining the traditional junior and high schools into one, Classical Innovations will provide students with a seamless secondary experience where they will be accustomed to the teaching methods, school expectations and be ready for the high school academics, where grades on official academic transcripts impact things like college admission and scholarships. Additionally, by configuring the school to house grades seven through twelve, the school is able to be financially viable while being small enough in each grade to recruit and enroll those students who truly desire the very specialized nature of the school.

³ www.quickfacts.census.gov

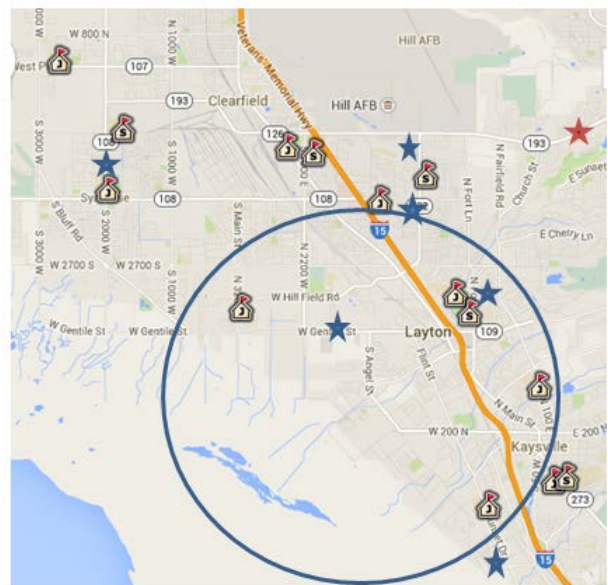
⁴ Davis School District Projected Growth Report, March 2012

Traditional k-9 settings usually offer a broad college preparatory education, but lack a highly focused emphasis. This results in the charters being less competitive with traditional large junior high settings because the same options, and usually more, are readily available. Jefferson Academy in Kaysville is one of example of this. Classical Innovations asserts that by having a specific focus and housing grades seven through twelve in one school, the secondary model will be viable. With the various charter schools serving grades kindergarten through six in the area and the option all families would have for a grades seven through twelve school (currently not an option in Davis County), seats will be filled. In light of Davis County having a slightly lower than average percentage of students attending charter schools, particularly in the high school grades, Classical Innovations asserts grade configuration combined with fewer secondary charter options in the area makes the school appealing and likely to be filled to capacity.

Charter schools operating a secondary-only model with 400-500 students are achieving high enrollment and are financially viable. Examples are AMES, NUAMES, Salt Lake Center for Science Education, Utah Military Academy, Itineris, and Paradigm.

Area Schools Map

The following map illustrates the secondary schools located in the proposed area the school is to be built in. Blue stars represent charter schools offering some type of secondary configuration, the red star indicates the private school, and the buildings represent district secondary schools. The blue circle indicates the area the school is intending to build in.



Why Classical Innovations

Classical Innovations is distinct from other public, private, and charter schools in the area; each of which work together to make a compelling case for the target population to choose Classical Innovations over other schools. Classical liberal arts education;

- Teaching philosophy (Socratic Method) that fosters curiosity, development of critical thinking skills, and a deeper level of curricular understanding;
- Small class sizes;
- Targeted extra-curricular activities and clubs to help students develop the character traits of true citizen leaders.

- The Classical Innovations program builds the skills and knowledge that will enable students to be successful in college and in careers related to the social sciences.

It is difficult to determine current strength or weakness of social studies performance at schools in the intended market as there are no standardized assessments or data collected to analyze. However, the fact that the full spectrum of social studies classes are currently being taught in the district schools indicates interest beyond the basic required courses. This information, combined with the survey conducted by the founding members of the governing body, and existence of key clubs at the local high schools shows a need at some level. There are currently eight charter schools within the area of the Layton zip code 84040; two high schools and seven serving either k-6 or k-9 students. The two current charter high school options in the area are focused on CTE or STEM, leaving parents without a classical education option that goes through the twelfth grade. The remaining four all prepare students for academic success in high school and college, making them good candidates for Classical Innovations. One school in particular, Leadership Learning Academy, has a mission that blends well with that of Classical Innovations.

Section 3: Student Population

Enrollment Projects, Justification, and Intended and Likely Populations

As outlined in the previous subsection “Why Classical Innovations” in Section Two, the Classical Innovations founders assert that filling the school with 420 students is attainable. The school will provide students who are preparing for careers in the social sciences with unique learning, leadership opportunities, and perspective that will prepare them in ways traditional public education cannot. The implementation of the Socratic Method teaching philosophy combined with the use of primary source documents into a real-world context provides students with a unique educational experience. Current educational options in the area do not offer students this preparation. The existence of the following groups, elective classes, and clubs highlight the existing and potential demand for the Classical Innovations Model:

- Communications
- Debate
- AP US Government and History
- Speech
- Theatre
- Psychology
- Sociology
- The local high schools have a chapter of the Kiwanis Club’s Key Club, an extracurricular activity focused on community service. Groups meet weekly, planning and carrying out service projects to better the community. Participation data was not available to Classical Innovations, but the presence of these schools does indicate there are students who are actively involved in serving their communities and would be potential students at Classical Innovations.
- Homeschooling groups and families participating in a program which utilizes the Socratic Method

Due to the nature of the Socratic Method of teaching, it is anticipated that many of the students will be high academic achievers. The inquiry and discussion based approach combined with becoming citizen leaders will likely appeal not only to high achievers, but to students of all abilities who have interest in the social sciences and/or contributing to their communities in meaningful ways. Classical Innovations will support all students in their academic pursuits. For students who may not have the reading and comprehension skills to understand primary source documents, they will be provided with summaries or condensed versions, while also receiving remedial services to increase abilities. Since the Socratic Method will occupy approximately forty percent of instructional time, mentors will have the opportunity to work with students needing additional help during research time, group work, or individual project time.

Meeting the Needs of the Student Population

The use of the Socratic Method in instruction, coupled with leadership development, service opportunities, and extracurricular activities focused on developing skills necessary in

social science careers uniquely and adequately meets the needs of the student population. As these students see history and present societal conditions with perspective gained through use of primary source documents and inquiry-based learning and combine this with public speaking skills, leadership preparation, and a strong sense of community responsibility they will be ready to excel in college and careers to impact their communities for good. This concentrated combination is not something students can currently receive in the Davis County area.

The American Bar Association has identified a set of core skills, values, knowledge, and experience⁵ students must possess in order to be successful in the field of law. Similar lists, comprising the same skill set, exist for those looking to be involved in public administration, politics, social service fields, and non-profit organizations. They are as follows:

- Problem Solving
- Critical Reading
- Writing and Editing
- Oral Communication and Listening
- Research
- Organization and Management
- Public Service and Promotion of Justice
- Relationship-building and Collaboration
- Background Knowledge
- Exposure to the Law

The Classical Innovations academic program helps students develop each of these attributes.

Special Education

Services and Placement

All special education services at Classical Innovations will be in compliance with the Individuals with Disabilities Education Act (IDEA) as it was reauthorized in 2004 and State of Utah Special Education Rules. Section 504, accommodations for regular education students are also followed as directed by law. The Director will oversee the special education department, staffed by properly licensed teachers and paraprofessionals. In addition to special education teachers and aids, Classical Innovations will hire or contract with ancillary service providers, including but not limited to, psychologists, speech-language pathologists, occupational therapists, and physical therapists as needs are identified in individual education maps (IEP). Classical Innovations administration will closely monitor special education caseloads, and follow special education caseload guidelines from the USOE. Funding will come from special education monies, and if necessary, the general school budget, in compliance with Classical Innovations Fiscal Policy.

⁵ http://www.americanbar.org/groups/legal_education/resources/pre_law.html

All students are entitled to a free and appropriate public education (FAPE). Classical Innovations provides services along a continuum, making sure students receive their educations in the least restrictive environment. Some general education students may require one or more accommodations to receive FAPE, and will then be placed on a 504 plan. Students requiring academic instruction or related services in addition to those provided in the regular classroom setting will have an IEP in place. The IEP will determine type(s), frequency and location(s) of service; services may happen in or outside of the regular classroom, for varying amounts of time, based on individual student needs. Some students may receive services through a regular education teacher who is receiving consultation and support from the special education staff. Direct services to students may include receipt of supplemental instruction individually or in a small group setting within the classroom by a special education or regular classroom teacher, an instructional aide being assigned to help within or outside of the classroom, instruction outside of the classroom setting (pull-out), placement in a self-contained classroom, or home and hospital instruction. Classical Innovations has classrooms dedicated to special education, and the entire school building, including restrooms, classrooms, playgrounds, playground equipment, and building accesses will meet the Americans with Disabilities Act (ADA) accessibility requirements.

Classical Innovations will utilize the response to intervention RtI approach for all students who may be struggling with academic skills. With this approach, a teacher identifies the area(s) in which a student is struggling. Strategies are then determined by the teacher and parent, with or without special education consultation, which may be beneficial to the student. If these are not successful, special education consultation and testing will begin in accordance with procedural safeguards. It is the intent of Classical Innovations to provide all students with skills and supports necessary for academic success. One of these tools may be extended school year (ESY) services, which will be addressed in the IEP meeting. Any student qualifying for ESY will receive academic services during the summer at no cost to the family. ESY services may also address social, behavioral, and communication needs.

Qualified Staff

All special education staff at Classical Innovations will be properly licensed and endorsed to work within the special education program. Classical Innovations assures that necessary educational staff and related service providers will be available to ensure all requirements of FAPE are met, in compliance with USBE-SER IX.F. The special education teacher(s) will hold a valid educator's license with the appropriate special education endorsement, and all related services providers (i.e. speech language pathologist, occupational therapist, physical therapist, social worker, adaptive physical education specialist, and psychologist) will have valid licenses specific to their disciplines, in compliance with USBE-SER IX.D and IX. H. The Director of Classical Innovations is responsible for making sure all providers are properly licensed and certified.

The Director of Classical Innovations will be familiar with special education policy and procedure, and will receive ongoing training in Special Education Rules and Regulation through interaction with the Utah State Office of Education Special Education Department. He or she works closely with the special education staff of the school, and all receive annual training regarding policy, procedure, and best practices. An annual report to the Board of Trustees will

indicate the type and amount of training received, as well as a schedule for trainings in the coming year.

The Director and Business Manager will receive training regarding allowable uses of restricted IDEA and Utah State special education funds in compliance with EDGAR, OMB A-133, and USBE-SER IX and X. They will be responsible for ensuring adequate documentation is maintained and available to support the use of all restricted funds.

Policies

Classical Innovations will provide the Utah State Office of Education a Special Education Policies and Procedures Manual for approval prior to November 1 of the first operational year. This manual will be in compliance with Utah State Board of Education Special Education Rules and IDEA, as it was reauthorized in 2004. Staff will be provided with ongoing professional development in key areas identified by the Director and special education department.

Child Find

In order to locate students needing special education services, Classical Innovations will actively participate in child find activities. Upon entrance to the school, initial paperwork will ask if the student has a current IEP. If an IEP is in place, records from the previous school will be requested and special education services will begin immediately in accordance with the existing IEP. The IEP team will then determine whether to adopt the existing IEP or convene a meeting for the purpose of constructing a new IEP. Teachers will receive training on identifying students who may have special education needs at the beginning of each year, with ongoing training through staff meetings or written communication from the Director and/or special education department. In addition, teachers will be provided additional training in all other relevant topics in regards to special education as needed throughout the year.

Procedural safeguards are in place and compliant with IDEA laws. When a child is identified as potentially needing special education services, a request for an initial evaluation is made to the special education department. This request can be generated by a parent or teacher. Before testing can begin, the parents must sign a “consent to test” form. Upon receipt of the consent to test, the initial evaluation to determine eligibility for IDEA Part B services must be completed within 45 days. If the referral is generated by Classical Innovations and parents do not return or refuse to sign the consent to test, the initial evaluation may occur under the due process procedures established by the Utah State Office of Education Special Education Rules. Evaluations will utilize a variety of appropriate assessments, both formal and informal, and will be comprehensive enough to adequately address all areas of need. All assessments will be valid and reliable, and administered by trained and qualified personnel. Observations may also be included as part of the assessment. Parents will receive a copy of the evaluation results, and if the student is determined to be eligible for Special Education, an IEP meeting is scheduled.

Parents will receive a prior written notice about the meeting, which will indicate the mutually agreed upon time, location, purpose of the meeting, as well as who will be in attendance. Parents must also receive a copy of procedural safeguards prior to the beginning of services, and annually thereafter. The IEP meeting is held within 30 calendar days of eligibility determination with the IEP team, which will include all of the following:

- Parent(s)

- At least one of the student's regular education teachers
- Special education teacher
- Local Education Agency (LEA) representative (Director or Special Education Director at Classical Innovations)
- Someone who can interpret assessment results to the team, and may be one of the team members listed above

The team may also include any of the following:

- Related service providers
- The student, whenever possible and appropriate
- Someone with special knowledge or expertise if invited by the parent, or Classical Innovations with parental consent

Should a parent not be able to attend the IEP meeting, alternative participation methods such as conference calls or video conferences may be utilized. A meeting may be conducted without a parent present if Classical Innovations has made and kept record of attempts to arrange a mutually agreed upon time and place. Records will include actual and attempted communication made and results thereof. Copies of correspondence and any responses, as well as detailed records of visits made to the parent's home or place of employment and results of those visits.

During the IEP the type(s) of service the student needs, along with where they will occur and the frequency and duration (defined as placement) will be determined. The IEP must include a statement of the student's present levels of academic achievement and functional performance, including how the student's disability affects the student's involvement and progress in the general education curriculum. It must also include measurable goals designed to meet the student's needs resulting from the disability that allow the student access, involvement, and progress in the general education curriculum. They must meet any other educational needs resulting from the disability, assistive technology the student may need, how progress will be measured and reported, and alternative assessment means and methods with justification if it is determined the student is unable to use the regular State-wide assessments. Other elements may be included as determined by State and Federal law. The IEP is valid for one year, and must be reviewed and have a new IEP in place prior to the expiration of the current IEP. A meeting to review and/or revise a current IEP may be held at any time, and must follow the procedural safeguards of a regular IEP meeting.

Special Education Records

If parents have complaints, all grievance policy, as laid out in the most current Utah Special Education Rules will be followed (last updated 12/09, pages 109-116). This includes requests for amendment of student records as well.

The special education department, under the direction of the Director, will maintain proper forms and paperwork that are available and used, including, but not limited to:

- Procedural Safeguards Notice

- Prior Written Notice
- Notice of Meeting
- At Risk Documentation
- Referral
- Consent to Evaluate/Re-evaluate
- Review of Existing Data
- Evaluation Summary Report
- Determination of Eligibility
- Individual Education Program
- Transition Plan
- Services Plan
- Consent for Initial Placement
- Change of Placement
- Notice Regarding Age of Majority Rights
- Summary of Academic Achievement and Performance
- Record of Access
- Access Authorization

When a student on an IEP or 504 plan transfers to Classical Innovations from another school, the special education department will conduct a review of the records within thirty days, then do one of the following:

- If the student has transferred from within the state, the team will adopt the previously held IEP, or develop, adopt, and implement a new IEP that is consistent with Federal regulations and USBE SER rules.
- If the student has transferred from out of state, the IEP team will conduct an evaluation, if determined to be necessary by the LEA; and develops a new IEP, if appropriate, that is consistent with Federal and State law.

All transferring students will receive services similar to those required in the existing IEP until the review has been completed and the previous IEP adopted or a new one is adopted and implemented.

All Federal Education Right to Privacy Act (FERPA) laws will be followed at Classical Innovations. The confidentiality of personally identifiable information at collection, storage, disclosure, transfer, and destruction stages will be protected and handled in a timely manner. The Director has responsibility for ensuring this confidentiality, in conjunction with the special education director. All persons collecting or accessing student information are required to receive instruction regarding policies and proper procedures for safeguarding information. A current list of staff with access to records is posted for public inspection, and records are kept in a locked filing cabinet in the Special Education Director's office. A record is kept in each file documenting persons who have reviewed the file, including the name of the party, the date

access was given, and the purpose for which the party is authorized to use the records. Additionally, parents must be given access to records when requested unless Classical Innovations has been advised the parent does not have legal access to due guardianship, separation, or divorce situations.

Parents must receive notice prior to records being transferred, and when collected personally identifiable information is no longer needed, the parents (or student if age 18 or older) must be notified, and information must be destroyed at their request. A permanent record of student's name, address and phone number, grades, attendance record, classes attended, grade level completed, and year completed shall be maintained without limitation. Records may be considered "no longer needed" and may be destroyed three years after the student graduates or three years after the student turns 22. In accordance with FERPA, the rights of privacy afforded to parents are transferred to the student at age 18, unless declared incompetent by a court order. Prior written notice will be provided to the student and the parent.

English Language Learners

Classical Innovations will comply with all state and federal laws and rules as they relate to providing services to English Language Learners.

Upon identification of a student requiring ELL services, a plan for instruction will be put in place depending on current level of proficiency. Classical Innovations provides a continuum of services for ELL students, based on a three-tier model, as outlined below. An ELL coordinator will determine the needed level of support and work with teachers to ensure all services are being delivered. Classical Innovations will recruit teachers who possess an ESL endorsement, hopefully having at least one ESL endorsed teacher in each department.

Sheltered English Instruction is the primary method used for ELL learners at Classical Innovations. Sheltered instruction helps teachers create lessons and scaffold activities that build on students' prior knowledge, helps students learn to use the academic language required of them, and allows them to do something purposeful with that new knowledge. This method is best suited for students who have already developed a foundation in the English language.

When a student's level of proficiency does not permit them to function and learn in the classroom using Sheltered English Instruction, ELL pull out services will be provided. These will typically be in small groups, determined by level of language proficiency.

If students require intensive ELL services, structured English Immersion will be utilized. In this setting students are provided with intensive English language instruction while receiving some or all of the core content in their native language while they are gaining proficiency.

Throughout the school, staff will utilize a range of research-based instructional methods that assist English Language Learners. This includes Total Physical Response, and Academy

Language Scaffolding and other methods⁶. The school's staff will be using Professional Learning Communities to further innovate teaching strategies for English Language Learners.

Students will continue to be assessed using formative and summative assessment, with proficiency being determined by the WIDA ACCESS assessment tool. As students achieve full proficiency, they will be exited from the program and monitored for two years as prescribed in Attachment A.8.4. If at any time during the monitoring time it is determined a student needs to receive additional ELL services the process is started again.

Homeless Students

In compliance with the McKinney Vento Education Assistance Act, Classical Innovations will serve homeless students, permitting them immediate access to the school if space is available regardless of whether necessary documentation (i.e. immunization records, birth certificate) is available or not, will appoint a homeless liaison, and provide other services as dictated by law.

Section 504 Services

In cases where a student at Classical Innovations requires one or more accommodations in order to receive a free and appropriate education (FAPE), an accommodation plan will be put in place as required by section 504 of the Rehabilitation Act of 1973. The special education department will oversee development, implementation, and oversight of such plans under the direction of the school Director.

Outreach and Recruitment

Community outreach and student recruitment will use both active and passive methods. Classical Innovations will create a website, and may create a Facebook page, Twitter account, or use other forms of social media. Advertisements will be placed in newspapers, at local libraries, community centers, and other public places. Direct mail or other methods of delivering printed materials may also be employed.

To recruit specifically among the target population, Classical Innovations will make contact with Key Club International, have a presence at secondary grade level speech, debate, and drama competitions, provide information to homeschooling groups whose members utilize the Socratic Method of teaching in some form, and coordinate with local Rotary Clubs, as both the organization and the school have a purpose of providing community service.

Admission and Enrollment

Any student living in the state of Utah is eligible to apply for admission to Classical Innovations. The school will not discriminate against any individual on the basis of race, national origin, gender, religion, or socioeconomic status and in compliance with IDEA and ADA legislation. Once a student is enrolled at Classical Innovations, they need not apply for the lottery each year. If a student leave Classical Innovations and later desires to return, they will

⁶ http://educationnorthwest.org/webfm_send/459

not receive preferential enrollment unless there are extenuating circumstances and preferential status is approved by the Board.

Classical Innovations will advertise an open enrollment period of at least thirty days annually. If more students enroll than there are seats available, a lottery will be held. This lottery will be in compliance with all applicable state and federal guidelines, as presently constituted and as they are updated in the future. Current state law is UCA 53A-1a-506.

For those members of the community who are designated as founding members, their children may receive preferential enrollment. A founding member is defined as a person who has played a key role in the establishment of the school, and will be determined by the founding board prior to the lottery for the school's first year. Children of full-time staff are also eligible for preferential enrollment. Students receiving preferential enrollment will not exceed five percent. A monetary fee or donation of time, goods, or services is prohibited by Classical Innovations as a mode of securing student acceptance at the school, and a fee to attend the school is not assessed.

Siblings of current Classical Innovations are exempt from the lottery, provided parents provide the school with notice of intent to enroll prior to the lottery.

Lottery Policy

Opening Year Lottery

Classical Innovations will conduct an open enrollment period from January 1 through February 15, during which the school will conduct extensive advertising of the school. Families will be able to attend an open house in order to better understand the mission, expectations and programs of the school. Enrollment for the lottery will be done electronically through the school's website. A lottery open to the public will be held between February 20 and March 1, as determined by school administration. The lottery procedure will be as follows:

- Each student applying will receive a number through a random lottery.
- Grades will be filled beginning with tenth grade and working down.
- Siblings automatically gain admittance once one member of the family is selected in the opening year lottery, unless there is no room in the specified grade.
- Siblings who are not selected through the lottery will be placed on the sibling priority list. These students will be the first contacted when seats in corresponding grades become available.
- The sibling priority list will be compiled based on original lottery number.

General Lottery Procedure

Classical Innovations will conduct an open enrollment period annually from January 1 through February 15, during which time advertising of the school will occur within the community. Families will be able to attend an open house in order to better understand the mission, expectations and programs of the school, and enrollment for the lottery will be done

electronically through the school's website. A lottery open to the public will be held between February 20 and March 1, as determined by school administration. The lottery procedure will be as follows:

Under Utah code 53A-1a-506(2)(b)(i and ii) returning students and siblings of returning students will be given preferential enrollment on a space available basis. Any siblings not given preferential enrollment due to space unavailability will be placed at the top of the wait list. If there are additional seats available and more students applying than available seats, a lottery will be held, as follows:

- Each student applying will receive a number through a random lottery.
- Available seats will be filled starting with twelfth grade and working down.
- Siblings of students selected in the general lottery will be granted sibling preference in compliance with Utah Code 53A-1a-506(2)(b)(i and ii) or placed on the sibling priority list. Students who gain enrollment via sibling preference will maintain such preference as long as the originally selected sibling remains enrolled at the school.
- The sibling priority list will be compiled based on original lottery number.
- Students not selected in the lottery or on the sibling preference list will be placed on the waiting list after sibling preferences in order of lottery selection number.

Enrollment Preference

In compliance with Utah Code 53A-1a-506(2)(b)(i and ii) the following categories of prospective students receive enrollment preference, not to exceed five percent of maximum enrollment which only applies to students of founders and children of teachers/staff:

- Students of Founding Members. Founding Members are defined as those who have actively participated in the development of the school as determined by the founding board.
- Students enrolled the previous year.
- Siblings of students currently enrolled.
- Children of full-time teachers and other staff as allowed by law.

Exceptions to Enrollment Preference

Classical Innovations recognizes that it is not in the best interest of a child to be moved from school to school. Unnecessary change can cause lack of continuity in curriculum and can hamper a feeling of community for the child and family. For that reason exceptions to the enrollment preference list are as follows:

- Children of founding members who leave the school will not be given priority if they return unless there are extenuating circumstances such as, but not limited to, family illness or military duty. Such situations will be reviewed by the Board of Directors on a case by case basis.
- Students who leave the school, and have a remaining sibling, will not be put on the sibling preference list if they wish to return. They may participate in the general lottery.

Accepting Admission and Forfeiting Admission

Students who are selected through the first lottery to attend Classical Innovations will be notified by email, phone call, and/or U.S. mail of their acceptance. It is the parent or guardians' responsibility to make sure all contact information is correct and accurate. Parents will have two weeks from the date of the first lottery to respond by returning the acceptance form by email, in person or via U.S. mail. Forms returned by U.S. mail must be delivered to the school by the due date.

Students who do not respond within the two week period forfeit their enrollment spot and can reapply for the lottery during the next open enrollment period, generally the following year or placed at the bottom of the wait list for the current year. If there are additional available seats, another round of acceptance phone calls and emails will be issued. Students in the second and subsequent rounds will have 48 hours from the notification date to respond or their seats will be forfeited. Forms returned by U.S. mail must be postmarked by the due date or it will not be accepted.

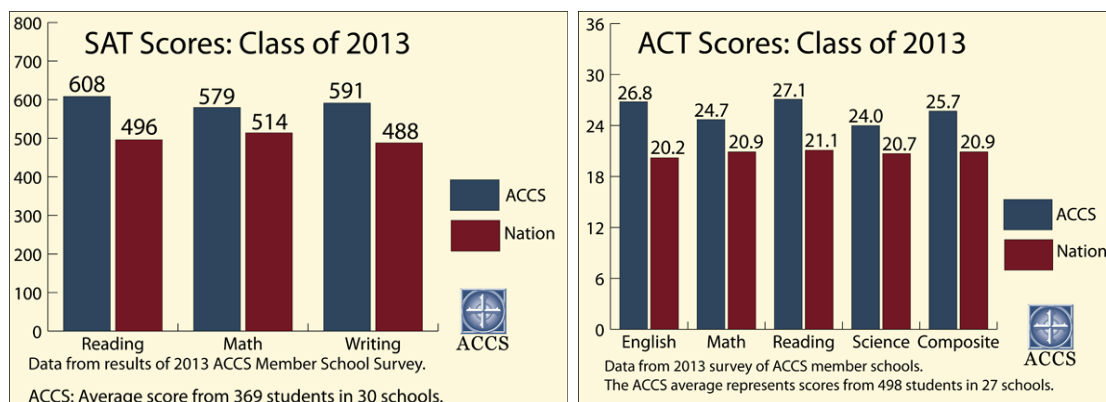
Section 4: Program of Instruction

Educational Philosophy

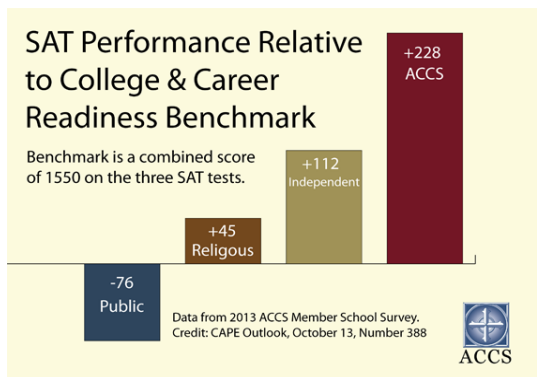
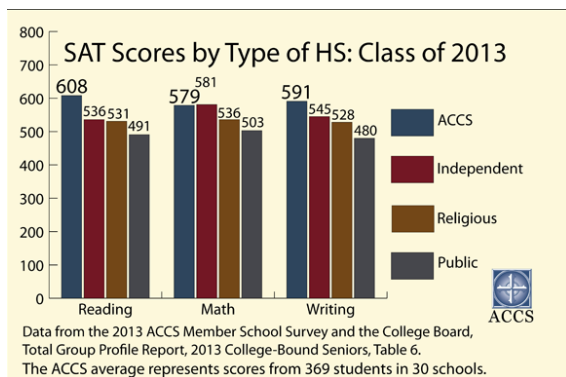
Classical education in today's world is generally thought to be a broad-based study of the liberal arts and sciences rather than a practical or pre-professional education.⁷ Classical Innovations does have a curriculum rich in the liberal arts and science, but also embraces the more traditional belief that education is a *trivium*, meaning there is a three part process for training the mind. The first years, often referred to as grammar or elementary school is where students learn basic skills, essentially gaining the building blocks all other learning is built on. The second stage, commonly referred to as the logic stage, occurs during the middle school years. Students in this phase are becoming more concerned about the "why" of things. For example, rather than just reading about the Revolutionary War and seeing it as a story, students begin to think about why the war occurred, why people chose their particular side of allegiance, and why the winning side won. The final stage is referred to as the rhetoric stages, where students apply the rules of logic learned in middle school to the foundational information learned in the early grades and expresses his conclusions in clear, forceful, elegant language.

All core classes at Classical Innovations will be in alignment with state core curriculum and graduation requirements, and require students to develop and apply critical thinking skills. Elective classes and extra-curricular activities will be selected based on their ability to further develop critical thinking.

The classical educational model has been proven to be very effective when used in a whole school. The Association for Classical and Christian School consists of a group of private schools that fully implement classical education. The results weigh heavily in favor of classical education, as illustrated below. All data was taken from accsedu.org and is used with permission.



⁷ Unger, Harlow G., ed. (2007), "classical education", Encyclopedia of American Education (New York: Facts on File) 1: 239, ISBN 978-0-8160-6887-6



Methods of Instruction and Delivery

Classical Innovations uses the Socratic Method as the primary instructional method. Simply defined, the Socratic Method uses a four part approach to help students develop critical thinking skills and understand the logic of a concept or situation. It is done in a seminar or discussion setting, with the teacher acting as a guide and mentor rather than a lecturer. The first stage in the process is to elicit information about the subject and get the student to begin thinking. This is where any background information necessary for the discussion is learned, and students ask questions. The second step in the process is for the instructor to have the students clarify their thesis about the subject in question. The third step is where the class engages in a discussion to test the hypothesis or logic. The final step is for students to decide if their hypothesis is correct or to revise as necessary. This method of teaching requires the instructor to be well versed in the content, in order to competently guide the discussion and help each student master the content. It also requires a small group setting to be effective.

The need to develop critical thinking skills is essential for success in life. In looking at the development of critical thinking skills in the Los Angeles area, Thomas came to the following conclusions, backed up by additional research found within his report⁸:

- All teachers need to be educated in the philosophy and methods of teaching critical thinking skills in pre-service and in-service education
- A concerted effort needs to be made to assure that all students, regardless of achievement level, be given opportunity to learn to think critically
- Critical thinking should become an organizing core for other school reforms
- Textbooks need more critical thinking language and open-ended questions so as to encourage independent cognitive development and reasoning skills in students

Research supports use of the Socratic Method. Students who are taught consistently using the Socratic Method have shown significant increases in the following areas⁹:

- Reading comprehension and problem solving skills

⁸ Thomas, P.E. "Critical Thinking Instruction in Selected Greater Los Angeles Schools" Azusa Pacific University, May 1999.

⁹ http://ims.ode.state.oh.us/ode/ims/rrt/research/Content/socratic_seminar_what_we_know.asp

- Connections between seminar material and other content areas and real life
- Communication skills, both listening and speaking
- Motivation
- Engagement
- Empathy and respect toward others

The development of critical thinking skills in a classical education approach can be beneficial for students of lower socioeconomic status. In Omaha, Nebraska, West Side High School transitioned to a Socratic Method approach, bringing ACT and SAT test scores to all-time school highs while the free and reduced lunch percentage increased from five to over twenty percent.¹⁰

Students who are intellectually gifted especially benefit from the Socratic Method of teaching, as it allows them to develop and utilize their thinking and logic skills at higher levels. The differentiation that many teachers have to work to achieve in today's traditional classroom happens automatically with the Socratic Method.

The use of primary source documents as the main student curriculum whenever possible helps establish relevance and meaning. Research has shown that students who utilize primary source documents as text as means for learning both course content and critical thinking skills improved in both areas and that end of course knowledge was not lessened by having been taught using the Socratic Method.¹¹

Professional Development

Classical Innovations acknowledges the tremendous need it has to provide teachers with professional development in order to ensure they are able to properly teach using the Socratic Method. The Classical Innovations Board is also aware of the critical importance of finding the right curriculum and ensuring that the professional development and curriculum work together cohesively. In evaluating potential options, Classical Innovations found Williamsburg Educational Services. This company provides a range of services, including professional development and a classical curriculum rooted in original source material. They currently operate a fully accredited private online high school, Williamsburg Academy. They also act as an ESP for Leadership Academy of Nevada, an online charter school in Nevada serving grades 6 - 12. The Williamsburg Curriculum is currently being used in online schools, and because it is based on a classical education model utilizing the Socratic Method, it can easily be adapted for use in brick-and-mortar schools using Canvas Learning Management System as the main delivery platform. Classical Innovations intends to use Williamsburg Educational Services as a

¹⁰ Crook, J. "Staff Development Program Utilizes Critical Thinking Instruction to Improve Student Performance on ACT and SAT Tests, and it Critical Reading, Writing, and Math, December 2006, www.criticalthinking.org

¹¹ Reed, J. Effect of a Model for Critical Thinking on Student Achievement in Primary Source Document Analysis and Interpretation, Argumentative Reasoning, Critical Thinking Dispositions and History Content. Doctoral Dissertation, October 1998

vendor for professional development and curriculum, as they best meet the needs of the school based on the findings of our research. The extent to which Classical Innovations will use services from Williamsburg will be evaluated and determined by the Board and the academic director during the planning year.

The effectiveness of professional development will be measured through formal evaluation, as outlined in the mission specific goals. The effectiveness of teachers' ability to implement the Socratic Method will be evaluated through classroom observation and evaluation, and will help school administration understand what additional training teachers may need and then work with current staff who excel in utilizing the Socratic Method, Williamsburg, or another provider to provide faculty with the necessary professional development and support. If school wide deficiencies exist in use of the Socratic Method, the results will reflect on the evaluation and influence the decision regarding retention of professional development trainers. Changes in training will be made as needed.

Core Curriculum

Classical Innovations will adhere to all state standards in the development and teaching of curriculum. Some classes, such as math and science, will require a traditional text book with some supplementary primary source documents and/or other curriculum. Other classes, like Language Arts and social studies, will require a significant amount of work on the part of the school to teach using primary source documents and the Socratic Method. In order to ensure the school is ready and prepared with appropriate materials before school begins, Classical Innovations will implement the following plan.

1. Upon charter approval the board will establish a curriculum committee. This group will be tasked with assessing existing curricular options, among them the Williamsburg Academy's program.
2. The curriculum committee will create various sub-committees, responsible for locating primary source documents and other curricular resources based on the core content requirements outlined by the state.
3. All materials will be collected and provided to the academic director upon his/her being hired.
4. The academic director will evaluate options, determine the best route in consultation with the board, and begin creating class materials and curriculum lists for each class and/or working with a vendor to provide appropriate curriculum.
5. The Classical Innovations board anticipates there will be a combination of vendor provided curriculum and school-generated curriculum.
6. Teachers will be hired early enough in the process that they can actively engage and participate in course-specific curriculum planning and design.
7. The Director will present a course outline for each class detailing Core Standards and Objectives taught and create a spreadsheet illustrating that all Core Standards and Objectives for each grade are covered in the course of the year. This document will be provided the Board no later than July 1, 2016, and is to be updated on an annual basis.

Accountability

Measuring and reporting student progress is a key to the overall success of the school. Classical Innovations has established achievement goals in this document, which will be updated annually through the school's strategic plan. All goals will be SMART, and will require the use of valid and reliable measurements. The Board will produce an annual report which will be provided to stakeholders reporting on school achievement. When necessary, the school may involve parents and other stakeholders to participate in a committee to identify possible solutions for areas of concern.

Assessment

Classical Innovations understands the importance of measuring student achievement on an ongoing basis to ensure students are making progress and mastering content. It is only

through valid and reliable assessments that this progress can be monitored. Classical Innovations will comply with all state and federally mandated testing.

The Socratic Method of teaching utilized at the school requires the teacher to constantly be doing formative assessment during the course of discussion. Other measures of formative assessment include classwork, homework, research papers and projects.

Summative assessment will be in the form of required standardized tests, and the school will administer an independent standardized test in addition to state mandated testing to monitor progress from year to year, as well as achievement in academic core classes and critical thinking skills. The Metropolitan Achievement Tests published by Pearson is one the school is considering, as it does measure critical thinking ability, which is the basis of the school.

Other summative assessment will be ongoing within the school's curriculum, and results will be discussed by the academic teams within the school to improve student achievement. The school's assessment director will coordinate this effort and work with teachers on an ongoing basis to help them identify areas of student need and resources to help them. The assessment director will be selected from among the administrative or teaching staff, and will be responsible for scheduling, oversight of testing training and administration, analyzing, compiling, and disseminating data to stakeholders.

Data collected will be used to determine school-wide, grade-level, or classroom trends that teachers need to address, as well as identify students who are experiencing difficulties. Upon identification, the administration will conference with teachers, as well as parents and students when appropriate to establish a plan for correction. This plan will be monitored at weekly team meetings and adjusted as necessary.

Academic achievement goals will be set in compliance with the State Charter School Performance Standards as well as mission specific goals. The administration will be responsible for reporting academic progress to the board on a monthly basis. The Board and administration will develop a strategic plan, which will be updated annually, to evaluate past performance, determine if changes are needed to the school program, and update, modify, or set new goals.

Discipline

The Socratic Method of instruction requires a school culture of respect—respect for one's self, respect for the rights and opinions of others, and respect for staff. School administration and staff will strive to foster such a culture through example, reinforcement of positive behavior, and remediation when necessary. Students need to feel safe—physically, intellectually, and emotionally—in order to have the fullest and most meaningful education. School administration, faculty, and staff will be required to be vigilant in creating a safe and positive culture.

When a student violates a school rule, he/she will be required to use Socratic-type questions to analyze behavior, determine how to make and carry out restitution, and determine how he/she will prevent such behavior in the future. Minor infractions should be handled in the classroom by the teacher; repeat offenses will initiate a conference between the parent, student, teacher(s), and possibly school administration. Major infractions will be handled by the school administration, following the approved disciplinary policies.

Classical Innovations will comply with all laws and regulations relating to student discipline, currently found in Section 9 of Utah Code UCA53A-11. The school's policy for discipline, suspension, and expulsion is as follows.

I. Purpose

The purpose of the policy is to foster a safe, positive environment for learning by teaching the practice of self-discipline, citizenship skills, and social skills.

II. Teaching self-discipline, citizenship and social skills

In every area of education if students lack skills we teach them. We believe the same should be true for student behavior, including self-discipline, citizenship skills, and social skills. The school will provide supports to students and the community at large by expressly teaching students these skills.

A. Plans and policies shall be developed for classroom and student management which will include:

1. Written standards for student behavior expectations, including school and classroom management
2. Effective instructional practices for teaching student expectations, including self-discipline, citizenship, civic skills, and social skills
3. Systematic methods for reinforcement of expected behaviors
4. Uniform methods for correction of student behaviors
5. Uniform methods for at least annual school-level data-base evaluations of efficiency and effectiveness

B. On-going staff development shall be provided for all staff regarding:

1. Effective instructional practices for teaching and reinforcing behavior expectations
2. Effective intervention strategies
3. Effective strategies for evaluation of the efficiency and effectiveness of interventions

C. Classical Innovations personnel shall determine the range of student behaviors and establish a continuum of administrative procedures that may be used by school personnel to address student behavior, including:

1. Classroom level strategies
2. Building level strategies

III. Range of Behaviors and Continuum of Procedures

Classical Innovations personnel shall determine by consensus student behavior infractions that should be dealt with at the classroom level and building level.

A. Minor infractions are defined as infraction of school rules that are usually handled by teachers in the classroom. Chronic or excessive minor infractions can become major infractions and result in office discipline referral to school administration. Minor infractions can result in a loss of privileges, phone calls home, and in-school suspension. The following are minor infractions:

1. Dress code violations
2. Disrespect, including put downs, talking back, and defiance
3. Public displays of affection
4. Inappropriate language and actions
5. Tardies
6. Disruptive behavior including talk-outs, chronic talking, and out of seat
7. Horseplay
8. Chewing gum
9. Bus misconduct
10. Noncompliance

B. Major infractions are defined as severe infractions of school rules that result in immediate office discipline referrals to school administration and usually lead to out of school suspension. Major infractions include:

1. Safe school violations, including assault, threats to kill/harm, discrimination
2. Drug, alcohol, and tobacco violations
3. Physical aggression including fighting and throwing objects at a person
4. Any criminal action occurring at school such as vandalism, fire setting, possession or use of combustibles, forgery, and theft
5. Chronic or excessive abusive language, truancy, tardies, or non-compliance
6. Bullying and harassment

C. The following school personnel shall be authorized to issue notices of disruptive behavior. These personnel shall provide documentation of habitually disruptive student behavior prior to court referral.

1. Building administrators

IV. Training

Classical Innovations will provide training and strategies for students and staff in the following:

1. Overt aggression
2. Relational aggression
3. Cyber bullying

4. Intervention skills
5. Social skills
6. Adult supervision of students
7. Provide for student assessment of the prevalence of bullying in school

V. Prohibited Conduct and Related Discipline

Prohibited conduct is forbidden at school, on school property, including school vehicles, and at any school activity. A serious violation that threatens or harms a school, school property, a person connected with school, or property associated with a person connected with school is forbidden regardless of where it occurs.

A. A student WILL be removed from school for at least 1 year for a serious violation involving the following:

1. A real weapon or
2. Explosive or flammable material or
3. Actual or threatened use of a look-alike weapon with intent to intimidate or cause disruption.

Exceptions may be made on a case by case basis through the Board of Trustees.

B. A student WILL be removed from school for the following:

1. Possession, control, actual or threatened use of a real weapon, explosive, noxious, or flammable material;
2. Actual or threatened use of a look-alike weapon with intent to intimidate or cause disruption;
3. The sale, control or distribution of a drug, controlled substance, imitation controlled substance, or drug paraphernalia;
4. Using or threatening to use serious force;
5. The commission of an act involving the use of force or the threatened use of force which if committed by an adult would be a felony or class A misdemeanor; or
6. A serious violation of Section II.C affecting a student or staff member.

C. A student MAY be removed from school for the following:

1. Willful disobedience or violating a school or district rule;
2. Defying authority;
3. Disruptive behavior;
4. Foul, profane, vulgar, or abusive language;
5. Defacing or destroying school property;
6. Truancy;
7. Theft;
8. Posing a significant threat to the welfare, safety or morals of a student, school personnel, or the operation of the school;
9. Fighting;

10. Bullying (including, but not limited to, behavior intended to cause harm or distress in a relationship with an imbalance of power, especially if repeated over time);
11. Possessing, using, controlling, or being under the influence of alcohol, a drug, an imitation drug, drug paraphernalia, or misusing any substance;
12. Possessing or using tobacco;
13. Hazing, demeaning, or assaulting someone, or forcing someone to ingest a substance;
14. Inappropriate exposure of body parts;
15. Sexual or other harassment; or
16. Gang-related attire or activity.

The decision to remove or to discipline in some other way is made by the Director based on all the circumstances.

D. The type and length of discipline is based on factors such as previous violations, severity of conduct, and other relevant educational concerns.

E. When appropriate, students will be placed on remedial discipline plans.

F. School personnel may use reasonable physical restraint, if necessary, to protect a person or property from physical injury or to remove a violent or disruptive student.

G. If damage or loss of school property occurs, official report cards, diploma, and transcripts may be withheld until payment for the damage is received or the lost property is recovered.

VI. Habitual Disruptive Behavior

A. Definitions

Qualifying minor means a school-age minor who is at least 9 years old or turns 9 years old at any time during the school year.

Disruptive behavior means behavior outlined in Sections IV. .A, B and C above.

B. Notice of Disruptive Student Behavior

1. A Notice of Disruptive Student Behavior may only be issued to a qualifying minor.
2. A Notice of Disruptive Student Behavior may only be issued by a school administrator or a designee.
3. A Notice of Disruptive Student Behavior shall be issued when the student has:
 - a. engaged in disruptive behavior (that does not result in suspension or expulsion) 3 times during the school year; or
 - b. engaged in disruptive behavior that results in suspension or expulsion once during the school year.
4. A Notice of Disruptive Behavior requires that the student and parent meet with school authorities to discuss the disruptive behavior.
5. The student and/or parent may contest a Notice of Disruptive Student Behavior in the following manner:
 - a. If the notice is written by an assistant administrator or other designee, the appeal is made to the Director;
 - b. If the notice is written by the principal, the appeal is made to the Board of Trustees.

6. A school representative shall provide to the student's parent a list of resources available to assist the parent in resolving the student's behavior.
7. The school shall establish procedures for the school counselor or other designated school representative to work with a student in order to attempt to resolve the student's behavior problem before the student becomes subject to the jurisdiction of the Juvenile Court.

C. Habitual Disruptive Student Behavior Citation

1. The Habitual Disruptive Student Behavior Citation may only be issued to a student who has received a Notice of Disruptive Student Behavior and:
 - a. Engages in disruptive behavior (that does not result in suspension or expulsion) at least 6 times during the school year;
 - b. Engages in disruptive behavior that does not result in suspension or expulsion at least 3 times during the school year and engages in disruptive behavior that results in suspension or expulsion, at least once during the school year; or
 - c. Engages in disruptive behavior that results in suspension or expulsion, at least twice during the school year.
2. A Habitual Disruptive Student Behavior Citation may only be issued by the school Director.
3. The citation shall be mailed by certified mail to, or served on, the parent of the student.
4. A student to whom a Habitual Disruptive Student Behavior Citation is issued shall be referred to the Juvenile Court.
5. Within five days after the citation is issued, a representative of Classical Innovations shall provide documentation to the parent and the court of the efforts made by a school counselor or representative.
6. The Director will cooperate with the Juvenile Court in providing other information as needed, including but not limited to attendance, grades, and behavioral reports.

VI. Searches

1. School personnel may search students, lockers, personal property, and vehicles parked on school property based on reasonable suspicion.
2. School personnel may also conduct random searches that might include all lockers and other school property.

VII. Suspension and Expulsion Defined

1. Suspension is disciplinary removal from school with an offer of educational services.
2. Expulsion is a disciplinary removal from school by the Board of Trustees for more than 10 school days without an offer of alternative educational service.

VIII. Readmission and Admission

1. If a student is removed from school under II.A, readmission depends upon satisfactory evidence that the student will not be a danger to self, others, or school property.
2. If a student is removed from school under II.B or C, the student may be readmitted after the parent/guardian meets with school officials to make a plan to correct the

behavior(s) and after the student completes both the days of suspension and any conditions imposed.

3. Classical Innovations may deny admission to a student who has been expelled from any school in the last twelve months.

IX. Due Process

1. If a student is removed from school or otherwise disciplined under this policy, the student has the right to meet with the site administrator to tell his/her side of the story.
2. If the Director recommends removal for more than 10 school days, a committee composed of the Board of Trustees will hear the case at the school with the student, the parent or guardian, the Director, and others as necessary. This hearing will be held within 10 school days of removal from school.
3. If a student is removed from school for more than 10 school days, an appeal of the decision may be made in writing to the Board of Trustees within 10 school days of the decision. The parent or guardian is responsible to plan and to pay for any educational services not provided by the district during the suspension.

X. Students with Disabilities

If a student has a qualified disability, the Director will explain the separate procedures that may apply based on the procedural safeguards under the Individuals with Disabilities Education Act (IDEA) or Section 504 of the Rehabilitation Act.

Parental Involvement

Classical Innovations will incorporate parent volunteers into the school through traditional means in helping with activities, special events, fundraising, material preparation and classroom volunteer opportunities. Using the Socratic Method in teaching and helping students develop perspective Classical Innovations faculty will reach out to parents to find areas of expertise and diverse life experience and invite parents to participate in relevant discussions; bringing an opportunity of parental involvement in classroom instruction not typically seen in traditional educational settings.

Assurances

Career Education:

- ✓ We do not intend to offer career education.

Distance or Online Education:

- ✓ We do not intend to offer distance and/or online education.

Gifted Education

- ✓ We do not intend to offer gifted education.

Four-Year College and/or University Affiliation

- ✓ We do not intend to partner with a four-year college or university or offer early college options

Section 5: Performance Measures

SMART Goals

Classical Innovations will meet the standards expected of charter schools authorized by the State Charter School Board as outlined in the Charter School Performance standards. However, CI will not be satisfied with simply meeting minimum academic standards expected of all schools. The school's classically-based philosophy and Socratic method of instruction will produce better academic results, and those expectations will be codified by the board in a series of mission-specific goals. These goals, included below, are consistent with the school's mission and educational philosophy and demonstrate the board's confidence in the efficacy of the program on student outcomes.

Goal 1: 80% of Classical Innovations students will apply skills of articulating thoughts and ideas coherently through competing on the school debate team or public speaking contests or events annually.

Goal 2: Classical Innovations students demonstrate academic excellence through receipt of scholarships. 75% of students in the school's second operational year will receive scholarships, 80% in year three, 85% in year four, and 90% in year five and subsequent years.

Goal 3: 100% of Classical Innovations students will serve as leaders in their communities by annually planning, organizing, and completing a service project.

Goal 4: 100% of seniors demonstrate adequate critical thinking skills through completion of a senior thesis.

Goal 5: 95% of teachers will attend professional development training specific to the Socratic Method at the beginning of the year and pass a comprehensive exam, including teaching, to demonstrate competence in the method.

These goals are:

Specific—Each goal measures a specific student outcome supported by the school's mission and vision statements

Measurable—Each goal has an assessment, report, or measurable metric to provide evidence of its attainment

Attainable—While the goals require the school to stretch and achieve high levels of performance, they are reachable given our program, funding, personnel, and resources

Relevant—The goals are all focused on the school's mission and are focused on specific results

Time-Framed—All goals have a specific timeframe in which they will be met

Additionally, the goals and the authorizer's performance measures ensure that the school will not be held to standards below that of other public schools. The data from across the

country (see Sections 1 and 4) show that the Classically-based, Socratic approach to education, when implemented well, helps students achieve at higher levels. That is the kind of achievement we expect at Classical Innovations.

Using data to demonstrate achievement

Classical Innovations will comply with all state law and board rule as it relates to testing. The school will develop a standardized testing schedule each year, consistent with the state-provided testing window provided to the school. Administrators will attend USOE sponsored assessment director meetings, training teachers on proper test protocol, and overseeing the testing. To implement the standardized exams, the Assessment Department will work in collaboration with teachers to avoid the practice of teaching to the test, which potentially could narrow the curriculum, forcing teachers and students to concentrate on memorization of isolated facts, instead of developing fundamental and higher order abilities.

Students will take all required assessments as required by law each year. As the state's testing requirements change, as they often do, Classical Innovations's board will hold the administration, particularly the Academic Director (see Section 7) accountable to update the school's assessment calendar, train Teaching Mentors in the new assessment protocols and requirements, and ensure that students are assessed as required by law.

In addition to state-mandated assessments that all public schools use each year, Classical Innovations will assess students using curricular and programmatic assessments. These are unique to the school and its specific educational approach and philosophy, so comparison to other public schools won't be a benefit of such assessments. The data from these tests, however, will demonstrate how well the school is achieving its mission and implementing its educational model.

The board will use data from all of these assessments to judge its success and make decisions about priorities for additional measurement and improvement. Each year in March and April, the school will review its current and previous year student achievement data. Those results will help the board define priority areas for focus and to adopt and update academic goals each year that are focused on this charter and the requirements of its authorizer's Performance Standards.

After the board adopts the coming year's goals in the spring, the school administration will craft a plan to implement the programs that will achieve those goals, noting what new resources, if any, will be needed to meet the newly defined priorities. That plan will be presented to the board for information and approval, with the new resources included in the new school year's budget. As the board adopts that new budget in June, the plan will be the official School Improvement Plan that will be used for LAND Trust (subject to approval by a separate LAND Trust committee, if one exists) and the Utah Consolidated Application.

At each board meeting in the next school year, the School Director will present evidence of data relating to the school's prioritized goals. The board will be able to regularly judge

throughout the year if the school is making reasonable progress towards those goals, and if any refinements need to be made to the implementation of the school's program. As the year progresses, more data will be available, and the board will ultimately, in the spring, start the process again, updating the school's goals to continually stretch the school's and its students achievement level. The authorizer will see these results as the school continually improves and excels.

Promotion and Graduation

Classical Innovations serves grades 7-12, so the school will have both a "promotion" and a "graduation" policy. The promotion policy will outline the standards of academic achievement students must meet to move from 7th to 8th, and then from 8th to 9th grades. The graduation policy will outline the amount of credits in total and in subject areas for students to graduate.

Classical Innovations requires that students meet three graduation requirements:

1. Students must complete all academic credit requirements for a minimum of 27 credits.
To accrue credit in any class, the student must achieve a passing grade (D- or better).
2. Students must complete specific classes to graduate (see below).
3. Students must earn 27 citizenship credits. Any citizenship grade of "U" must be made up before graduation.

Students must complete 27 academic credits during grades 9-12

Required Curriculum	Credits
Language Arts	4.0
Math	4.0
Science	4.0
Social Science	4.0
Foreign Language	2.0
Technology	1.0
Fine Arts	1.0
Physical Education	0.5
Fitness for Life	0.5
Health	0.5
Financial Literacy	0.5
Electives	5.0
Total Credits	27.0

Only classes for which students receive a passing grade count for credit. If students have received non passing grade in any class, counselors will assist students in finding make-up credit options. Classes may be taken for credit from accredited sources and recognized at Classical Innovations. Promotion does not really apply at the high school level. High school students earn credit towards graduation, but are placed in classes not by age, but by student ability and choice, in coordination with the school counselors and teachers. Students have four years to reach the above credit requirements for graduation.

Students in grades 7 and 8 will be promoted, accelerated, or retained in accordance with school policy. Promotion means the movement of students from 7th to 8th and from 8th to 9th grade. Promotion shall be authorized upon satisfactory fulfillment of the requirements specified in the charter's academic program and in board policy. Essentially, students who complete required coursework with passing grades will be promoted to the next grade, except in cases where students may be retained or accelerated as allowed under school policy and State Board of Education rules.

Classical Innovations recognizes that special consideration may need to be given to some students for grade placement. Decisions regarding student retention or acceleration will be made only after all the needs and abilities of the student have been assessed and reviewed by a school team and have been determined to meet appropriate criteria.

CI will offer students opportunities for acquiring skills, and for cognitive, academic, social and emotional development. Ideally, individual student needs can be met by differentiated instruction while they remain with their own age peer group. In certain cases, student retention or acceleration may be considered using the following guidelines.

1. Referral: On a case by case basis, a student referral for retention or acceleration will follow the school's special education referral model. Such a referral can be made by a teacher(s), a school administrator or a student's parent(s)/legal guardian(s).
2. Evaluation: When considering retention or acceleration, each student shall be evaluated by a team which is comprised of a school administrator, parent(s)/legal guardian(s), and teacher(s).
3. Criteria: When considering a student for acceleration or retention, the Team shall review the student's maturity, assessment results, social behavior, grades and school performance. Students should be retained or accelerated only if the student's best interests are served in all educational areas.
4. Team Decision: The team is charged with determining whether retention or acceleration criteria have been met according to these administrative guidelines. The team, including parent(s)/legal guardian(s), will meet to share the evaluation results and make a recommendation.
5. The decision of retention or acceleration may be reviewed by the team at any time during the student's educational experience.

In the absence of finding a need to retain or accelerate, students will be promoted to the next grade level upon completion of the school year.

High Standards

Classical Innovations will set a high standard for student learning and ensure that, in its accountability to its authorizer and the public, the school and its students will not be held to

any lower standard than schools or students at schools in any other public school. Authorizer standards include the measure that Classical Innovations perform above the median school in mathematics, language arts, and science as measured on statewide assessments. After the first school year when the school will gather baseline data, the school board will set growth goals to increase student proficiency as measured on these assessments, so not only with Classical Innovations be above the median, but it will continue to climb up the school rankings ladder as the school meets internal growth goals from year to year.

Educationally disadvantaged populations:

- ✓ We do not intend to serve a large proportion of educationally disadvantaged students. *Skip to the next section.*

Section 6: Governance

Corporate Compliance

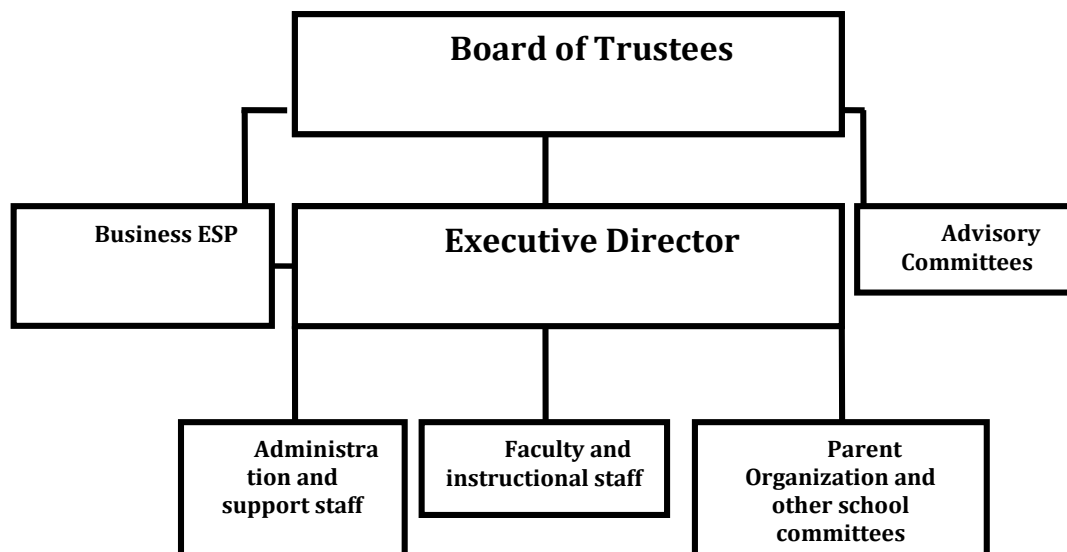
Classical Innovations will be governed by a Board of Trustees, incorporated as a non-profit corporation in Utah and recognized as a 501(c)(3) charitable organization by the IRS. Classical Innovations, Inc. has been incorporated specifically for the purpose of operating the charter school. A copy of the school's filed Articles of Incorporation are included with this application. Section III of those Articles lay out the purposes of the organization, which is to operate the charter school authorized by this application.

The Board of Trustees will govern the school consistent with this application, state law, and bylaws that set out the size, makeup, appointment of members to, and procedures of the board. Copies of these bylaws are included in this section.

The Articles and Bylaws were both adopted in meetings, as shown in the minutes included in this section. Classical Innovations' board will undergo, as required by law, annual training on the open and public meeting requirements of public charter schools and will follow open meetings laws in all its meetings. Classical Innovations believes that its deliberations and decisions should be made in full view of the public, as the public is providing the funding and authority to operate a school. Classical Innovations will post its meeting minutes on the state's public meeting notice website as soon as it is legally authorized to do so. The board will keep record of meetings and both written minutes and audio recordings. It will close meetings only with proper notice and for legally authorized reasons. Classical Innovations' board will continually seek, encourage, and enable broad public involvement in the school's governance with full transparency of its operations.

As required, prior to the submission of this application for consideration of the State Charter School Board, Classical Innovations' board sent this application to the Davis School District for its information, review, and potential comment. A copy of the email sent to the district is included in this section.

Organizational Structure



The above organizational chart demonstrates the reporting relationships between the bodies that make up the school's leadership and operational structure. The school's staff will all report to the Executive Director (in this application, the terms Director and Executive Director refer to the same position), who is the sole employee of the school that reports to the board. The performance of all other employees, from the board's standpoint, is a reflection on the performance of the director.

The board will also directly work with the Business ESP, who will coordinate all aspects of the job with the director but also serve an important function of accountability to the board. (See Section 9.) The director will report on financial matters to the board, and the Business ESP, which has a direct link to the board, will verify the reports' accuracy and act as an independent check on the director's data given to the board. The Business ESP's performance, evaluation, and decisions made on continued engagement will be made by the board.

The board will also establish some board-level advisory committees made up of board members and non-board members, including employees, parents, community members, or other volunteers. These committees are not decision-making bodies, but are data-gathering, researching, reviewing, and advising bodies, who report their findings and recommendations, to the board for action. These committees also make good training and proving ground for potential new board members. The school director will also establish committees that report to the school, serving the same purpose for the management side of the school. Those committees will not report to the board, and any recommendations they may make will be implemented at the discretion of the executive director.

Board Members

The Board is currently made up of the following members, listed below with employment and relevant experience to service on a non-profit charter school board. Please find the included affidavits as part of this application.

Stephen Brink brings a wide variety of experience to Classical Innovations. Stephen earned a BA (cum laude) in Classics from the State University of New York at Buffalo in 2003. He has worked in the private sector in technology, transportation, medicine and retail in management and non-management positions. He has been working in education, as a substitute teacher and classroom teacher since 2005. Although certified to teach Secondary Latin, he has also taught Spanish, French, US Government, Civics, Utah Studies and Learning Strategies. Through his education work in New York, Virginia and Utah, Stephen has experienced a wide variety of educational settings. His varied experience allows him to see education as a parent, classroom teacher, and businessperson.

Elissa Cruz is a freelance writer and editor, wife and mother of five children. From 2002-2009, she homeschooled her children, using the principles of classical education and the Thomas Jefferson Education philosophy. While homeschooling, she was actively involved with the non-profit American Youth Leadership Institute (AYLI), a Utah-based non-profit organization focusing on teaching the principles of leadership to today's youth. She has taught several youth classes and led clubs geared for pre-school-, elementary-, and junior-high-aged homeschoolers, both affiliated with AYLI and on her own. From 2007-2012 she also served in various capacities at the local level and on the district training staff for her local council of the Boy Scouts of America. She has also been a substitute teacher/librarian at Jefferson Academy, the Utah charter school her children attended.

Currently she is actively pursuing a career in writing books for children and teens, and she serves as the Assistant Regional Advisor for the Utah/Southern Idaho region of the Society of Children's Book Writers and Illustrators (SCBWI Utah/S. Idaho). SCBWI is a non-profit, 501(c)3 organization, and the only international professional society for those who write and illustrate for children and teens. In addition, she leads a high-traffic non-profit blog/website whose mission is to celebrate and highlight great children's literature for use at home and in the classroom, and is the founder of #MGlitchat, a popular weekly Twitter chat about books and writing for elementary- and junior-high-aged kids. She speaks across the country at writing conferences, sharing her thoughts about writing for children and teens as well as social networking for writers and illustrators.

Stefanie Cragun is a special education teacher who has worked in special education in several charter schools, and is currently the director of special education for The Academy for Math, Engineering, and Science (AMES). She is also a contractor for the Utah State Office of Education working as UPIPS monitoring team member. Stefanie believes the values and educational philosophy of Classical Innovations can be beneficial for all students, and intends to ensure that students with disabilities are able to participate in all aspects of the school to the maximum extent possible.

Stefanie has a Master of Arts Degree in Mathematics Education, a Master of Science in Special Education, attended the Utah State University Alternate Teacher Preparation Program and has a Bachelor of Science in Sociology with a minor in Political Science. She has served on

the PTA board at the junior high school her children attended as well as on the community council at the elementary school her children attended. Stefanie has served as a volunteer reading and math tutor at local schools. Stefanie did a one year internship at Weber State University where she worked with a lobbyist to attempt to secure federal funding for research projects at the University. Stefanie believes the values and educational philosophy of Classical Innovations can be beneficial for all students, and intends to ensure that students with disabilities are able to participate in all aspects of the school to the maximum extent possible.

Todd Wente graduated from BYU in 1994 with a BS degree in Psychology, having worked as a teaching assistant to Dr. Hal Miller and Dr. Bonner Ritchie during his under graduate schooling. Under the guidance of these two master teachers, Todd learned the importance of authentic assessments of learning, the importance of context centered instruction and the value of selecting curriculum designed to meet the needs of both the student and the community of learning into which the student was engaged.

After graduation, Todd held several jobs eventually leading to his becoming a National Training Manager for an out-sourcing customer service organization. Todd, as part of the management team, oversaw all aspects of the training process for a multi-million dollar client, including budgets, timelines for development and deployment of customized training initiatives and schedules of delivery for classes across multiple states simultaneously.

Todd eventually moved back to the post-secondary environment and became a full time instructor for Stevens Henager College, the Dean of Education, Dean of Students and Instructor Trainer for the Ogden campus and is currently employed as the corporate trainer for the organization. Todd earned his M.Ed. Instruction and Curriculum in 2005 and has been honored as an inductee into Who's Who among American Teachers, Mensa, Pinnacle Honor Society and Phi Beta Kappa. He has also served on the Utah State Board of FBLA-PBL and was honored as the Outstanding Advisor for PBL for both the state of Utah and the Western Region. Todd is committed to education as the ongoing process by which wisdom is earned anew and added to by each succeeding generation of scholars.

Richard Eccles was a founding parent and the Chief Financial Officer and Business Manager at Legacy Preparatory Academy and holds a degree in Business Management from the University of Utah. He was part of the Legacy parent group that expanded the school's program to include a high school. Prior to his ten years in the charter school industry, Richard was a small business consultant and software developer and held board positions with the Central Valley Veterinary Group and the Pet Samaritan Fund of Utah.

A Governing Board

It is anticipated that the members of this board will serve in their present configuration until such time as the school begins startup operations in earnest, at which point, the school will engage an Executive Director. (See Employees section of this application for more details on employment, qualifications, and role.) At that point, the board will seek to increase in number by recruiting to the board a member with significant legal experience or education,

and, when school starts, appoint the leader of the school's Parent Organization to serve as a board member.

At that point, the majority of the work of starting the school will be completed in conjunction with compensated staff, vendors, and volunteer parents of registered students. The board will transition from doing the bulk of required work on its own to *governing* the work of others.

Classical Innovations' board considers *governing* to be an active verb, not just the absence of "management." The Board will govern the school by actively doing the following:

- Set goals that establish clear metrics for what the school is expected to achieve—those in this application and others that the board will set and update annually
- Establish parameters within which the administration has latitude to conduct its implementation of the school's program
- Monitor results of the school's program in line with the board's goals
- Hold the school's leadership accountable for the achievement of the goals and for behavior within school policy

Classical Innovations' board will focus on the big picture of setting goals and establishing parameters that empower the school to achieve those goals within reasonable and legal limitations. It will be the job of the school's administration to determine how those goals will be legally and appropriately accomplished, and the job of the board to determine how well the goals have been achieved.

The board will adopt policies that require the school to comply with all applicable laws, operate with transparency and openness, implement all aspects of this charter application, submit all required reports to its authorizer, and to report to the board on the achievement of board goals with documentary evidence of academic and financial results. Further, the board is aware of its obligations as officers of a public body. The current trustees have been selected and recruited to bring together a cross-section of experience, expertise, and points of view. As the board increases in size and changes focus to a governing board as the school begins operations, the board will ensure that new members have experience that will allow the board to:

- Represent the school's stakeholders well, including parents and the surrounding community;
- Recognize the board's primary obligation to the school's authorizer and Utah's taxpayers;
- Oversee the quality of the educational program and collect assessment and other data that demonstrates the level of academic achievement and growth;
- Oversee the management of public funds, and will require monthly reports with independent evidence to verify appropriate use of funds;

- Oversee and collect reports on the school's legal compliance and requests from its authorizer, using the authorizer's Performance Framework as the basis for judging compliance;
- Ensure that the school operates consistent with this charter in every respect and achieves the academic goals set here and as those goals may be updated from time to time by the board;
- Sustain its governing capacity throughout the startup and then through ongoing operations.

Training

While Classical Innovations' board has a good mix of experience, expertise, and, of course, dedication to the school and its mission, it's also true that this group has never worked together in this capacity before. The board's experience as a board is just beginning, and the responsibilities of a public school board are vast and heavy. The board understands that it needs and will seek ongoing training in how to govern effectively and achieve its goals. Classical Innovations understands that good governance costs less than poor governance. To that end, the board will ensure that its own capacity for quality governance is maintained and increased. The board has two prime methods for achieving, maintaining, and increasing quality governance.

First, all new board members will be required to complete the GBOT training modules provided by the State Charter School Board within their first year on the board. Each time a board member is elected to a subsequent term, that board member will again complete the GBOT training modules over the course of that term. This practice will ensure that board members are up-to-date on changes in charter law and best practices, as well as receiving continuing education in the priorities of the school's authorizer. Second, the board will work with its authorizer's Mentoring Program that provides ongoing board training as part of an overall service package including business services and board development. In addition to participating in system-wide board development activities, the school will also engage either its authorizer's mentoring agency or an independent consultant to analyze and provide specific training to Classical Innovation's board consistent with the goals and standards of this charter application. Initially, this training will be completed, including the development of a strategic plan, over the course of the school's first year, and then on an as-needed basis as the board changes its make-up and as events warrant.

Evaluation and Accountability

The board will adopt a calendar by which it will receive reports from the school administration on the following:

- Copies of all reports sent to the school's authorizer
- Verification that reports required by other state agencies have been submitted
- Reports of progress toward the achievement of board- and charter-defined goals

- Annual survey results from an independent source of the satisfaction of students, parents, and staff (Classical Innovations intends to begin using the Indicators of School Quality [ISQ] survey developed by Utah State University)
- Records of formal complaints submitted to the board according to the Complaints Policy and their outcome
- Financial statements showing actual data in relation to the school's budget as well as annual reports and financial statements from auditors

Reviewing this data will allow the board to effectively evaluate the performance of its school leadership by focusing exclusively on *outcomes as measured by accurate data*. The adopted calendar will ensure that the board receives data and reports on a cycle that coincides with the data's availability and submission to other parties. The board will collect this data and annually make a data-driven judgment about the effectiveness of the school's director. This data will lead to either a performance bonus to the school leadership, a requirement that the director submit a school improvement plan detailing how any shortcomings will be addressed and improved, or a timely change in school leadership.

To evaluate the board's own performance, board members and key staff will complete a Board Meeting Evaluation at the end of each board meeting, which asks questions about the quality of the data the board received and of the board's own behavior. This feedback will guide the board and Charter Solutions (see Training sub section above) in targeting training to areas that currently need improvement. This pace will continue until all board members have completed GBOT training modules and the six-part training program described above. After that time, these meeting evaluations will be completed quarterly.

The board's stewardship will also be measured by its compliance with the Quality Governance component of the State Charter School Board's performance framework. The board will review its performance report from the SCSB annually and target training and reports to improving any areas shown to be below standard. Additionally, the ISQ results will be analyzed for details about board performance, as will the results of any accreditation visit or report.

Even after the school has gained experience from years of operation and the school runs smoothly from day-to-day, Classical Innovations' board understands that new circumstances will arise, new members will rotate onto the board as experienced ones rotate off, laws and expectations will change, and that the board's own and industry experience will continue to refine board expectations and raise the bar for quality performance. Therefore, the board will continually invest in its own governance capacity.

Classical Innovations' board understands that good governance costs less than poor governance. Therefore, an investment in the board's capacity for quality governance will be a priority each year.

Background Information Sheet

Name Todd Wentz

Role with school Board Member

Expertise Curriculum and Instructor development

Statement of Intent:

I am a firm believer of the importance of providing engaging curriculum and instruction at every level of the education process, especially as it relates to preparing young men and women become capable and productive in advanced educational and professional settings. I bring experience working in both educational and not-for-profit entities as both volunteer and paid professional employee in the area of curriculum refinement and instructor preparation.

Not-for-Profit History:

I have served as a member of the State FBLA/PBL Board of Directors which oversees the activities of Utah's State FBLA/PBL activities in keeping with the National FBLA/PBL rules and guidelines. I have also been involved with the American Diabetes Association for the past 13 years as a key volunteer, working on and chairing various committees for fundraising events. Through my involvement with these organizations I have developed a sense of the importance of maintaining proper controls for finances, documentation of actions taken and the critical nature of remaining mission focused.

Employment History:

I have worked as a national program manager for several organizations with full budget responsibility and accountability. My roles as a local advisor and state board member for a national non-profit student organization has helped me understand the importance of maintaining transparent accountability and communication with all the various stakeholders. Financial documentation, including advanced approvals and final accountability, was paramount at all organizational levels, ensuring that monies were used appropriately and wisely. I have also been employed as a trainer of staff including teachers and instructors in a post-secondary institution for nearly 5 years. For 5 years prior to that I was a designated Instructor Trainer for a local campus of the same institution.

Education History:

I have a Master's Degree in Education obtained from Weber State University in 2005. The focus for the degree was instruction and curriculum. I have been a post secondary instructor for a period of 8 years, running from 2001 to 2009. I was a teaching assistant during my undergraduate program at BYU to both Dr. Hal Miller in 1992 and Dr. Bonner Ritchie in 1993.

Background Information Sheet

Provide the following information on each founder, governing body member, and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.*

Name Stefanie Cragun

Role with school Board Member

Expertise Special Education

Statement of Intent:

My role on the board is to assist Classical Innovations to open the school with a special education program that is ready to meet the needs of the students with disabilities on day one. I also participate in planning meetings and document preparation to bring a special education perspective. My intention is to ensure that students with disabilities are able to participate in all aspects of the school to the maximum extent appropriate for that student.

Not-for-Profit History:

I have experience with several charter schools as special education director. This experience includes, provision of services in multiple settings, working with contractors who provide related services, accommodations, special education finance, and compliance with IDEA and State special education regulations.

Employment History:

Ogden School District Special Education teacher 2 years

Hawthorn Academy Special Education Director 1 year

Oquirrh Mountain Charter School/Jefferson Academy Special Education Director 2 years

Legacy Preparatory Academy Special Education Director 2 years

Academy for Math Engineering and Science Special Education Director current

USOE Contractor UPIPS monitoring team current

Education History:

2007 Weber State University BS Sociology (minor Political Science)

2010 Utah State University Alternate Teacher Preparation Special Education.

2012 Western Governor's University Master of Science Special Education.

2013 Western Governor's University Master of Arts Mathematics Education Middle Grades.

Background Information Sheet

Name Stephen Brink

Role with school Founder and Board Chair

Expertise Education

Statement of Intent:

My role on the governing board is that of chairman. It reflects the commitment that I have made to see this application be approved and the school moves forward. From an education perspective, I have been a classroom teacher for roughly 7 years and I am using that experience to inform my decisions as part of the board. I have served on committees and unincorporated boards as part of job duties or as a volunteer. I have also worked in the private sector in management roles and am using that experience as the board chairman.

Not-for-Profit History:

To be blunt, I have only volunteered for non-profit organizations, with no management responsibilities. However, I am a quick learner and with my professional experience in and out of education, I have learned much over the past several months and will learn what I need to know. Also, I have tried to find board members with more experience in these areas to help balance out my inexperience.

Employment History:

2014 – Present: Teacher at Rowland Hall, Salt Lake City. Teaching exercises many skills, but in terms of my work on the board, it strengthens my time management and prioritizing skills.

2010-2012: Teacher at Oquirrh Mountain Charter School, Kaysville. In addition to above, I had opportunities to develop interdisciplinary projects and participate on the curriculum committee.

2002-2003: Manager for ExpressMart, Auburn, NY. I was responsible for the employment and performance for all employees, as well as managing the store inventory, managing and reporting store financial data, and setting and attaining store goals. As part of this, I also needed to be familiar with all laws and regulations regarding food preparation, handling and service, as well as hazardous materials storage.

2001-2002: Manager for The Picture People, Syracuse, NY: With the exception of the food, I had the same responsibilities.

1994-1996: Public Affairs Clerk for the US Army Corps of Engineers, Buffalo, NY. I was responsible for writing press releases for public distribution, as well as in-house news stories for Corps-wide distribution. I also acted as assistant editor for the in-house news magazine. I learned how to write for public consumption and how to get that message published.

Education History:

BA (cum laude), 2003, Classics, State University of New York at Buffalo.

Background Information Sheet

Name Richard R Eccles

Role with school Board Member

Expertise Charter School Finance & Management

Statement of Intent:

For the past 24 years, I have had the opportunity sit on, advise, or train nine for-profit and non-profit boards. I believe there is a great need for a secondary school in Davis County which only Classical Innovations can now provide.

Not-for-Profit History:

I was a founding parent at Legacy Preparatory Academy and held board position with the non-profit Pet Samaritan Fund of Utah.

Employment History:

2006 to 2012 – Business Manager and Chief Financial Officer of Legacy Preparatory Academy.

2013 to Present – Business Manager and Business Development Director for Charter Solutions.

Education History:

Bachelor of Arts in Business Management, University of Utah 1987.

Background Information Sheet

Name Elissa Cruz

Role with school board member

Expertise small business, leadership, office, organizational skills, event planning, past board experience

Statement of Intent:

I am excited to be working with a team of dedicated professionals who believe in the Socratic method of teaching and learning. As a previous homeschooling mother, I used the principles of a classical education with my own children, and I am impressed with the direction this governing board wishes to take with this charter school. I hope to bring my considerable organizational and leadership skills to the table in order to help keep the governing board organized and efficient.

Not-for-Profit History:

Since April 2012, I have been the Assistant Regional Advisor (ARA) for the Utah/Southern Idaho chapter of the Society of Children's Book Writers and Illustrators (SCBWI). SCBWI is an international non-profit, 501(c)3 professional organization for those who write and illustrate for children and teens. As ARA, it is my duty to plan and carry out all writing events for the

hundreds of members throughout the state of Utah (and the hundreds more who attend our events as non-members), and I also lead a team of nearly 20 volunteer writers and illustrators who help organize our events. On average, each year we carry out four large, day-long conferences and over a dozen smaller monthly meetings, and our events require finding nearly twenty qualified speakers or teachers from across the nation as well as handling several venue rentals and catering services. I am also responsible for drawing up a budget (and subsequent financial report) for all events in our state and keeping all bills and invoices paid, since our Regional Advisor and I are the only ones authorized to write checks for our region.

In 2010 I started a non-profit website/blog, www.fromthemixedupfiles.com, where I lead a team of nearly 30 authors. We discuss and highlight books for kids ages 8-12, interview authors and other people of importance within the children's publishing community, and discuss topics related to books for elementary- and junior-high-aged children. We also compile pages of resources of interest to teachers, librarians, parents and authors of books for this age group. Our blog receives between 8,000-10,000 visitors and 40,000-50,000 page views each month.

In 2007 I also served with the non-profit American Youth Leadership Institute (AYLI), a Utah-based organization focusing on teaching the principles of leadership to homeschoolers in the state. I served on the board for a short period as the Volunteer Coordinator for the Knights of Freedom Summit, a summer youth camp for boys ages 8-12 sponsored by AYLI. I was responsible for organizing and leading a team of nearly 100 volunteers who taught and helped during the dozens of sessions the boys attended during the camp. I also started my own AYLI-sponsored Knights of Freedom Club for a group of almost a dozen boys, and served as their Advisor for the weekly group meetings.

Employment History:

From 2012-2013 I was Vice-President of GC Chiropractic Services, a professional corporation owned by my husband for his small chiropractic clinic. My primary job was setting up office procedures and managing patient files and accounts, though I also served in an advisory capacity for all marketing and advertising as well product purchase and placement inside the clinic. In 2013 his company was changed from a Professional Corporation to a Limited Liability Corporation, and though I continue to do the same job as before I no longer hold an officer position within the corporation. (As with many small businesses, my husband and I make most of the decisions for the business aspects of his clinic together.)

I have also been a freelance writer and editor since 2009. My area of expertise is fiction for children and teens, but I have also edited medical articles.

In 2008-2009 I worked as a financial clerk for Safeway grocery chain store in Sammamish, Washington. My job consisted of reconciling all accounts at the end of the day as well as balancing the nearly \$1 million in cash the store kept in the safe.

From 1996-1998 I worked as a secretary and receptionist for the LDS Institute system at first the Salt Lake Community College and then the University of Utah. Much of my job consisted of helping students register for classes, purchase textbooks, and deal with parking passes and any other help they needed, as well as working with teachers to make sure their paperwork was prepared and ready for their students.

From 1994-1997 I worked as an aide in the Curriculum Department at the district offices of Jordan School District. My job was to help with all testing for gifted and talented programs as well as inventory and ship math curriculum to teachers across the state. I also created kits for kindergarten testing for each teacher in the district, and helped keep an accurate and updated inventory of the office supplies used by the Curriculum department. I also ran the copy room.

Education History:

In 2005 I earned an Associate Degree from Front Range Community College in Denver, Colorado.

In 1994 I went to Stringham Real Estate School and passed the Utah Real Estate exam.

In 1994 received a Presidential Leadership Scholarship to attend Salt Lake Community College. While there, I served as the Promotions Chair for Student Government and Student Activities, where I led a team of people to create and distribute all advertising material for college activities. I also served as the Historian for the school's Leadership Council, led prospective students on tours of the campus, and took several required Leadership classes. I was also appointed as the student representative for the college's newly-formed computer and technology board (it was the year the school introduced the internet to the campus).

In 1993-1994, while attending Bingham High School in South Jordan, Utah, as my technical education class I was appointed to take care of all finances for the high school's choir department. I was in charge of keeping track of thousands of dollars among nearly 50 separate student accounts as well as organizing and leading all fundraisers for the year. I also was responsible for all finances for the choir tour and had to keep the choir department's budget updated so that the director could quickly check to see if any expenditures were possible.

Also in high school I served on the Riverton City Youth Council in Riverton, Utah, where I experienced first-hand how an effective governing board should work.

**ARTICLES OF INCORPORATION
OF
Classical Innovations**

We, the undersigned natural persons all being of the age of eighteen years or more, acting as incorporators under the Utah Non-Profit Corporation and Cooperative Association Act, adopt the following Articles of Incorporation for Classical Innovations:

**Article I
NAME**

The name of the corporation is Classical Innovations.

**Article II
DURATION**

The period of duration of Classical Innovations is perpetual.

**Article III
PURPOSE**

- (a) To provide educational services to students in the Davis County area as a public charter school.
- (b) To engage in any and all activities and pursuits, and to support or assist such other organizations, as may be reasonably related to the foregoing, which are substantially similar to the foregoing and which are or may hereafter be authorized by Section 501(c)(3) of the Internal Revenue Code and are consistent with those powers described in the Utah Nonprofit Corporation and Cooperation Association Act, as amended and supplemented.
- (c) To solicit and receive contributions, borrow money, purchase, own and sell real and personal property, to make contracts, and to engage in any activity "in furtherance of, incidental to, or connected with the furtherance of the corporation's goals, namely the creation and operation of a public charter school."
- (i) This organization is organized exclusively for charitable purpose within the meaning of section 501(c)(3) of the Internal Revenue Code.
- (ii) Notwithstanding any other provision of these Articles, the organization shall not carry on any other activities not permitted to be carried on by an organization exempt from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code (or corresponding section of any future federal tax code).
- (iii) Upon the dissolution and winding up of this organization, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to a nonprofit fund, foundation, or corporation organized and operated exclusively for

the purposes specified in section 501(c)(3) of the Internal Revenue Code and which has established its tax-exempt status under that section.

(d) Neither the chartering entity nor the state, including an agency of the state, is liable for the debts or financial obligations of the organization or persons or entities that operate the charter school.

Article IV MEMBERS

The corporation shall not have any members.

Article V BY-LAWS

Provisions for the regulation of the internal affairs of the corporation shall be set forth in the By-Laws.

Article VI DIRECTORS

The number of directors of Classical Innovations, their classifications, if any, their terms of office and the manner of their election or appointment shall be determined according to the By-Laws of Classical Innovations. Each Director shall hold office until such time as the Director resigns, is replaced by the remaining Directors or by election, has reached such term limitations as may be imposed by the By-laws or is removed by the Utah State Charter Schools Board (“USCSB”) with or without cause. Vacancies on the Board of Directors shall be filled by a vote of a majority of the remaining Directors, even if less than a quorum, subject to approval of USCSB as set forth below.

At the election or appointment of any new Director, the Corporation’s Secretary shall send written notice to the Director of USCSB, by certified mail with return receipt requested. The notice shall include the identity of the nominated Director(s) and a request for approval of the appointment of the nominated Director. USCSB will have sixty (60) days to approve or reject the nomination of the Director. If USCSB fails to act within the sixty (60) days, the nomination will be deemed approved. The nominated Director may act as a Director, pending the approval or rejection of USCSB. A Director may be removed by the USCSB at any time with or without cause. Notwithstanding anything in these Articles to the contrary, the provisions of this Article VI that give USCSB rights to approve and/or remove Directors will not be amended or altered, nor will any conflicting provisions be adopted, without the prior written consent of USCSB.

Article VII INCORPORATORS

The names and addresses of the incorporators are:

**Stephen Brink
36 West Park Drive
Kaysville, UT 84037**

**Article VIII
REGISTERED OFFICE AND AGENT**

The address of the corporation's initial registered office shall be:

36 West Park Drive Kaysville, Utah 84037

Such office may be changed at any time by the Board of Trustees without amendment of these Articles of Incorporation.

The corporations initial registered agent at such address shall be:

Stephen Brink

I hereby acknowledge and accept appointment as corporate registered agent.

**Article IX
PRINCIPAL PLACE OF BUSINESS**

The principal place of business of Classical Innovations shall be 36 West Park Drive, Kaysville, Utah 84037

**ARTICLE X
AMENDMENT**

These Articles may be amended from time to time, in whole or in part, by the affirmative vote of two-thirds (2/3) of the Directors; provided that no amendment that diminishes the rights of USCSB shall be adopted without the approval of USCSB. Any such amendments shall be consistent with the corporation's status as a tax exempt organization under Internal Revenue Code Section 501(c)(3).

In Witness Whereof, We, have executed these Articles of Incorporation in duplicate this twenty-sixth day of September, 2014, and say:

That they are all incorporators herein; that they have read the above and foregoing Articles of Incorporation; know the contents thereof and that the same is true to the best of their knowledge and belief, excepting as to matters herein alleged upon information and belief and as to those matters they believe to be true.

Stephen Brink

Bylaws of Classical Innovations

ARTICLE I ORGANIZATION

1. The name of the organization shall be Classical Innovations Academy.
2. The organization shall not have a seal but may design a logo.
3. The organization may at its pleasure by a vote of the Board of Trustees change its name with a 2/3rds vote, pending approval from the authorizer.

ARTICLE II PURPOSES

Classical Innovations Academy, a Charter School, has been formed, and established to provide public education pursuant to Utah Charter School laws.

ARTICLE III GOVERNANCE

Classical Innovations Academy shall be governed by the Board of Trustees. All procedures; rights and duties for the proper operation of the Board of Trustees are outlined by the Board of Trustees. The duties, rights, responsibilities and authority of the Board of Trustees are as found in the charter and as outlined below. All governance of the school will be consistent with applicable state and federal law.

ARTICLE IV BOARD OF TRUSTEES

The Board of Trustees shall govern Classical Innovations Academy. The total number of members shall be at least three and shall not exceed nine. The Board of Trustees shall be made up of the Trustees at the time of the adoption of these Bylaws and other members appointed consistent with these Bylaws. The initial trustees at the time of incorporation shall serve staggered terms, with equal an equal number of members having terms that expire one, two, and three years from the date of incorporation. Trustees who take or are re-appointed after the date of incorporation shall hold office until such time as the member resigns or is removed consistent with these bylaws, or has completed a term of three years.

The Board of Trustees shall have the governance and oversight of the affairs and business of Classical Innovations Academy. Such Board of Trustees shall only act in the name of the organization when it shall be regularly convened after due notice to the public of such meeting. The Board shall decide organizational matters only at properly noticed public meetings of the Board where a quorum of the Board is participating and only by a majority vote of the Board members.

A majority of the members of the Board of Trustees shall constitute a quorum and the meetings of the Board of Trustees shall be held not less than quarterly on a schedule adopted by the Board

of Trustees. The Board of Trustees may make such rules and regulations covering its meetings as it may in its discretion determine necessary.

A member may be removed when sufficient cause exists for such removal and by two-thirds (2/3) vote of the remaining members. The Board of Trustees may entertain charges against any member. At any hearing for removal, the accused member may be represented by counsel. The Board of Trustees shall adopt such rules for this hearing as it may in its discretion consider necessary for the best interests of Classical Innovations Academy.

The Board of Trustees shall select from one of their members a Chair. The Chair shall preside at all meetings and prepare the agenda for each meeting. The Chair will be chosen by the majority vote of the Board of Trustees. She/he shall be one of the officers who may sign the checks or drafts of the organization.

The Board of Trustees may select from one of their members a Vice Chair. The Vice Chair shall, in the event of the absence or inability of the Chair, become acting Chair of Classical Innovations Academy with all the rights, privileges and powers associated with that office.

The Board of Trustees shall select from one of their members a secretary. The Secretary shall keep the minutes and records of the organization. It shall be his or her duty to file any certificate required by any statute, federal or state. She/he shall give and serve all notices to members of Classical Innovations Academy. She/he shall be the official custodian of the records of Classical Innovations Academy. She/he may be one of the officers required to sign the checks and drafts of the organization. She/he shall submit to the Board of Trustees any communications, which shall be addressed to him or her as Secretary of the organization. She/he shall exercise all duties incident to the office of Secretary.

Board of Trustees shall select from one of their members a Treasurer. The Treasurer shall ensure the individuals or organizations that manage and have control and custody of the monies belonging to the organization. She/he shall be one of the officers who shall sign checks or drafts of the organization. She/he shall exercise all duties incident to the office of Treasurer.

The Board of Trustees shall authorize the hiring and fix the compensation of the School Executive Director or Charter Management Organization. The Executive Director or Charter Management Organization shall authorize the hiring and set the compensation of all other employees.

ARTICLE V COMMITTEES

The Board of Trustees may appoint all committees of Classical Innovations Academy. Committees have no authority except those specifically delegated to them in action by the Board.

ARTICLE VI INDEMNIFICATION

Classical Innovations Academy shall indemnify any and all persons who may serve or who have served at any time as members or officers, and their respective heirs, administrators, successors,

and assigns, against any and all expenses, including amounts paid upon judgments, Board of Trustees fees, and amounts paid in settlement (before or after suit is commenced), actually and necessarily incurred by such persons in connection with the defense or settlement of any claim, action, suit, or proceeding in which they, or any of them, are made parties, or a party, or which may be asserted against them or any of them, by reason of being or having been members or officers, except in relation to matters as to which any such member or officer or former member or officer shall be adjudged in any action, suit, or proceeding to be liable for his or her own negligence or misconduct in the performance of his or her duty. Expenses of each person indemnified hereunder incurred in defending a civil, criminal, administrative or investigative action, suit or proceeding (including all appeals), or threat thereof may be paid by Classical Innovations Academy in advance of the final disposition of such action, suit or proceeding as authorized by the Board of Trustees, whether a disinterested quorum exists or not, upon receipt of an undertaking by or on behalf of the Board of Trustees to repay such amount unless it shall ultimately be determined that he or he/she is entitled to be indemnified by Classical Innovations Academy. Such indemnification shall be in addition to any other rights to which those indemnified may be entitled under any law, bylaw, agreement, vote of members, or otherwise.

ARTICLE VII AMENDMENTS

These Bylaws may be altered, amended, repealed or added to by an affirmative vote of not less than two-thirds of the Board of Trustees, pending approval from the authorizer.

In all cases, these Bylaws shall be compliant with Utah and Federal statutes and rules governing Charter Schools. In cases of any current or future conflict, the statute or rule shall govern.

Minutes of the meeting when organizing documents were formally adopted

Board of Directors
Classical Innovations Academy
Regular Meeting Minutes

Date: Wednesday, September 17, 2014
Time: 7:00 pm
Location: GoToMeeting (e-meeting)

I. Call to Order

The meeting was called to order at 7:33 pm.

II. Roll Call

Board Member Attendance:
Stephen Brink, chair
Richard Eccles
Stephanie Cragun
Elissa Cruz

III. Chair's Report

Stephen Brink shared that the charter application is 90% finished, and Endeavor Education is tightening up the application now. In particular, Endeavor Education is focusing on making sure our emphases of the mentoring model and its various parts are clear and concise.

He also shared the timeline of the application and the current ranking system of the application process. Since our application is currently ranked first, there is a very good chance that we will get a high ranking during the next step of the application process.

He also informed the members of the board that our board will incorporate and apply with five board members, but there may be the option to add one or two extra board members at a later date during the application process. Stephen has the names of people who may be interested, but at this time there are no moves to add any additional members.

IV. New Business and Consent for Bylaws

Discussed the bylaws submitted by Stephen Brink. Board members found no issue with the Bylaws.

Motion by Stephen Brink to adopt Bylaws.

Seconded by Richard Eccles.

Vote carried with 4 ayes and 0 nays.

V. New Business and Consent for Articles of Incorporation

Discussed the Articles of Incorporation submitted by Stephen Brink.

Board members found issues with the following:

a. Article 3: mentions that the school is located and will operate in Salt Lake County. Since the school will most likely operate in Davis County, the board wished to verify whether the clause can stand as is or whether it needs to be updated.

b. Article 9: lists Endeavor Education's address as the corporation's place of business. Board members were unclear if this was, indeed, the corporation's current place of business or if the board needed to update the section to another location.

Stephen Brink tabled the motion to adopt the Articles of Incorporation until the two issues could be checked and updated if necessary.

VI. New Business and Consent for Finance Policies

Discussed the Finance Policies submitted by Stephen Brink. Board members found no issue with the Finance Policies.

Motion by Stephen Brink to adopt Finance Policies.

Seconded by Richard Eccles.

Vote carried with 4 ayes and 0 nays.

VII. Other Business

Elissa Cruz asked about plans to officially fill board roles. Stephen Brink suggested that the board post the minutes to the public Facebook page and set up another meeting soon to discuss and vote on filling the roles of the board.

VIII. Adjournment

Stephen motioned to adjourn meeting.
All board members supported motion.
Meeting adjourned at 7:50 pm.

Section 7: Staffing

Staffing to fulfill the school's mission

Classical Innovation will structure the staff of the school with the charter as the guiding star. The school's mission as contained in this charter application will be implemented every day by a staff structured to achieve that mission, trained in the principles of the mission, and carrying out the mission every day.

Staffing the classically-based Socratic model of education

Classical Innovations is a school designed to prepare students to be citizen-leaders who can think critically and speak and act persuasively to defend the twin pillars of justice and liberty. This mission will be implemented using a Socratic, classically-based instructional method. All classes are facilitated by teaching mentors trained to teach through questioning. Teachers are referred to as mentors because they are not just transmitting information but rather helping students come to understanding on their own, thereby serving as a mentor in the learning process. Classical Innovations' faculty may look a lot like any other high schools of similar size, but there will be key differences in how those staff are deployed, compensated, and trained.

The school's **Director** will have key roles in developing and the school's culture in addition to taking on the traditional roles of program management, compliance with state law, reporting, managing faculty, dealing with student discipline, public relations, and other general operations. The Director will ensure that the Academic Director and all staff understand school's mission and vision. Ultimately, the director's job will be to ensure that the school meets the goals outlined in this charter using methods consistent with this charter while complying with state law and building a stable future for continued operation.

The **Academic Director**, working under the School Director's guidance, will be responsible for the school's academic program and success. He or she will train teaching mentors in classically-based instruction, and Socratic teaching methods. The AD will have responsibility to develop the library of open source materials that make up each grade-level's curriculum that teaching mentors will use as the texts for classroom instruction. In addition to these mission-specific needs, the AD will also be responsible to ensure teaching mentors, particularly Early Years' teaching mentors, get the training, development, and guidance they need to continue certification and achieve or maintain Highly Qualified status, maintain CACTUS records for the school, recruit and train quality teaching mentors, report on academic outcomes, serve as Assessment Director and Title I director for the school, as well as other general administrative functions.

The **Teaching Mentors** and faculty will lead in their classrooms by instructing students by asking questions that lead students to discover concepts and increase understanding in the school's classically-based instructional model. Teaching mentors will be recruited who demonstrate the ability to question discover answers. Teaching mentors will be expected to

collaborate across grade levels and discipline, working with other mentors on school-wide projects that involve all aspects of the academic spectrum—Math, Science, Language, Arts, and Social Sciences, receiving a grade in each course for work on large multi-disciplinary projects. Classical Innovations knows that not all teachers, particularly in the first year, will likely come with all the skills that the school seeks—most teachers’ colleges give short shrift to inquiry-based instruction, despite the evidence, research, and demonstrations across the country of the model’s success. Therefore the school has budgeted for professional development to teach all teaching mentors these skills over time, and will prioritize hiring one teaching mentor with significant inquiry-based, classical, and Socratic methodology experience for every four teaching mentors hired. (See “Recruiting strategies” subsection below.) These mentors will receive a stipend to serve as a team-lead, modeling for and counseling other faculty to develop these skills and to provide that experience through guided practice and assistance in developing lesson plans and projects throughout the year.

The school will ensure that teaching mentors will have the skills and experience listed above, or will gain those skills through the professional development offered by the school in their early years of teaching.

Teaching Assistants will work with teaching mentors to develop classically-based lessons and plans. Assistants also help mentors by working with small groups of students on specific assignments, enabling teaching mentors to provide the inquiry-based instruction to smaller groups of students. TAs will also provide instruction with larger groups of students while lead teaching mentors develop inquiry-based assignments and content with smaller groups of students during class time. These assistants are important to the successful implementation of the school’s academic program.

The **Counselor** will work individually with students on crafting academic plans that guide the selection of electives and class placement at the school. Each student will have an individualized plan to guide their career at Classical Innovations, and the Counselor will ensure that each students’ plan is implemented successfully by faculty and assistants that provide instruction to students and that each student is on track to complete their plan prior to graduation.

The **Special Education Teacher** will ensure that the same philosophy and program that guides the school as a whole will be modified as necessary so that students with disabilities can also develop those skills as determined by a student’s Individualized Education Program (IEP). IEPs will be written such that individual needs are addressed based on that students abilities, but that the goal of using 21st Century skills on collaborative, project-based learning is utilized for all students to develop the leadership skills necessary for global success.

The **Media Specialist** will ensure that all students at the school, as well as the faculty, have access to original-source materials, tools, and access to global original resources that enable teachers to access the worldwide library of original sources to develop lesson plans and form the foundation of the school’s curriculum. The Library at Classical Innovations will contain

printed material, certainly, including books for research and pleasure reading. But it will also contain computers with ready access to online sources of original documents accessible to both students and teachers to provide both with the tools needed for successful instruction and academic achievement.

Other support staff, including **secretaries** and **custodians**, will fill a more traditional role of making sure that the school's facility stays in good repair and maintains standards of cleanliness that support the program, and that the teachers are supported in their administrative needs.

The role of **Business Administration** will be filled by an Educational Service Provider, with full details in Section 9 of this application.

Specific responsibilities for each role

Each employee in any position at the school is expected to support the school's culture of citizen leadership to achieve the school's mission. The focus and importance of each role in relation to the mission is explained above. This section will list each position along with a list of tasks and day-to-day responsibilities, similar to what you would find in a job description. That said, it is important to understand that the school's approach to accountability is not to judge performance by the checking of boxes in a job description, but by the achievement of outcomes. For school leadership and administration, success will be based on the achievement of school-wide goals as developed by the board based on the school's charter. For teaching mentors, the academic and individualized plan success of their students will be the indicator of success. For support staff, their contribution to the school's culture and overall school performance. For details of these accountability plans, see "Accountability and Incentives" in the "Staffing Plan" subsection below.

School Director

The most important role at the school. The "Job Description" of the Director will be as follows: "The Director is responsible to ensure that the school achieves its goals as contained in the school's charter and that the board may adopt from time to time; that the methods used to achieve those goals is consistent with the methodology, philosophy, and content of the charter; that the school complies with laws, rules, and regulations, and reports such compliance as required to its Authorizer and state authorities; and that the school is fiscally sound and strong."

The director has not yet been identified. The board will seek and hire a director candidate with experience in Socratic Method instruction and who demonstrated the citizen leadership skills that he or she will be responsible to instill in Classical Innovations' students. Classical Innovations is not looking for an *administrator*, but for a *leader* who will inspire faculty and families to embrace the vision contained in this charter and build a culture that leads to the embrace of challenge and academic excellence.

The day to day tasks and responsibilities of the Director will include:

Educational and Program Management

- Demonstrate commitment to the Philosophy , Mission, Vision, and Values of the school
- Possess an entrepreneurial spirit that embraces creativity and dedication
- Possess the ability to learn new things quickly and adapt to changing situations
- Possess skills in school operations and an understanding of state standards
- Possess knowledge of the school's academic programs and methodologies and have a thorough understanding of the Utah State Core Curriculum
- Possess student behavior management skills that focus on positive, effective discipline
- Evaluate instructional program effectiveness
- Develop and enforce policies and procedures
- Manage fiscal budgets, physical resources and personnel
- Devise, implement and evaluate instructional development programs
- Perform hiring, supervision, evaluations and terminations of instructional staff
- Implement effective educational process through the collection and interpretation of student data
- Coordinate with other administration to ensure the school instructional programs further the school's mission
- Work with other administration (including members of the Board of Trustees) on the development, purchase, distribution, and evaluation of curriculum materials
- Work with other administration (including members of the Board of Trustees) to develop required plans for state and federally funded programs
- Work with other administration and the Business Administrator to coordinate state and federal reports of fiscal data
- Collaborate with board committees and other school administrators on planning, operation, supervision and evaluation of the program's and student success
- Collaborate with staff for united school improvement plan.
- Document operations of charter programs to develop accurate budgets, procurement and spending
- Work with Business Administrator to maintain fiscal control; Report accurate fiscal information
- Ensure school facilities are managed effectively. Oversee facilities to ensure maintenance provides a clean and safe school
- Collaborate with staff to implement a student discipline plan that encourages a positive learning environment and enhances student's behavior
- Provide for uniform enforcement of school standards and oversee appropriate and reasonable student discipline as issued in accordance with school policy
- Hold and attend parent/teacher/student conferences in regards to student and school issues
- Ensure necessary and reasonable measures are taken to protect students, staff, equipment, materials, and facilities

Staff Management, Training and Motivation

- Provide training, tools, and all necessary information for each staff member to successfully perform their job functions

- Instruct staff about performance requirements in relation to instructional strategies, classroom management, and communication with the public
- Observe all classes regularly, both formally and informally
- Hold employee evaluation conferences based on records of performance observations
- Ensure collaboration, partnerships and team building among staff, including decision-making and problem solving
- Oversee and assess the performance of all school employees
- Manage conflicts and relations between school employees justly and efficiently
- Evaluate the effectiveness of outside service providers
- Oversee employee screening measures to ensure that each employee has undergone an appropriate background check
- Instruct staff of performance requirements in relation to instructional strategies, classroom management, and communication with the public
- Ensure effective, research-based professional development is provided and implemented
- Attend and present training and information, as requested, during scheduled staff and committee meetings

Fiscal and Legal Compliance

- Abide by all state and federal laws that apply to charter schools and charter policy
- Ensure that there is proper documentation on operations of charter programs to develop accurate budget
- Ensure compliance of budget guidelines. Work with Business Administrator to maintain fiscal control. Report accurate fiscal information
- Ensure smooth operation of school facilities, school finance and risk management, including appropriate procurement of insurance policies
- Ensure school-wide compliance with all policies and procedures. Abide by all state and federal law that apply to charter schools, charter policy and Board policy
- Attend all required Board and state meetings, including the monthly Charter Directors' meeting
- Attend other meetings and training that provide legal guidance
- Participate in the school's annual fiscal audit and oversee the preparation of the school's Annual Budget, Annual Financial and Annual Program Reports
- Ensure school safety by performing fire drills and other drills.

Special Education

- Coordinate with the Special Education Director on student Individual Education Plans to ensure all modifications are met
- Ensure that Special Education Director attends regular LEA meetings provided by the State and follow up on content of trainings
- Keep abreast of changing laws and regulation that apply to Special Education
- Ensure General Education teaching mentors are trained on Special Education needs of students and the school's vision of inclusion
- Ensure annual and periodic special education data uploads and reporting meets appropriate state and federal requirements

Public Relations and Communications

- Establish rapport with parents, students, school staff, and board members
- Create and maintain a professional relationship with colleagues, students, parents, and community
- Coordinate with the school's parent organization to increase parental involvement and activity within the school
- Communicate and assist in teacher communication with parents regarding student progress
- Maintain communication with parents, staff, and other educational professionals to circulate professional research, ideas and information
- Convey the charter's mission to students, parents, staff, and the overall community and encourage support in accomplishing the mission
- Illustrate understanding of charter and community needs and begin activities to meet those needs
- Build positive relations with state education departments and other charter school operators

Professionalism

- Uphold and enforce board policy, administrative procedures, and school rules and regulations, and be supportive of such in your communications with students, parents, and the public at large
- Maintain appropriate work habits, including regular and punctual attendance and appropriate use of conference and planning time
- Communicate the positive aspects of Charter to the public in word and deed
- Work cooperatively with parents and teaching mentors to strengthen the educational program for children
- Establish and maintain cooperative relationships with other staff members
- Assist with overall school operations as necessary or assigned by the Board
- Attend and participate in all professional development days and activities

Academic Director

The Academic Director, not yet identified, is responsible to the School Director for the quality of instruction, curriculum, and student academic achievement. In addition to the broad responsibilities described above, the day to day tasks of the AD will include:

Educational and Program Management

- Supervise instructional and curriculum staff and services to address student achievement
- Devise, implement and evaluate instructional development programs
- Supervise teaching mentors and aides, regularly observe classes and groups, and coordinate the development of training programs in methods, content, and structure
- Assist in hiring, supervision, evaluations and terminations of instructional staff
- Implement effective educational process through the collection and interpretation of student data

- Coordinate with the school director and other administration to ensure the school instructional programs further the school's mission
- Work with the School Director and Business Administrator to coordinate state and federal reports of fiscal data
- Manage the instructional professional development program

Classroom Management and Organization

- Under the direction of the school director, manage student behavior and discipline
- Train teaching mentors in methods of classical education to enhance instruction as prescribed by charter's curriculum and methods
- Train teaching mentors and instructors on how to manage student behavior in agreement with the school's code of conduct and related policies and programs
- Ensure necessary and reasonable measures are taken to protect students, equipment, materials, and facilities
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.
- Undergo training in managing the behavior of students according to Individual Education Plan requirements.
- Assist students with disabilities to encourage their access to full participation in the school's regular programs

Communication

- Establish rapport with parents, students, school staff, and board members
- Create and maintain a professional relationship with colleagues, students, parents, and community
- Communicate and assist in teacher communication with parents regarding student progress
- Maintain communication with parents, staff, and other educational professionals to circulate professional research, ideas and information

Evaluation and Reporting

- Provide/receive student performance measurements to/from teaching mentors who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as requested to discuss needs and progress of students.
- Use effective oral and written communication.
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Teaching Mentors

In addition to the mission-specific responsibilities described above, the day to day tasks of teaching mentors will include:

- Plan and implement a program of instruction that, while demonstrating a strong grasp of the subject matter, adheres to Charter philosophy, goals and objectives as outlined in the academic program and the Utah State Core.
- Keep an accurate, up-to-date record of student performance and progress throughout the year, and meet with parents and communicate with others as needed, assigned, or requested.
- Accommodate students with IEPs as required and recognize learning problems making referrals as appropriate.
- Develop curriculum and lessons using original sources as the basis for instruction and assignments
- Oversee and assess teaching assistants, support personnel and other staff working under the direction of the teaching mentor, including 3rd party entities and volunteers.
- Empower teaching assistants to teach in the Socratic model and to work with small groups of students during Mentor instructional time
- Maintain confidentiality in all aspects of the job. Ensure that student, staff and family privacy is maintained by withholding any and all personal information on any person(s) from unauthorized recipients.
- Contribute to a positive work and school environment by maintaining a positive, pleasant demeanor in all situations and communications.
- Attend staff development activities and seminars to enrich job skills and abilities as assigned by administration and attend all required meetings and events as communicated by supervisors and as outlined in company policies and manuals.
- Develop, in accordance with Charter guidelines and policy, reasonable rules of classroom behavior and appropriate techniques.
- Consistently apply classroom and school behavior management plans.
- Take necessary and reasonable precautions to protect students, equipment, materials and facilities.
- Ensure school safety by assisting with fire drills and other emergency response drills.
- Keep educators' license and endorsements up-to-date and applicable to assignments.
- Participate in professional development programs
- Keep licensure current and demonstrate growth toward higher levels of certification and Highly Qualified Teacher status

Teaching Assistant

In addition to the mission-specific responsibilities described above, the day to day tasks of teaching assistants will include:

Classroom Management

- Under the direction of the special education teacher or director, school director and teaching mentors, assist with the management of student behavior and discipline, primarily for students with disabilities.

- Use classroom management plan consistent with teacher's techniques, school-wide standards and Least Restrictive Behavioral Environment
- Assist with student discipline including removal of disruptive students from class and escorting students to office.
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.
- Undergo training in managing the behavior of students according to Individual Education Program requirements.
- Assist students with disabilities to encourage their access to full participation in the school's regular programs

Classroom Instruction

- Act as a classroom substitute when necessary or when the teaching mentor is unavailable
- Assist teaching mentors with classroom instruction as assigned, including providing individualized instruction, working with small groups, teaching sections of lessons, and all other assignments consistent with school standards and teaching mentor plans.
- Work with teaching mentor to accommodate students with IEPs as required
- Recognize learning and behavior problems and communicate student needs to general and special education teaching mentors as appropriate.
- Demonstrate a strong grasp of subject matter.

Evaluation and Reporting

- Provide student performance measurements to classroom teaching mentor who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as requested to discuss needs and progress of students.
- Use effective oral and written communication.
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Special Education Teacher/Director

In addition to the mission-specific description above, the Special Education Teacher or Director's day to day tasks will include:

Supervisory Responsibilities

- Oversee and assess teaching mentors, instructors, assistants, support personnel and other staff working with special education students
- Directly supervise special education faculty and staff
- Evaluate the effectiveness of special education staff and outside service providers

Program Management and Compliance

- Assist in the creation and outfitting of facilities for students with disabilities
- Continually supervise curriculum program to ensure it is pertinent to student's needs
- Administer guidance in composing and implementing outside service contracts for special education students
- Direct the fiscal aspects of the special education department with the Business Manager and confirm that programs are cost effective and funds are managed within budgets
- Perform all state and federal special education reporting at year end and periodically and as required during the school year
- Coordinate and lead the school's state and federal audits of special education reporting and data
- Enter special education data accurately into the school's Student Information System to ensure accuracy in reporting and appropriate and adequate funding is received
- Ensure that adequate supplies and equipment are available
- Evaluate special education program quality through assessment findings, including student achievement data
- Stay abreast of and abide by state and charter regulations and policies for charter schools
- Advise on policy and program improvements
- Confirm that policies established by federal and state law, and the charter policy in area of Special education are being met
- Gather, manage and file all hardcopy and computerized reports, records, and other documents required by charter, state and federal regulations

Evaluation and Reporting

- Provide student performance measurements to teaching mentor who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as requested to discuss needs and progress of students.
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Classroom Management

- Under the direction of the school director manage student behavior and discipline, primarily for students with disabilities.
- Use classroom management plan consistent with students' IEPs, school-wide standards and Least Restrictive Behavioral Environment
- Assist with student discipline including removal of disruptive students from class and escorting students to office.
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.
- Undergo training in managing the behavior of students according to Individual Education Program requirements.
- Assist students with disabilities to encourage their access to full participation in the school's regular programs

Classroom Instruction

- Assist teachers with classroom instruction as assigned, including providing individualized instruction, working with small groups, teaching sections of lessons, and all other assignments consistent with school standards
- Work with teaching mentors to accommodate students with IEPs as required
- Recognize learning and behavior problems and communicate student needs to staff as appropriate.
- Provide instruction as assigned according to students' IEPs, including providing individualized instruction, working with small groups, teaching sections of lessons, and all other assignments consistent with school standards
- Integrate the Socratic Method and Classically-based instructional practices into Individualized Education Programs as appropriate and ensure that IEP students receive instruction consistent with their individualized programs and the school's charter
- Train school staff in appropriate methods and strategies for helping students with disabilities to have access to and participate fully where possible in regular school programs

Special Education Student Management

- Oversee and maintain special education programs and services to meet students' needs
- Ensure that student progress is reviewed on an ongoing basis and that the results are used to make adjustments to Individual Education Plans
- Ensure special education referral process requirements are met. Arrange for, or conduct evaluations, advise on placement and program management for each student
- Collaborate with school administration and other service providers (Counselor, Speech Therapist, etc.) and teachers on student Individual Education Plans to ensure all modifications are met
- Collaborate with parents, students, and teachers through conferencing on vital issues
- Ensure necessary and reasonable measures are taken to protect students, equipment, materials, and facilities

Media Specialist

In addition to the mission-specific support described above, Media Specialists' day to day duties will include:

Classroom Management

- Oversees student discipline and assists teaching mentors with student behavior while students are in the library.
- Use classroom management plans consistent with teacher's techniques and school-wide standards.
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.

Media Center Administration

- Plans, implements and evaluates the media center's program, policies, and services that support the school's mission and instructional objectives.
- Requests and administers the media center budget.
- Seeks out original source volumes and materials as the basis of the library's inventory
- Prepares for the opening of the media center so that services are available from the first day of school until the last day of school.
- Serves on appropriate school committees.
- Recommends for selection, trains, and may supervise other media center staff.
- Assists in planning for adequate media center equipment and supplies.
- Maintains the media center so that it is attractive and efficient to use.
- Writes reports relating to the media center as necessary or required.
- Prepares requests for funds relating to the media center from federal and other resources.
- Coordinates public relations highlighting the media center program and services.
- Designs a schedule that ensures timely access to media center resources for all students and staff, as well as time for library management activities.

Instructional Support

- Collaborates with teachers in implementing integrated instructional activities, applying current instructional strategies.
- Prepares bibliographies and lists of resources.
- Coordinates with teaching mentors on the original source content available in the media center
- Coordinates a variety of services, including class visits, individual and small group projects.
- Serves as information specialist to assist teachers and students in selection and use of instructional and project materials.
- Conducts staff orientation to the media center's services and programs and original source volumes and online services.
- Provides library/technology in-services training activities for staff.
- Coordinates selection of materials for library collections and special units of study.

Resource Management

- Develops, updates and publicizes the school library materials selection policy.
- Reviews professional journals, bibliographies, selection aids, publishers' catalogs and brochures and routes these to staff as appropriate.
- Confers with sales representatives and communicates to staff and administration as appropriate.
- Consults with staff and students in evaluating, selecting and acquiring library resources, with emphasis on original source material, and equipment.
- Provides a variety of print and media/technology related resources.

- Classifies, catalogs, and organizes the media center's materials for maximum accessibility and availability.
- Procures and maintains an inventory of the media center's materials and equipment.
- Maintains a system for circulating and retrieving the media center's resources.

Counselor

In addition to the mission-specific support described above, Counselors' day to day duties will include:

Counseling Plan Development and Management

- Uses data to discuss, develop and continually improve the school's comprehensive school counseling program and work with school leaders and suggests and implement improvements to the program
- Communicates the goals and objectives of the school counseling program to administrators, teachers, students, parents, and the Governing Board (as requested)
- Manage the school's referral process as a part of the schools comprehensive school counseling program
- With teachers and administrators, develop individualized program plans for each student
- Ensure the comprehensive school counseling program's compliance with applicable standards, laws, rules, and ethical standards of the school counseling profession
- Stay abreast of and abide by state and charter regulations and policies for charter schools
- Advise on policy and program improvements
- Ensure that policies established by federal and state law, and the charter policy in area of school counseling are being met
- Gather, manage and file all hardcopy and computerized reports, records, and other documents required by charter, state and federal regulations
- Conduct an annual audit of the comprehensive school counseling program to ensure effectiveness

School Counseling Program Delivery

- Provides leadership and collaborates with other educators in the school-community regarding school counseling needs
- Implements appropriate, prevention-oriented activities to meet student needs and the goals of the program
- Provide individual and group counseling to students with identified concerns and needs
- Uses assessment tools and techniques for determining and structuring individual student and group counseling techniques and services, including their effectiveness
- Works with parents/guardians to assist student to implement life skills that students need to be successful, including education, career and life planning needs, according to the school's charter
- Assists students individually or in small groups with the development of academic, career and personal/social skills, goals, and plans

- Ensure that student progress is reviewed on an ongoing basis and that the results are used to make adjustments to plans if applicable
- Collaborate with school administration and other service providers (Special Education staff, Speech Therapist, etc.) and teachers on student counseling plans to ensure all modifications are met
- Collaborate with parents, students, and teachers through conferencing on vital issues
- Communicates effectively with parents/legal guardians, teachers and administrators regarding students' concerns and needs and helps them to interpret and understand assessment and other data

Evaluation and Reporting

- Provide student performance measurements to teaching mentor who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as needed to discuss needs and progress of students.
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Secretaries and Receptionists

In addition to the mission-specific support described above, secretaries' and receptionists' day to day duties will include:

Registration, Records, Data and Correspondence

- Prepare data for school, state, and federal reports
- Organize and manage hardcopy and electronic school and student files
- Act as school registrar for student information and records
- Receive, sort and deliver mail and other documents to staff
- Record and track parent volunteer hours
- Draft correspondence, forms, reports, etc. as requested by the School Director and other administrative staff
- Oversee school calendar, scheduling, and appointments for administrative staff and the school facility
- Maintain personnel time records including leave requests, substitutes, and payroll reporting
- Attend meetings with school director and take meeting minutes
- Training all users on the school's chosen Student Information System (SIS)
- Disperse and manage paperwork for newly enrolled students
- Assist, manage and access information for various school and government required reports
- Complete regular updates of the student information system
- Assist Administration and teachers in accessing information and running necessary reports
- Run Year-end and/or rollover processes and School Finance & Statistics Data Uploads and set-up up new year programming
- Preparing and coordinating class schedules, maintaining enrollment processes and coordinating class schedule changes

- Record and track attendance as required for school and state reports
- Maintain school and student files, both electronic and hard copies
- Maintain and ensure the confidentiality of records and information regarding students, parents, and staff in accordance with accepted professional ethics, state and federal laws

Accounting

- Attend to routine bookkeeping duties
- Maintain personnel time records including leave requests, substitutes, and payroll reporting
- Order, receive, and inventory school supplies and materials
- Receive donations and cash for purchases, following proper internal controls to account for funds consistent with school policy

Customer Service

- Answer incoming calls, take accurate messages, and transfer to appropriate staff
- Coordinate substitutes with School Administration
- Assist with the daily arrival and departure of students
- Greet and assist students, parents and the general public
- Assist with school events, including parent/teacher conferences as requested
- Work with the Parent Organization
- Coordinate information with school newspaper

All Employees

In addition to the mission- and school culture-specific support described above, all employees will also demonstrate that they can:

- Handle multiple tasks.
- At times handle and maintain control in high-stress situations.
- Maintain confidentiality in all aspects of the job. Ensure that student, staff and family privacy is maintained by withholding any and all personal information on any person(s) from unauthorized recipients.
- Contribute to a positive work and school environment by maintaining a positive, pleasant demeanor in all situations.
- Provide positive reinforcement to students, staff and visitors.
- Communicate effectively and politely with co-workers, students, volunteers, parents and visitors to the school and foster and maintain cooperative relationships.
- Ensure school safety by assisting with fire drills and other drills.
- Attend staff development activities and seminars to enrich job skills and abilities as assigned by administration.
- Attendance required meetings and events, including meetings or events at irregular hours or on extended days, including meeting the reasonable expectations of school Administration.
- Coordinate schedules and meetings. Attend meetings as appropriate or as assigned.
- Adhere to school and administrative policies as instructed and/or outlined in school policy manuals, handbooks or other corporate materials.

- Organize and maintain files and records.
- Perform other duties which may develop or as requested.

Filling the school with quality faculty and leadership

Executing the above structure will take a robust plan to ensure that the right people are recruited, identified, and hired. It is important that faculty and staff in all positions have the proper experience, licenses, and backgrounds. Once qualified people are hired, they must be deployed consistent with the school's mission to ensure sound operation and successful implementation of Classical Innovations' unique educational program.

Legal requirements for faculty and staff

School policy will ensure that:

- All faculty and staff will meet legal requirements for licensure for their position, or are making progress through a legally approved alternative route.
- For education faculty that come from non-education industries, the Director and Academic Director will oversee each employee's enrollment in an approved license-alternative program, and monitor progress through each program. Employees that do not make needed progress toward ultimate licensure or other legal alternative will not be retained in faculty positions.
- The school shall not employ any individual whose license to teach has been suspended or revoked by the Utah State Office of Education.
- Employees who have significant unsupervised access to students will undergo a background check, as required by law, as well as additional background checks on hired employees that are in any position of trust, whether or not they have unsupervised access to students.
- Administration shall conduct reference checks for all hired employees, including character and employment references.

Recruitment

The school's first priority will be to recruit and hire a quality school leader to serve as the Director of Classical Innovations. The best candidate will be chosen after a nationwide search for the leader with the right balance of classical education training, leadership qualities, and school administrative experience. The board will use the following process to recruit the Director:

- Post the job opening at national educator recruitment sites, like teachers-teachers.com and at Classical and Jeffersonian Education sites, like the Association of Classical Education Schools.
- Recruit directly from universities with known and reputable classical education teaching programs, like Greenleaf University, Hillsdale College, University of Virginia, and Biola University.

- Establish a board committee to sort through CVs, ranking candidates based on a three-part rubric measuring classical education training, leadership qualities, and school administrative experience.
- Conduct Skype interviews with the top six to ten candidates, again ranking them in the three key areas of focus, adding a fourth element of interview quality and personal interaction.
- Assign each of these candidates a project to complete demonstrating their ability to create curriculum, implement Socratic Methodology, and lead others in implementing a common vision.
- Bring in the top two to three candidates for in-person interviews with the entire board.
- The board will vote based on this final interview and the completed project.
- When selected, the board will hand off the day-to-day management of the school to the director and begin the transition to a governing board (see Section 6).

Once the School Director has been identified, the school's recruiting efforts can concentrate on recruiting teachers and support staff, rather than executive staff. The school will employ the following strategies to recruit teaching mentors:

- Post job openings at teachers-teachers.com, where the State has a free account it makes available for public charter schools. Classical Innovations' research has shown that this resource is a primary source that most Utah charter schools, providing the most realistic and effective strategy to recruit large quantities of teachers, which Classical Innovations will need in its first year.
- Classical Innovations' director will undergo training on effective employment advertising, using strategies that highlight the school's unique aspects and that turns an employment "listing" into an advertisement for the school that is more likely to increase teacher interest and response.
- Classical Innovations will attend teacher hiring fairs, including the annual Charter School teacher fair, and potentially teacher fairs at one or more universities.
- Classical Innovations' founders will also recruit teachers from among their personal network of friends and associates, which is wide, given the charter school, university, and general educational background and experience of the school's founders.
- Post on the job boards of colleges and universities with Classical Education programs.
- On an ongoing basis, Classical Innovations will provide incentives to current employees for recruiting individuals that would be successful in the school's program that are ultimately hired by the school.

These strategies will combine to bring hundreds of applicants to the school for its limited job openings in the first year. The more important role of the school is in properly identifying the experience, skills, and philosophy match held by each candidate and their compatibility with Classical Innovations' needs and philosophy. Classical Innovations' process will ensure that such candidates are identifiable in the recruitment process so that the school is more likely to hire well-matched candidates in the first round.

Candidates who apply will be asked to write a short essay on their educational philosophy. Classical Innovations will have a committee of board members that will sort through applications and resumes, looking for experience in classically-based education and original source reading and instruction. The committee will interview selected candidates using a pre-defined set of questions and a scoring and make final decisions based on committee evaluations according to the established rubric.

Candidates from non-education industries will undergo additional scrutiny by the committee to ensure that their experience is relevant and that they possess skills that will translate in a secondary education setting. There will be an additional section of questions and the rubric that gauge candidates' suitability for working with children and adolescents in an educational setting. These candidates will also perform a "teaching interview," where they will teach a real-world concept in a project-based method to a group of students while the hiring committee observes. All such candidates that are hired from this group will be enrolled and move through an approved alternative route to licensure.

Classical Innovations believes that this process will lead to selection of high-quality and philosophically matched teaching mentors in the first year. However, charter school experience, data analysis, and common sense dictate that not all first-year hiring decisions will lead to long-term employment. The school will therefore follow the same process of recruitment, though on a smaller scale, in future years, while at the same time building a school culture that leads to high employee satisfaction and retention.

There are four key factors that will help Classical Innovations retain its best teaching mentors. School leaders will create a quality work environment by providing leadership, motivating employees to succeed, and helping teaching mentors improve in their job, and allowing opportunities for growth. The school will employ these four strategies as follows:

- Promote top-performing teaching mentors to higher-level positions such as mentors, curriculum developers, assistant administrators, and program directors. These positions will come with additional responsibility that can help teachers fill out their resumes with important experience, fill out their professional career with skills and training, and fill up their bank accounts with additional money.
- Provide incentives that reward high-performing teaching mentors, including recognition, praise, awards, and bonuses. The administration will create employee recognition and reward programs, as well as a performance compensation plan that will be based on student achievement, classroom observations, professional development and behavior, and the results of student and parent surveys. (See Accountability and Incentives subsection below).
- The director will demonstrate through his administration of the school high-quality leadership principles that are part of the school's academic and philosophical foundation. Research consistently shows that one of the strongest incentives for teachers to remain in any school is the quality of the principal. Classical Innovations' board recognizes this, therefore the board will empower the Director to be the kind of principal that teachers want to work for. Further, as the school provides incentives to

teaching mentors for high performance, part of the Director's evaluation, accountability plan and financial incentives will be based on teacher evaluation of the Director, their job satisfaction, and the school's climate.

- Continually develop teaching mentors through ongoing professional development, working with the school's international partners, the school's own administration and faculty leaders, local charter schools with similar goals, and other sources.

The retention rate of teachers will be a key metric in the board's annual evaluation of the school director's performance. The time and treasure invested in bringing quality teachers to the school will only be of value if those teachers grow and develop with Classical Innovations over the long-term.

Performance standards

Classical Innovations recognizes that quality teaching should be matched with quality compensation, and that providing incentive for higher performance will lead to greater student achievement and school success. Classical Innovations will put in place performance-based compensation that rewards teaching mentors for outcomes consistent with the school's goals and mission.

- Criteria: High Performance Teaching includes these four elements:
- Impact on student learning gains
- Excellent teaching practice
- Professionalism and leadership
- Parent Satisfaction

High Performing teaching mentor's students make more than one year's worth of growth while in their class. Teacher impact shall be measured using a value-added model of student test scores. A teaching mentor's impact will be measured by the progress of his or her specific students over the course of the year that they were in the teaching mentor's class.

Quality classroom instruction and management will be measured by qualified observers during in-classroom observations by administration and/or education consultants using standards outlined in the school's charter, developed by school administration, consistent with Board policy and approved evaluation standards, and fully explained to teaching mentors.

High Performing teaching mentors contribute to the school community at large and serve as professional role models to fellow teaching mentors and students alike. A teaching mentor's professionalism, leadership, and quality are evaluated by the school administrative leadership team.

High Performing teaching mentors achieve high levels of satisfaction among their students and parents. Once annually during the final academic term, Classical Innovations will survey parents on overall school operation, including satisfaction with teaching mentors and administration.

The board will adopt a Performance Pay policy consistent with the basic description here. School leadership will also be evaluated based on outcomes, using a similar, but differently targeted, four-element structure:

- Enrollment
- Teacher Retention
- Student Achievement and Learning Gains according to the goals in the charter
- Parent Satisfaction

Teaching mentors and administrators who are rated high according to the rubric will be rewarded with raises, bonuses, promotions, and other monetary and non-monetary incentives. Those who score low will be coached and counseled with improvement plans, specific timeframes for the noted improvement, which will either lead to the individuals' performance meeting standard, or the termination of employee's employment.

Staff structure and organization

Faculty will be deployed throughout the school to ensure that students, including students who are academically at-risk or have disabilities, receive the instruction, support, and resources they need to succeed according to their individualized plans. This deployment is explained in detail in Section 8 and is consistent with and supported by the school's budget as submitted with this application.

At first-year full enrollment, the school will hire 21.75 full-time equivalent teachers, including a special education teacher, which puts the teacher to pupil ratio throughout the school at 20:1. These teaching mentors are supported by an administrative team of the School Director and Academic Director who will administer all educational and student programs, including student discipline, teacher development, international and local partnerships, and charter fidelity. The administrative team also includes two FTE school receptionists/secretaries, who, as school secretaries always do, keep all the trains running on time.

Teaching mentors are further supported by highly qualified teaching assistants, who will assist teaching mentors in providing enhanced services to special populations of students, including those with disabilities or those who are at-risk of academic failure. These assistants will provide additional instruction, pull-out groups, and work with students as needed on their projects or on any academic or other issue required by an Individualized Education Program.

The faculty and students in school will be supported by a school counselor and media specialist. These positions are important because they are required by law and accrediting agencies, and they also provide students with the guidance they will require to be successful in the project-based, media- and technology-rich environment that Classical Innovations will create for students.

For full details of how this staffing deployment plan, including the support of professional development, and performance-based bonuses, see the Key Budget Assumptions subsection of Section 8 of this application.

At-Will employment

Classical Innovations is an at-will employer. The school will not sign contracts for any length of time for any employee, with the potential exception of the school's executive director. All HR policies, forms, manuals, and procedures will protect the school's at-will employment status. Nothing in this charter application, including any description of possible procedures relating to any HR transaction shall be construed to limit the at-will nature of employment at Classical Innovations.

The school desires to have positive, collaborative, and mutually beneficial relationships with all employees. At-will employment furthers these goals by leaving both the school and each employee completely free to constantly evaluate the benefits to themselves of continuing the employer-employee relationship. As noted, Classical Innovations will have in place practices that lead to a positive workplace culture that the board believes will lead to high retention of quality employees.

Section 8: Business Plan

Classical Innovations will be transparent, efficient, and compliant with all laws in its budgets and financial operations. That philosophy is the foundation of the school's business plan. Classical Innovations will target the public funds entrusted to it to accomplish the mission as explained in this charter, consistent with the approach approved in this charter, and in line with state laws and regulations governing public education and the use of public tax dollars.

Key Budget Assumptions

Classical Innovations' budget will turn the board's priorities into numbers—a budgetary plan, consistent with this charter, that administration will carry out. If anyone wants to know what the school considers most important, they will need only to look at the priorities contained in the school's budget. At every step of the budgeting process, the school's mission, vision, and purpose as contained in this application will shape the final product. From the deployment of teachers and administration (see Section 7 of this application), to the facility (see Facility subsection of this section), to the money available for the purchase of technology to access original source material. Below, you will see how the school has prioritized the unique aspects of its educational program, ensuring that the charter's vision can be supported with dollars as the school opens and educates students.

The budget template, in required format, is submitted with this application, along with a cash flow projection for the first operational year.

The budgetary plan

Planning Year: As the school begins its planning and startup year, Classical Innovations will apply for the available grants, loans, and other funding that will provide resources to successfully plan and lay the foundation for a successful charter junior high and high school. It is anticipated that \$360,000 will be available to the school in its planning year in a combination of grants and loans from state sources. That money will allow the school to implement the following plan:

An **Academic Director** will develop the school's curriculum plan and integrate original sources throughout the curriculum. This work includes working throughout the second-half of the planning year to organize printed and online resources that teachers can use to structure the classically-based educational model in classrooms when school opens. The development of the school's curriculum resources and vendor partnerships (see Section 4) will be the AD's primary job in the planning year. Secondly, the AD will assist in the hiring of teachers, under the supervision of the School director.

A **School Director** (see recruitment plan in Section 7) will spend the planning year building the school's enrollment through public relations and marketing and putting in place the infrastructure (equipment, furniture, personnel) that will support and implement the school's program in the operational years. The School Director will coordinate with the Academic Director on the hiring of all teachers and support staff, work with the school's chosen

developer to ensure facility completion, and with the school's Business ESP to ensure that all operational, financial, and HR systems are in place prior to school opening.

An **Office Manager** will oversee and track student records and enrollment, generated through the school's marketing efforts, and coordinate family and community events for enrolled and prospective students.

An advertising campaign, budgeted at \$15,000 (line 21.300 in the budget document) to build awareness and recruit students to attend Classical Innovations, overseen by the Director. A recruitment campaign to recruit teachers, budgeted at \$5,000 (line 22.300), which will pay for advertising of job openings, presence at teacher hiring fairs, as well as funds to support recruitment and relocation assistance for classically-trained teachers, supporting a key component of the school's charter.

- \$67,400 (line 24.300) for two ESPs (see Section 9) to provide startup services in the planning year and charter development services that are currently ongoing and which will continue into the planning year.
- \$20,000 (line 45.400) for a building officer to represent the school and to fulfill state compliance standards during facility acquisition and/or construction
- \$2,000 (line 26.500) for liability insurance and communication (Internet and telephone) services in the planning year.
- Educational equipment (lines 22.660 and 10.700) which includes the desks, chairs, and other furniture and equipment one might commonly find in any school, plus projectors, electronic tablets, and computers and network equipment that will provide students with the furniture and equipment necessary to carry-out the original-source, classically-based program that is key to the charter. This is budgeted at \$134,000 in the startup year with additional to come in the first operational year.
- Computers for administration and faculty, budgeted at \$16,900.
- The school's administration, with the above tools, will have Classical Innovations in prime position to educate 360 students as the school opens in 2016, supported by the budget outlined below.

Operational Year 1: The school will continue to invest its dollars to support the program outlined in this charter. As the school operates, Classical Innovations will have somewhat lower expenses than many other schools in supplies and curriculum, as the original source materials that are the basis of our curriculum are available free online and for low cost in printed material, as they are largely in the public domain. The school will invest in instructional technology for use by both faculty and students to access online sources.

More specifically, the operational year budgets include:

- State and federal revenue based on the provided funding worksheet plus reasonable assumptions for special populations funding based on schools of similar size.
- Local funding based on enrollment, assuming that 25% of students will qualify for and eat school-provided lunch, with 50% of the rest also buying school lunch, 75% of

students paying \$150 per year in fees, and an average of \$50 per student in fundraising and school activity revenue.

- 21.75 full-time teachers, including a special education teacher, which puts the teacher to pupil ratio throughout the school at 23:1.
- The budget includes a \$2,000 average bonus for teachers paid based on student and parent satisfaction, academic achievement, professionalism, and classroom observations.
- These teachers are supported by an administrative team of the School Director and Academic Director (see Section 7), who will administer all educational and student programs, including student discipline, teacher development, and charter fidelity. The administrative team also includes two FTE school receptionists/secretaries, who keep the school's trains all running on time.
- Teachers are further supported by part-time paraprofessionals—three per grade level (one each in Science, Math, and Language Arts). These assistants will provide additional instruction, pull-out groups, and work individual student tutoring for at-risk students or students otherwise in need of additional academic assistance. An additional three paraprofessionals will specifically serve Special Education students, assisting teachers in providing enhanced services or other component of education required by an Individualized Education Program.
- The faculty and students in school will be supported by school counselors and media specialist. These positions are important because they are required by law, and they also provide students with the guidance they will require to be successful in the classically-based, media- and technology-rich environment that Classical Innovations will create for students.
- Of course, the school will also have a janitorial staff to clean and maintain the school's facility.
- The school will put in place retirement, medical, and other benefit programs to ensure that the school offers a competitive compensation package for educational professionals. Total benefits are budgeted at 24% of wages and salary.
- Classical Innovations will invest \$20,000 in the professional development of teachers, bringing in trainers and faculty with expertise in classically-based and Socratic education models, as well as the leaders of classical education universities and colleges that regularly train teachers in the charter's philosophy. This training will be regular and ongoing, supported and enhanced by the School Director and Academic Director.
- Classical Innovations will outsource its Information Technology support and Business Services (see Section 9). The cost of these two contracts combined are budgeted to be \$125,000, which is realistic based on the school's research and review of similarly-sized schools financial reports.
- The school intends to have lunch brought to the school, likely through a local school district that already provides such services to other charter schools.
- The school's facility budget is calculated as follows:
 - \$1 million for land
 - \$115 per square foot to construct a facility at 75 square feet per student at full capacity

- The total costs of acquisition and construction at about \$4.5 million, leading to annual lease payments of just over \$450,000, plus a small amount for property tax in the first year, expanding into the second year after a full year of occupancy. In the first year, occupancy costs are shown lower because occupancy will only be for 90% of the school year.
- The facility's utility, telephone, maintenance, and supply costs are also included in the budget, on lines 45.400, 26.500, 26.600, and 26.700, adding an additional \$90,000 per year in maintenance and operations costs. In total, occupancy and related expenses make up 19% of state revenue, which is well in line with both State Charter Board guidance and industry standards for affordability. In Year 2, costs rise as the school occupies its facility for a full year and pays a full year of property tax, increasing the ratio to 22.6% of state revenue and just over 20% of total revenue.

Textbooks, instructional equipment, and supplies should really be considered as a combination of planning year and first operational year expenses. The startup grants and loans that span those two fiscal years will largely purchase the materials, supplies, and equipment that will be used by teachers in the first operational year. As mentioned above, about \$134,000 from grant and loan proceeds will be used to purchase materials, computers, and furniture that students and teachers ultimately use in the first operational year. The combined total for these expenses in the first two years are just under \$200,000, with about 20% of that expense ongoing and reflected in the second year operational budget. The remaining 80% is one-time in nature and won't be repeated for several years until a technology refresh and replacement texts are needed. This startup investment will provide the school with the tech infrastructure, instructional tools, and open-source curriculum materials needed to implement the school's program and achieve its mission as contained in this charter application.

The budget includes repayment for the school's anticipated debt (see below), dues to join the state charter school association, and a place-holder amount for higher-than anticipated maintenance costs.

Contingency

Classical Innovations has seen charter schools make plans for enrolling several hundred students, only to short and face financial catastrophe. These schools have been forced to relocate far from their originally planned sites, cut back severely on their program in order to meet facility obligations, sought charter amendments to add additional grades, and even at times resorted to violating their charter by outsourcing the education of students to private companies while counting those students in enrollment at the school.

Classical Innovations has therefore been more modest in approach. Instead of seeking approval for 600 to 1,000 students, Classical Innovations' board believes that starting smaller is more realistic. Therefore the budget and this charter plans for 415 students in grades 7-12. By managing our expectations in line with the historic reality of charter high schools and structuring our size and grade offerings with what the industry has shown it can support, Classical Innovations will be better able to handle the unexpected.

Classical Innovations' contingency budget protects key aspects of the mission and educational program, though at sometimes lower amounts consistent with the financial realities presented by low enrollment numbers. The contingency plan makes the following changes:

- Enrollment is only 75% of capacity.
- Local, State, and Federal revenue fall in line with actual enrollment as the laws affect each specific program.
- Because compliance standards do not change with enrollment, and because administrators are likely to redefine "overwhelmed" during the startup year anyway, school administration, in the first operational year will stay largely the same as if enrollment was full, though with reduced bonus potential. In the second year, if enrollment remains at a lower level, administrative staff will be reduced by a total of 1.5 FTE.
- The number of teachers falls mostly in line with enrollment. Class sized increase slightly (20.8:1).
- The number of paraprofessionals will be reduced to two per grade level.
- The teacher bonus program will be delayed until enrollment can justify the expense.
- Janitorial pay will go down as the school hires lower-wage workers and requires fewer cleaning hours with fewer students.
- Retirement benefits will fall as the school delays its implementation and reduces the "match."
- Health insurance premium support will fall slightly in year two as cost increases may be passed along to employees.
- More professional development will be the responsibility of the director and/or shall be conducted remotely, saving on travel costs, but still protecting the important training in classically-based methodology
- The Business Administrator ESP and IT support will be reduced to part-time service. This flexibility is another reason the school elected to outsource these functions rather than hire in-house, thereby decreasing the school's flexibility in reducing costs in these areas.
- Food services expenses will fall commensurate with enrollment.
- Occupancy expenses stay largely the same. Adjustments are made for occupancy costs that adjust with enrollment (supplies, water and utilities) but not for those that don't (lease, property tax.)
- Supplies budgets fall commensurate with enrollment, which is felt particularly in the first operational year, since so many dollars were already spent in the planning year. With fewer students, the school will need to purchase less to complement what it already bought with grant and loan funding.
- These plans still protect the school's unique program, though there will be some loss initially in having face-to-face interactions with trainers and partners as travel costs are pared back. Still, the school will invest its more limited resources in this scenario to put forward a quality program, while still building financial viability for the long-term.

Debt

Classical Innovations has no plans to incur direct debt to acquire its facility, at least not in its beginning years. The school hopes that it will eventually be judged stable, viable, and of high enough quality to qualify for the issuance of tax-exempt bonds at a low rate to finance the purchase of a facility. However, the plan presented in this application calls for the school to engage a charter school developer to purchase either an existing building or land on which to construct a new school building. At this time, the school is considering both options, as presented below in the Facilities subsection.

The only debt the school plans to incur is the State Charter School Revolving Loan, which is available to Classical Innovations to pay for startup expenses during the planning and first operational year. The school intends to borrow \$220,000 to provide additional financing (with the State Startup Grant) for the planning year and to acquire the necessary materials, technology, and equipment to begin school in 2016. The school has budgeted \$57,200 per year in debt service to repay this debt over the four year of repayment the program requires.

Policies and procedures

The school's board has adopted a comprehensive set of finance policies consistent with Utah Code. These policies cover use of funds, internal controls, purchasing, bank accounts, signatory authority, and every other aspect of financial management and are included with this charter application. Please see these policies for specific details on how the financial controls and procedures at Classical Innovations will work on a day-to-day basis.

The principles behind those policies will guide the school in all financial management and transactions. These principles are based on the school's legal financial obligations, Generally Accepted Accounting Practices, and common sense measures to ensure openness, integrity, and value within all financial transactions. Those principles are:

- Segregation of duties so that multiple people are involved each time money changes hands to reduce the likelihood of fraud
- Oversight by regular internal (a board finance and audit committee) and external (an independent auditor consistent with Classical Innovations' LEA status) methods
- Internal review each month with a board finance and audit committee, which samples transactions for compliance with school finance policies
- Transparency in budgeting and spending, with all transactions and budgets posted online as required by law
- Competitive bidding for large projects to ensure fair treatment of all and best value for the school and taxpayers
- Proper authorization, ensuring that all expenses are known and approved by the Director, Finance Committee, or the Board prior to expense is made so that authority to spend money is tied directly to accountability for the school's budget.
- Protection of the school's assets with accurate inventory records, duplication of data, holdings spread across multiple banks, and insurance to indemnify employees, the board, and the school from tort claims

- For example, the school will spend money on school supplies or classrooms. The procedure outlined below is similar to the procedures in all aspects of school finance, going from receiving money, spending money, and proper accounting of all aspects. (Please note how at least two parties and documentation are involved each time funds change hands.)
- A parent comes to the school to donate to the school. The parent gives \$20 cash to the school secretary, who writes out a duplicate receipt, providing one copy to the parent. Money goes from the parent to the school, with two people involved (parent and secretary) with documentation (receipt) of the transaction viewed by both parties.
- The secretary keeps an electronic log of all such transactions, and three times each week, prepares a deposit. All funds (cash or check) are counted and compared to the electronic log and the duplicate receipts. When totals match, the deposit is reviewed by another administrator for accuracy and initialed.
- The secretary (or another administrator that) takes the funds to the bank, where a receipt is collected that matches the amount on the school's internal records. Again, two people (bank teller and school administrator) are involved when funds change hands with documentation (receipt and deposit log) kept by both parties.
- The secretary gives the deposit log and receipt to the Business ESP for input in the school's accounting system and for comparison to the bank's online records.
- The Business ESP reconciles the account, noting that the bank statement agrees with the school's internal records. The Business ESP provides a copy of the reconciliation and original bank statement to the school's finance and audit committee.
- A teacher determines a need to purchase modeling clay for a project. She searches online for the kind of clay needed and compares prices, including one local vendor to potentially save on shipping costs. The teacher completes a requisition form, signs it, and hands it to the school director.
- The director reviews the purchase request, including the documentation on pricing and the rationale for the purchase, and signs approval for the item to be purchased, giving the form to the school secretary for potential purchase. (If the clay is better purchased directly by the teacher for the sake of expediency, step eight will be skipped.)
- The secretary places the order (along with other items from the same vendor), assigning it a purchase order number according to school policy.
- When the clay arrives with a packing slip (prepared by the vendor), the school secretary (or potentially the teacher) will be count the items, compare for accuracy to the original order and packing slip, and initial for accuracy or call the vendor in the case of inaccuracy.
- Initialed packing slip (or invoice) will be attached to the original purchase order (or requisition form, if the teacher purchases directly) and submitted to the Business ESP for payment.

- Business ESP will review all paperwork for accuracy, authorization, and compliance with school policy, and then prepare a check made to the vendor (or teacher, in case of reimbursement), attaching it to the supporting paperwork and giving all documentation to the school director.
- The school director reviews all paperwork, including the check, comparing for accuracy and policy compliance throughout, and signs the check, returning all paperwork to the school secretary for disbursement.
- Secretary mails the check to the vendor (or gives the check to the employee).
- The check clears the bank, and the Business ESP notes such as it reconciles accounts, providing a copy of the reconciliation, bank statement, and complete finance reports for review by the finance and audit committee.
- The school's Business ESP will be charged with carrying out the day-to-day management of the school's finances consistently with these principles. The Business ESP will ensure that the school's assets (cash, buildings, and equipment) are adequately documented and protected, that school finance policy and state law are followed in all transactions, and that student enrollment records are accurate and reported to the state daily.
- The Business ESP will be responsible to submit comprehensive Annual Financial Reports to the board, the State Office of Education, and the State Auditor's office as required by law. In all aspects, the Business ESP will adhere to Generally Accepted Accounting Practices, state law, and the school's finance policies. If necessary, the board will provide external training and oversight to ensure that GAAP is fully in place upon the receipt of any public funds (including funds donated to our public school from private sources). Additionally, the Business ESP will work with the Board and the school's insurance brokerage to ensure that the school is properly insured, that grants and all restricted streams of funding are properly administered according to each source's guidelines, and that the school meets all other key financial obligations that are part of any state law or rule now in place or that may be in place in the future. The Business ESP and a school representative will attend semi-annual finance training to stay abreast of changes in state law regarding school finance.
- In all of these oversight and managerial tasks, the Business ESP will be supported by the two school secretaries, one of whom will have specific responsibility to manage student records and will carry the additional title of Registrar. (See Roles and Responsibilities subsection of Section 7 for day-to-day description of duties.) The designation of a single person to serve as registrar also will ensure that the school has the capacity to develop adequate policies and processes for tracking enrollment and attendance eligibility, eligibility for free and reduced priced lunch, students with disabilities and ELL enrollment. The registrar will submit data to the state and the school director regularly to ensure that records are accurate.
- Financial and student records will be stored in both paper and electronic formats. Paper records will be stored in fire-proof filing cabinets that lock to protect the records' integrity and security. Electronic records will be stored in the school's Student Information System (enrollment and student records) and in the Financial Information System (financial records). Both systems will be backed up to an off-site storage server

regularly to ensure that they are maintained in emergencies or after any disaster or crime.

Facility

Classical Innovations has researched existing buildings in the target area, and there are none which are currently available that would meet the school's needs, even with substantial remodeling. The Board of Trustees has determined that constructing a new facility will be the most cost efficient way to fully implement the school program to achieve the school's mission and vision.

Upon charter approval, the Board will issue an RFP for a developer to acquire land, build the facility, and provide the school with a lease and eventual purchase option. In evaluating the RFP responses, the Board will look to select a developer who can meet the facility needs of the school while keeping occupancy costs within Charter School Performance Framework metrics. The facility will be located on approximately four to five acres of ground. The main building will need to be approximately 33,000 square feet and will include an office area, gymnasium, kitchen, library, eighteen classrooms, and multiple collaboration areas.

Classical Innovations has identified several pieces of ground, both on and off the market, which would accommodate the school and be within the price range to make it financially feasible. Exact locations are available upon request, as the school prefers not to disclose the locations as part of strategic real estate planning.

The following timeline has been established to ensure the facility is completed on time. As required by state law, the Board will appoint a board building officer who will oversee the process. This person will coordinate with the developer to make sure the facility is completed in a timely manner and will be responsible for filing the necessary construction documents and paperwork with USOE throughout the course of the project.

- April 2015—Final Charter Approval
- April 2015—Issue RFP for a developer immediately upon approval
- May 2015—Select and enter into an agreement with a developer by the end of the month
- May-June 2015—Determine exact location and developer will begin process of land acquisition
- June-August 2015—Facility design
- August 2015—Property acquisition complete
- August-September 2015—Permitting
- October 2015-July 2016—Construction
- August 2016—Classical Innovations occupies building

Opening Timeline

From the time of the approval of this application until the time school opens, Classical Innovations will have a lot of work to do! Classical Innovations has engaged Endeavor Education, LLC (see Section 9 for full details), who will assist the school with several important start-up activities in the planning year, including:

- Assisting the school with applications for startup grants and loans
- Assisting the school with its application for tax-exempt status
- Connecting the school with a developer who will work with the school to secure a facility (see Facilities subsection above)

The school will also engage an Education Service Provider during the planning year to help establish policies, a payroll system, an enrollment database and lottery software, financial controls, employee benefit programs, comprehensive policies, financial management and reporting, and general assistance with the startup calendar. The specific ESP has not yet been identified, but will be identified and selected in a manner compliant with state purchasing laws and rules, including the issuance of an RFP for any service with a cost of more than \$50,000 per year.

Other aspects of startup work will be completed by the school's administration and pool of parent volunteers. The administration will establish startup committees, staffed by volunteer parents with expertise in specific areas. Those areas are:

- Facilities and furnishings
- Curriculum
- Enrollment
- Marketing
- Technology
- Volunteer Organization

In the first six months after the charter is approved, the board will undertake the following activities in the timeline specified:

- Spring—apply for startup grants and loans, with assistance from Endeavor Education
- Spring—Update school's website with approval information, enrollment timelines and database, and post required information and disclosures
- Spring—Issue RFP for facilities and by early summer, select a development partner
- Spring—apply for tax exempt status with the IRS and establish state tax ID numbers
- Spring—Adopt and submit a startup and planning year budget
- Spring—Open bank accounts
- Summer—Begin enrollment and marketing campaign, collect student and family information on website
- Summer—issue RFP for startup services and select startup services partner
- Summer—begin attending Directors' meeting and submitting monthly financial reports
- Summer—finalize facility plans consistent with approved budget

- Fall—Begin search for used furniture and fixtures
- Fall—Begin designing curriculum and training programs, identifying publishers, authors, and project models for purchase
- Fall—Establish payroll systems and benefit programs for employees who begin in January
- Fall—Draft policy manual based on legal requirements, state guidance and templates, and resources available through other resources and existing schools
- Winter—Begin construction on facility
- Winter--Establish volunteer committees from among registered and interested families
- Winter—Begin formal enrollment procedures according to policy
- Winter—Hire Director and support staff according to approved grant and loan budgets
- Winter—Arrange for lunch provided by a local school district or charter school

Once the director, the Business ESP, and volunteer committees are in place, the school board will transfer the new and increasing workload from January through the start of school to the director's purview, as the board begins its transition to a policy governance model. The director (along with support staff), the startup ESP, and the volunteer committees, will then proceed along a timeline similar to that outlined in the Planning Year Timeline document included with in this section. This timeline begins with the end in mind, listing the top activity as the beginning of school, and then working backwards in time to ensure that all pre-steps are completed.

This timeline does not list all meetings that the director or support staff will attend. The timing, frequency, and location of these meetings is not known. However, the school director or his designee will attend state- and mentor-provided trainings in:

- Student Information Systems and requirements
- Teacher licensure requirements and CACTUS
- Special Education
- Title I
- School Lunch
- Charter Directors' meetings
- Utah Consolidated Application
- Assessment and accreditation
- Other required meetings

The school's plan also calls for flexibility. Over time, the charter school industry learns from experience how to do things better. Classical Innovations anticipates that in the two years between the submission of this application and the start of school, new state systems may be in place than exist today. New training programs will be available. New resources can be shared. New experts will emerge. Classical Innovations will take advantage of these in helping the school to successfully plan and open school.

Classical Innovations believes that the entirety of this plan is reasonable, based on our research of the industry's best practices, and is likely to succeed. That success will look better with full enrollment, but with good planning as explained in this section, the school will be available to adjust to likely scenarios with contingencies. We don't know exactly *what* will happen, but are confident that *something* will happen that causes the school to change plans or fall back on contingency plans. In either case, the school will be well-prepared, well-trained, and will execute a well-designed business plan. A comprehensive startup timeline follows.

Timeframe	Business/HR	Facilities	Curriculum	Enrollment	Marketing	Technology	Volunteer Org
Late August	SCHOOL BEGINS!						
Mid August	<ul style="list-style-type: none"> Complete hiring all staff (custodial, aides, office) Train all staff in benefit programs and HR policy & procedures (coordinate w/ benefit providers) 	<ul style="list-style-type: none"> Final facility inspection Create punch list Assemble and move furnishings (work with PTO on coordinating volunteers) Track where assets are located in building 	<ul style="list-style-type: none"> Number texts and curriculum materials Move curriculum and materials into building and organize Checkout C&M to teachers and distribute to rooms 	<ul style="list-style-type: none"> Gather final paperwork from parents Complete collection of student records from previous schools Assign any new enrollees to classes 	<ul style="list-style-type: none"> Publicize school's opening and ribbon cutting 	<ul style="list-style-type: none"> Final hookup and testing of school's computer network Assign email addresses to all staff Check computers out to staff; train staff on policy and use of technology 	<ul style="list-style-type: none"> Coordinate volunteers for all committees Hold school launch activity and fundraiser Collect volunteer forms from parents Host facility open house
Early August	<ul style="list-style-type: none"> Finalize instructional staff and key office staff Place ads for schoolhouse staff and any remaining positions Instructional staff begins work as employees 	<ul style="list-style-type: none"> Work with builder and developer to resolve remaining problems or potential problems Ensure and participate in building inspections 	<ul style="list-style-type: none"> Finish receiving ordered C&M Call vendors for information on back-ordered items and develop contingency plans Work with teachers on classroom specific supply requests 	<ul style="list-style-type: none"> Continue collecting student records from previous schools 			<ul style="list-style-type: none"> Host before school fundraising activity
Late July		<ul style="list-style-type: none"> Work with builder and developer to resolve remaining major issues 		<ul style="list-style-type: none"> Continue collecting student records from previous schools 			<ul style="list-style-type: none"> Finish preliminary carpool combinations and inform parents.
Mid July		<ul style="list-style-type: none"> Schedule the school move-in; volunteers, tasks, etc. 	<ul style="list-style-type: none"> Prepare C&M for distribution 	<ul style="list-style-type: none"> Continue collecting student records from previous schools 		<ul style="list-style-type: none"> Receive computers and coordinate with Facilities committee in inventory control 	
Early July	<ul style="list-style-type: none"> Business Manager will begin assuming schoolhouse business and finance responsibilities Hire Office Manager or School secretary Hire additional administrative staff Administrative staff begins work as school employees 	<ul style="list-style-type: none"> Solicit donations of some equipment (microwaves, fridges, toasters, carts, chairs) from parents and businesses 		<ul style="list-style-type: none"> School Secretary or Office Manager will begin assuming schoolhouse enrollment responsibilities Continue collecting student records from previous schools 			<ul style="list-style-type: none"> Begin developing carpool plans and putting together families.
Late June	<ul style="list-style-type: none"> Implement medical and other benefit 	<ul style="list-style-type: none"> Continue receiving and purchasing 		<ul style="list-style-type: none"> Send final acceptance letters; 		<ul style="list-style-type: none"> Purchase computers for students and 	

	programs to be in place in July when more employees begin work	needed equipment and furnishings • Watch for used furniture from schools that may be closing or replacing equipment		deadline for acceptance is June 30		teachers	
Mid June	• Compile necessary items for employee packets to include handbook, benefit program information, and legal paperwork	• When receiving equipment, count to ensure accuracy and quality, tag with asset tags, and track on asset tracking form.	• As curriculum purchases arrive, check for accuracy and quality • Number materials as they arrive and develop a tracking sheet for inventory control, especially if items are stored at different locations	• Collect enrollment paperwork from parents; enrollment deadline is June 15 • Begin placing students in classes	• Continue marketing as necessary to ensure adequate enrollment		• Develop plans for parent volunteers, including forms, outreach, and organization
Early June	• Complete employee handbook and send to board for approval	• Develop inventory control procedures and order asset tags	• Watch ads for screaming deals on school supplies and make purchases as appropriate	• Make final push for applications	• Work with PTO to publicize summer events and general awareness of school and mission		• Recommend any lunch program to board for approval
May	• Meet with benefit providers to customize benefit programs • Begin employee handbook draft • Submit budget for board approval	• Begin weekly building inspections • Use “Facilities Progress” form to track progress and document problems to builder and developer in writing • Sign service agreements with outside providers • Coordinate for temporary storage of furnishings and equipment	• Coordinate for temporary storage of curriculum and materials • Present classroom supply recommendations to board for approval	• Contact parents to receive enrollment information and forms. • Develop a “Health and Safety” form for parents to use for enrollment past regular deadlines	• Finish marketing plan execution	• Contact UEN (Utah Education Network) about providing free high speed internet for the school and verify infrastructure requirements are met; plan for alternate service if necessary	• Get proposals from caterers for school lunch program
April	• Finalize teacher salaries based on legislation • Develop salary agreements and sign with all current staff and new staff as hired • Begin hiring additional	• Inspect building progress bi-weekly • Be really picky; no detail is too small—the builder is being paid to build it to your specifications • Place all furnishings orders • Apply for credit as	• Place all C&M orders • Apply for credit as necessary • Begin analysis of classroom supply needs	• Receive acceptance letters. Deadline for initial acceptance is April 30.	• Execute marketing plan with goal of receiving applications from parents by May 31.	• Get board approval for any recommendations for equipment or services • Create email accounts for any hired staff	• Finalize dress code and submit recommendations to board for approval • Host Spring Fundraising activity

	<ul style="list-style-type: none"> administrative and instructional staff Draft Budget 	<ul style="list-style-type: none"> necessary Present service recommendations to board for approval 					
March	<ul style="list-style-type: none"> Attend teacher hiring fairs and interview teaching staff Send offer letters and follow up Review legislative action related to school funding and regulations 	<ul style="list-style-type: none"> Create “Facilities Progress” form to track construction problems and progress Get proposals from providers of goods and services for school facilities (see Startup Facilities List); present recommendations to board for approval Research options for low-cost or used furnishings Evaluate cost/benefits of purchase versus lease of certain goods and services 	<ul style="list-style-type: none"> Finalize curriculum recommendations and present to board for approval Seek competitive bids from various vendors to ensure best value (use bid tracking form) 	<ul style="list-style-type: none"> Make follow up calls to enrolled parents; dog them and make sure they return acceptance forms and other paperwork 	<ul style="list-style-type: none"> Develop marketing plan and budget for April through June and submit to board for approval 	<ul style="list-style-type: none"> Finalize network plans and budgets Find email service and create board email addresses, if not already done 	<ul style="list-style-type: none"> Draft dress code standards Investigate school lunch requirements and options
February	<ul style="list-style-type: none"> Register for teacher fairs Place ads for teachers on teachers-teachers.com and other places 	<ul style="list-style-type: none"> Begin regular inspections of building site 		<ul style="list-style-type: none"> Big push for applications by third Friday in February Hold initial lottery and send enrollment packets to lucky parents 	<ul style="list-style-type: none"> Big push for applications by the third Friday in February 		
January	Establish Executive Committees—Hire Director						

Section 9: Education Service Providers

Classical Innovations intends to contract with an Education Service Provider.

Classical Innovations has entered into a contract for services with Endeavor Education, LLC (EE) to help the school develop its charter application, guide it through the approval process, establish the legal and tax framework to conduct its operations, and assist with startup and facility development funding.

We also intend to contract with a Business ESP to startup and manage the school's non-instructional operations, including establishing policies, a payroll system, an enrollment database and lottery software, financial controls, employee benefit programs, comprehensive policies, financial management and reporting, and general assistance with the startup calendar. The specific ESP has not yet been identified, but will be identified and selected using a process that meets State law and Board rule for procurement as outlined in 63G-6a and Board rule R277-113.

ESP Services in General

New charter schools face the full burden of compliance upon approval. Schools must develop dozens of required policies, put in place a slew of best practices, develop forms, and have internal systems working right from day one. Classical Innovations has chosen to pursue engagement with professional Education Service Providers with experience and ready-made systems, policies, forms, and practices that can be easily reviewed, adopted, and implemented at the school.

In surveying the charter landscape, Classical Innovations' board has found that new schools face a very hard time finding individual employees with the expertise needed. Individuals with that knowledge in the charter space are already employed, either by ESPs or by schools directly. Because compliance must be in place upon approval, the board does not feel it has sufficient time, resources, or regulatory latitude to allow for an individual employee to "learn on the job." Those responsible for compliance must have the knowledge and experience of compliance standards and practices upon hire. The board has noted that almost all new schools opt to engage ESPs—even schools with significant expertise and experience (like Esperanza Academy and Utah Military Academy)—rather than hire such staff directly. By all appearances, this has become the industry best practice.

Classical Innovations wants to do it right from the start, so we will work with ESPs who bring all the training, experience, and successful track record with them.

This specific ESP

Endeavor Education, LLC is a unique organization in Utah. It exists specifically to help groups of individuals develop quality charter school applications, navigate the process of submission and approval of the charter application, establish the corporate and non-profit structure of the school, and facilitate the school's facility development.

When Classical Innovations' board first started putting together the group that would become the school's founders, we reviewed several options for developing a quality charter application and ultimately a quality school. We called around for references. We attended State Charter Board meetings and New Applicant trainings. In those meetings we came in contact with Endeavor Education, LLC, and saw the quality work they had done for other schools, and their track record in helping groups like ours draft charters with plans that meet State Charter Board approval.

The Board determined that Endeavor Education, LLC was the only group in Utah that was willing and had a successful track record to do all that Classical Innovations needed at that point. Those abilities and qualities included:

- The ability to assist with the entirety of the charter application process (many firms had specific focus on finance and operations or other limited areas)
- Prior success in shepherding a school through the entire startup process
- Willingness to complete all work with no payment due until the school achieved the ability to pay
- Willingness to complete work on contingency, such that if the charter was not approved or could not secure a facility for any reason, no payment would be due
- Specific knowledge of Davis County's educational landscape
- No requirement, either explicit or implied, for continued work with the firm, or any other firm, beyond the scope of the original agreement. Classical Innovations did not want to engage someone up front only to have to pay higher development or management costs on the back end of the deal.

Endeavor Education is the only firm that the board could identify that met all these criteria. Selection was made consistent with state law and Board rules for procurement as outlined in [63G-6a](#) and Board rule [R277-113](#).

Further, Classical Innovations' board received positive references from previous clients of Endeavor Education and its leadership. Research showed that charters on which Endeavor Education and their principals were involved were historically among the highest rated charters in their cohorts, which track record gave Classical Innovations' board tremendous confidence in the firm's ability to help our board craft a quality application and open a quality school. Since Endeavor Education does not provide services to students and is not in any way involved in the instruction or programmatic aspects of the school's operation (in fact, the Agreement will end well before school opens), the board did not consider if the ESP had any success in serving student populations similar to Classical Innovations' population. There are simply no student population services in the Agreement.

Endeavor Education's services are short-term in nature, so there are no instances in the organization's history of a terminated or non-renewed contract. There were also no instances of a contract that did not lead to ultimate approval of a charter. Current clients of Endeavor Education are:

- Utah Military Academy—Matt Throckmorton, Director, 615.339.3349
- Athenian eAcademy—Matt Throckmorton, Founder, 615.339.3349
- Roots Charter High School—Tyler Bastian, Founder, 801.573.8719
- Terra Academy—Cassie Hays, Founder, 435.790.1518
- American Academy of Innovation (applying)—German Lopez, 201-201-5030

The relationship between Endeavor Education and Classical Innovations' board is designed to maximize accountability. In all aspects of the service that Endeavor Education provides to the school, the board retains all decision-making authority and final approval of everything that the ESP produces. The board assigns Endeavor Education to draft certain documents or to complete certain tasks. The drafts or projects are submitted to the board for editing, feedback, and review. Endeavor Education makes requested changes or improvements and resubmits them to the board. This process continues until the board is fully satisfied with the work product that Endeavor Education produces. In all cases, the ESP provides expertise, assistance, and advice to the Board, and the Board makes all decisions and determines the quality of work. This structure furthers the mission of the school by putting the board's vision of the school at the forefront, and then having all work product of the ESP evaluated in light of the twin pillars of the school and the board's vision of how those pillars will be implemented. Endeavor Education, as would be the case with any employee or volunteer, exists solely to carry out the wishes of the board in the areas of the ESP's specific expertise.

A Business ESP

After approval, Classical Innovations intends to seek the services of a professional individual or firm to assist the school with startup activities and ongoing business management to ensure that the school has the infrastructure, policies, practices, and other necessary structures in place by the time school opens and the expertise once school opens to comply with the myriad finance and purchasing rules that are now subject of the Utah Criminal Code. The school will seek a firm that can provide the following services and offerings:

- Provide a comprehensive policy manual template that the school can edit and adopt
- Establish payroll systems and employee benefit programs
- Establish purchasing procedures and policies that are consistent with GAAP and state law and that will be judged adequate by the school's independent auditor
- Assist in identifying needs for compliance in areas of student information, website development and content, child nutrition programs, federal funding requirements, state reporting, the Utah Consolidated Application, and managing grants and loans
- Provide customizable Governmental Accounting Software that meets the requirement that Charter Schools use a uniform chart of accounts

- Place a full-time business manager on the school's campus to work directly under and with the school's administration in financial matters and respond directly to school employees on financial, HR, and related matters
- Offer flexibility so that if the school's enrollment is below projections, the service offering and cost can be adjusted without material changes that would affect school financial compliance

Classical Innovations will follow Utah procurement law as outlined in [63G-6a](#) and Board rule [R277-113](#) in making the selection of any independent contractor that provides services to the school, including this planned Business ESP.

The relationship between the business services ESP and Classical Innovations' board will be structured, as the Endeavor Education Agreement is, to maximize accountability for performance to the school and to the Board. In all aspects of the service that the ESP provides, the board retains all decision-making authority and final approval. If the product from the ESP does not meet the board's standard, the work is redone in light of the board's further guidance and specific feedback. If work is done poorly to the point that the school believes a change is in order, the structure will allow for at-will termination of any Service Agreement so that Classical Innovations can find a better option. This structure furthers the mission of the school by putting the board's vision of the school at the forefront, and then having all work product of the ESP evaluated in light of the twin pillars of the school and the board's vision of how those pillars will be implemented. In all relationships with compensated entities, whether employees or contractors, the parties' sole responsibility is to carry out the wishes of the board designated areas of expertise.

The board will adopt accountability standards for financial performance consistent with its authorizer's Performance Standards and will hold the ESP accountable for the school's financial outcomes related to those standards.

Since this ESP will have some startup financial management role, the service agreement will specify that the ESP will follow all the same financial procedures contained in this charter application and in the school's finance policies. The ESP will be just one party in a system that includes segregation of duties between the board, the director, the ESP and those that request spending or reimbursement. The ESP will not have authority to make disbursement without prior director or board approval. The director and the board's finance and audit committee will oversee all ESP-generated reports and have independent access to all school financial records.

At least two parties (with one party at some steps being the ESP) will be involved in each step of any cash receipt or disbursement, with each step being documented.

The example procedure in Section 7 will apply to the ESP as well, though during the startup phase, teachers will not be seeking reimbursement, and, prior to the procurement of a facility, more of the "changing hands" regarding documentation will take place electronically, with copies of email records serving as documentation. The example is modified as below:

- A parent comes to a school event to donate to the school. The parent gives \$20 cash to a volunteer, who writes out a duplicate receipt, providing one copy to the parent. Money goes from the parent to the school, with two people involved (parent and volunteer) with documentation (receipt) of the transaction viewed by both parties.
- The volunteer keeps a written log of all cash at the event and when it ends, counts all cash with another volunteer, compares cash to the records, and provides matched and jointly signed copies to the school director.
- The director takes the funds to the bank, where a receipt is collected that matches the amount on the school's internal records. Again, two people (bank teller and director) are involved when funds change hands with documentation (receipt and deposit log) kept by both parties.
- The director gives the deposit log and receipt to the ESP for input in the school's accounting system and for comparison to the bank's online records.
- The ESP reconciles the account, noting that the bank statement agrees with the school's internal records. The ESP provides a copy of the reconciliation and original bank statement to the school's finance and audit committee.
- The academic director determines a need to purchase desks for the opening of school. She searches online for the type of desks needed and compares prices, including sources for used furniture. The director completes a requisition form, signs it, and hands it to the school director.
- The director reviews the purchase request, including the documentation on pricing and the, and signs approval for the item to be purchased, returning the form to the academic director for purchase.
- The academic director places the order (along with other items from the same vendor), assigning it a purchase order number according to school policy.
- When the desks arrive with a packing slip (prepared by the vendor), the academic director will be count the items, compare for accuracy to the original order and packing slip, and initial for accuracy or call the vendor in the case of inaccuracy.
- Initialed packing slip and invoice will be attached to the original purchase and submitted to the ESP for payment.
- ESP will review all paperwork for accuracy, authorization, and compliance with school policy, and then prepare a check made to the vendor, attaching it to the supporting paperwork and giving all documentation to the school director.
- The school director reviews all paperwork, including the check, comparing for accuracy and policy compliance throughout, and signs the check, returning all paperwork to the ESP for disbursement.
- ESP mails the check to the vendor.
- The check clears the bank, and the ESP notes such as she reconciles accounts, providing a copy of the reconciliation, bank statement, and complete finance reports for review by the finance and audit committee.

In short, the ESP will not exist outside of the school's financial policies. The same procedures, oversight, and internal controls will be present with the ESP that are consistent with GAAP, state law, and with any auditor recommendations. The ESP will be held to the same standards and have the same ultimate accountability—the ability to be terminated at will—as any other employee at the school.

As stated above, Classical Innovations believes that the expertise needed to meet compliance standards with so many varied regulations over so many issues is unlikely to be found in an individual that the school can hire. But, the school believes that engaging a firm for the period of school startup, will provide the foundation and infrastructure in which the school's own administrative staff can successfully meet ongoing compliance standards from the time school opens forward.

Performance and Accountability

Endeavor Education's performance standards are spelled out in the attached Service Agreement. The ultimate accountability is in place—unless Endeavor Education meets all the terms spelled out in the Agreement, no payment is due. The firm is only compensated with the Board determines that all aspects of the Service Agreement have been met. At that point, payment is due and the formal relationship ends. As noted above, all Endeavor Education work product is evaluated by the Board, edited by the board, and ultimately approved by the board.

Accountability with the Business ESP will be based on the startup calendar included with this application, the results of the school's annual audit, and the school's performance in the SCSB Financial Standards, including the submission of reports and compliance with all state funding programs, including startup grants and loans. Each month, the ESP will report to the board on the status of reports and requirements, which the board will compare to its internal startup timeline and to the startup timeline in this application and the SCSB Financial Standards. The school will ensure that any agreement with any ESP will contain a provision for termination by the school with or without cause, so that incentives for high performance will always be in place and that the school can hold the ESP accountable with the ultimate threat of terminating services.

Appendix A: Waiver Requests

Classical Innovations is not seeking any waiver requests.

Appendix B: Memorandums of Understanding or ESP Contracts

ENDEAVOR EDUCATION, LLC

November 16, 2013

Classical Innovations Academy

Dear Mr. Brink

We are pleased that Classical Innovations Academy (the "*Client*") has asked Endeavor Education, LLC, a Utah limited liability company ("*ENDEAVOR*"), to serve as your advisor. This letter will confirm our discussion with you regarding your engagement of ENDEAVOR and will describe the basis on which we will provide services to you. Although we do not wish to be overly formal in our relationship with you, we have found it a helpful practice to confirm with our clients the nature and terms of our services.

Accordingly, we submit for your approval this letter agreement (this "*Agreement*") governing our engagement. If you are in agreement, please sign the enclosed copy of this Agreement in the space provided below. Again, we are pleased to have the opportunity to serve you.

A. Services. ENDEAVOR will serve as the Client's exclusive Charter Development Advisor with respect to the Client's efforts to secure a Charter Agreement with the State Board of Education. ENDEAVOR shall provide and devote such of its officers, directors, employees, agents, affiliates and consultants as shall be reasonably necessary for it to provide the Client any or all of the following services (the "*Services*") as reasonably required to satisfy the objectives of the Client to secure the Charter Agreement:

1. Assist with selection of members for the new school's board;
2. Assist Client's Board in drafting, editing, submitting, and securing approval of a Charter Application, consistent with Client's vision and under Client's supervision, with emphasis on the operational and facility sections of the Application;
3. Develop budgets for Client's approval to be included in the Application consistent with Client's vision and mission and guide the Client in operational and financial plans;
4. Assist the Client in forming a legal non-profit corporation in Utah and obtaining recognition as a non-profit entity from the IRS;
5. Assist the Client securing Utah Charter School Revolving Loan and State Startup and Implementation Grant after securing a Charter Agreement;
6. Consult on development of marketing materials and strategies and the recruitment of students during the startup period;
7. Assist the Client in procurement of facilities, including identifying and negotiating with a development partner (an entity or entities that develop the startup school's

In acknowledgment that the foregoing correctly sets forth the understanding reached by ENDEAVOR and the Client, please sign in the space provided below, whereupon this letter shall constitute a binding agreement as of the date indicated above. The undersigned represents that he/she has the authority to enter into this Agreement to bind the Client.

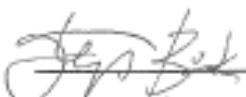
Sincerely,

ENDEAVOR EDUCATION, LLC

By: _____
Name: _____
Title: _____

Accepted and Agreed:

Classical Innovations Academy, a Utah nonprofit corporation

By: 
Name: Stephen Brink
Title: Chairman of the Board
Date: September 27, 2014

Appendix C: Budget Forms

Cash Flow Projection													
Classical Innovations													
Beginning Cash	\$ 25,165	\$ 234,505	\$ 269,314	\$ 230,842	\$ 236,697	\$ 242,552	\$ 248,408	\$ 284,269	\$ 290,124	\$ 295,979	\$ 316,838	\$ 322,693	
Revenue	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Local	\$ -	\$ 15,563	\$ 15,563	\$ 15,459	\$ 15,459	\$ 15,459	\$ 15,459	\$ 15,459	\$ 15,459	\$ 15,459	\$ 15,459	\$ 15,459	\$ 170,254
State	\$ 313,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 213,168	\$ 2,658,015
Federal				\$ 5,354	\$ 5,354	\$ 5,354	\$ 35,360	\$ 5,354	\$ 5,354	\$ 20,357	\$ 5,354	\$ 5,354	\$ 93,191
Total	\$ 313,168	\$ 228,730	\$ 228,730	\$ 233,980	\$ 233,980	\$ 233,980	\$ 263,986	\$ 233,980	\$ 233,980	\$ 248,983	\$ 233,980	\$ 233,980	\$ 2,921,459
Expenses													
Compensation	\$ 22,026	\$ 76,986	\$ 150,267	\$ 150,267	\$ 150,267	\$ 150,267	\$ 150,267	\$ 150,267	\$ 150,267	\$ 150,267	\$ 150,267	\$ 150,267	\$ 1,601,681
Services	\$ 32,323	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 67,457	\$ 771,534
Supplies & Equipment	\$ 43,963	\$ 43,963	\$ 43,963	\$ 4,885	\$ 4,885	\$ 4,885	\$ 4,885	\$ 4,885	\$ 4,885	\$ 4,885	\$ 4,885	\$ 4,885	\$ 175,850
Other	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 5,517	\$ 66,200
Total	\$ 103,828	\$ 193,922	\$ 267,203	\$ 228,125	\$ 228,125	\$ 228,125	\$ 228,125	\$ 228,125	\$ 228,125	\$ 228,125	\$ 228,125	\$ 228,125	\$ 2,615,265
Net Income	\$ 209,340	\$ 34,809	\$ (38,472)	\$ 5,855	\$ 5,855	\$ 5,855	\$ 35,861	\$ 5,855	\$ 5,855	\$ 20,858	\$ 5,855	\$ 8,666	
Ending Cash	\$ 234,505	\$ 269,314	\$ 230,842	\$ 236,697	\$ 242,552	\$ 248,408	\$ 284,269	\$ 290,124	\$ 295,979	\$ 316,838	\$ 322,693	\$ 331,359	

Charter School Name: Classical Innovations		Fiscal Year: 2016		
Revenue		Planning Year		
Total Revenue From Local Sources (1000)		\$0		
Charter School Startup Grant		\$140,000		
Charter School Revolving Loan		\$220,000		
Total Revenue from State Sources (3000)		\$360,000		
Restricted Federal Through State		\$0		
Total Revenue from Federal Sources (4000)		\$0		
Private Grants & Donations :		\$0		
Source(s) (specify)		\$0		
Loans:				
CoClassical Innovationsmmmercial		\$0		
Contributions and Donations from Private Sources		\$0		
Other (specify)		\$0		
Total Revenue from Other Sources (5000)		\$0		
Total Revenue		\$360,000		
Expenditures		Number	Salary or Cost	Total
--- SALARIES ---				
10.131	Salaries - Teachers			\$0
10.132	Salaries - Substitute Teachers			\$0
10.161	Salaries - Teacher Aides and Paraprofessionals			\$0
10.100	Salaries - Other 1000-INSTRUCTION			\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)			\$0
21.141	Salaries - Attendance and Social Work Personnel			\$0
21.142	Salaries - Guidance Personnel			\$0
21.143	Salaries - Health Services Personnel			\$0
21.144	Salaries - Psychological Personnel			\$0
21.152	Salaries - Secretarial and Clerical			\$0
21.100	Salaries - ACADEMIC DIRECTOR	0.25	\$60,000	\$15,000
	Total 21 (2100)-STUDENT SUPPORT Salaries (100)			\$15,000
22.145	Salaries - Media Personnel - Certified			\$0
22.162	Salaries - Media Personnel - Noncertified			\$0
22.100	Salaries - Other 2200-INSTRUCTIONAL STAFF SUPPORT			\$0
	Total 22 (2200)-INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$0
24.121	Salaries - Principals and Assistants	0.50	\$80,000	\$40,000
24.152	Salaries - Secretarial and Clerical	0.50	\$32,000	\$16,000
24.100	Salaries - Other 2400-SCHOOL ADMINISTRATION			\$0
	Total 24 (2400)-SCHOOL ADMINISTRATION Salaries (100)			\$56,000
26.100	Salaries - Operation & Maintenance of Facilities			\$0
	Total 26 (2600)-OPERATION & MAINT OF FACILITIES Salaries (100)			\$0
31.100	Salaries - FOOD SERVICES			\$0
	Total 31 (3100)-FOOD SERVICES Salaries (100)			\$0
45.100	Salaries - Building Acquisition			\$0
	Total 45 (4500)-BUILDING ACQUISITION Salaries (100)			\$0
	TOTAL - ALL SALARIES (100)			\$71,000
--- BENEFITS ---				
10.210	Retirement - INSTRUCTION	0%		\$0
21.210	Retirement - STUDENT SUPPORT	0%		\$0
22.210	Retirement - INSTRUCTIONAL STAFF SUPPORT	0%		\$0
24.210	Retirement - SCHOOL ADMINISTRATION	0%		\$0
26.210	Retirement - OPERATION & MAINT OF FACILITIES	0%		\$0
31.210	Retirement - FOOD SERVICES	0%		\$0
45.210	Retirement - BUILDING ACQUISITION	0%		\$0
	TOTAL - ALL RETIREMENT			\$0

10.220	Social Security/FICA/UNEMP/WCF - INSTRUCTION	10%		\$0
21.220	Social Security/FICA/UNEMP/WCF - STUDENT SUPPORT	10%		\$1,500
22.220	Social Security/FICA/UNEMP/WCF - INSTRUCTIONAL STAFF SUPPORT	10%		\$0
24.220	Social Security/FICA/UNEMP/WCF - SCHOOL ADMINISTRATION	10%		\$5,600
26.220	Social Security/FICA/UNEMP/WCF - OPERATION & MAINT OF FACIL	10%		\$0
31.220	Social Security - FOOD SERVICES	10%		\$0
45.220	Social Security/FICA/UNEMP/WCF - BUILDING ACQUISITION	10%		\$0
	TOTAL - ALL SOCIAL SECURITY/FICA/UNEMP/WCF			\$7,100
10.240	Insurance (Health/Dental/Life) - INSTRUCTION	11%		\$0
21.240	Insurance (Health/Dental/Life) - STUDENT SUPPORT	11%		\$1,650
22.240	Insurance (Health/Dental/Life) - INSTRUCTIONAL STAFF SUPPORT	11%		\$0
24.240	Insurance (Health/Dental/Life) - SCHOOL ADMINISTRATION	11%		\$6,160
26.240	Insurance (Health/Dental/Life) - OPERATION & MAINT OF FACILITIES	11%		\$0
31.240	Insurance (Health/Dental/Life) - FOOD SERVICES	11%		\$0
45.240	Insurance (Health/Dental/Life) - BUILDING ACQUISITION	11%		\$0
	TOTAL - ALL INSURANCE (Health/Dental/Life)			\$7,810
10.200	Other Benefits (<i>specify</i>) - INSTRUCTION			\$0
21.200	Other Benefits (<i>specify</i>) - STUDENT SUPPORT			\$0
22.200	Other Benefits (<i>specify</i>) - INSTRUCTIONAL STAFF SUPPORT			\$0
24.200	Other Benefits (<i>specify</i>) - SCHOOL ADMINISTRATION			\$0
26.200	Other Benefits (<i>specify</i>) - OPERATION & MAINT OF FACILITIES			\$0
31.200	Other Benefits (<i>specify</i>) - FOOD SERVICES			\$0
45.200	Other Benefits (<i>specify</i>) - BUILDING ACQUISITION			\$0
	TOTAL ALL BENEFITS (200)			\$14,910
	--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---			
10.300	Purchased Prof & Tech Services - INSTRUCTION			
21.300	Purchased Prof & Tech Services - STUDENT SUPPORT			\$15,000
22.300	Purchased Prof & Tech Services - INSTRUCTIONAL STAFF SUPPORT			\$5,000
24.300	Purchased Prof & Tech Services - SCHOOL ADMINISTRATION			\$67,400
26.300	Purchased Prof & Tech Services - OPERATION & MAINT OF FACILITIES			
31.300	Purchased Prof & Tech Services - FOOD SERVICES			
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			\$87,400
	--- PURCHASED PROPERTY SERVICES ---			
26.400	Purchased Property Services			
26.460	Construction and Remodeling			
45.400	Purchased Property Services			\$20,000
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			\$20,000
	--- OTHER PURCHASED SERVICES ---			
26.500	Other Purchased Services - OPERATION & MAINT OF FACILITIES			\$2,000
	TOTAL - ALL OTHER PURCHASED SERVICES (500)			\$2,000
	--- SUPPLIES ---			
10.600	Instructional Supplies - INSTRUCTION			
10.641	Textbooks - INSTRUCTION			\$41,500
21.600	Supplies - STUDENT SUPPORT SERVICES			
22.600	Supplies - INSTRUCTIONAL STAFF SUPPORT			
22.644	Library Books - INSTRUCTIONAL STAFF SUPPORT			
22.650	Periodicals - INSTRUCTIONAL STAFF SUPPORT			
22.660	Audio Visual Materials - INSTRUCTIONAL STAFF SUPPORT			
24.600	Supplies - SCHOOL ADMINISTRATION			\$5,000
26.600	Supplies - OPERATION & MAINT OF FACILITIES			

31.600 Supplies - FOOD SERVICES
31.630 Food - FOOD SERVICES
45.600 Supplies - New Buildings - BUILDING ACQUISITION & INSTR
45.641 Textbooks - New Buildings - BUILDING ACQUISITION & INSTR

45.644	Library Books-New Libraries - BUILDING ACQUISITION & INSTR			
	TOTAL - ALL SUPPLIES (600)			\$46,500
--- PROPERTY ---				
10.700	Property (Instructional Equipment) - INSTRUCTION			\$76,125
21.700	Property - STUDENT SUPPORT SERVICES			
22.700	Property - INSTRUCTIONAL STAFF SUPPORT			\$16,900
24.700	Property - SCHOOL ADMINISTRATION			
26.700	Property - OPERATION & MAINT OF FACILITIES			
31.700	Property - FOOD SERVICES			
31.780	Depreciation - Kitchen Equipment Depreciation - FOOD SERVICES			
45.710	Land and Improvements			
45.720	Buildings			
45.731	Machinery			
45.732	School Buses			
45.733	Furniture and Fixtures			
45.734	Technology Equipment			
45.735	Non-Bus Vehicles			
45.739	Other Equipment			
	TOTAL - ALL PROPERTY (700)			\$93,025
--- OTHER OBJECTS ---				
10.800	Other Objects- INSTRUCTION			
21.800	Other Objects- STUDENT SUPPORT SERVICES			
22.800	Other Objects- INSTRUCTIONAL STAFF SUPPORT			
24.800	Other Objects- SCHOOL ADMINISTRATION			
26.800	Other Objects - OPERATION & MAINT OF FACILITIES			
31.800	Other Objects - FOOD SERVICES			
45.800	Other Objects - BUILDING ACQUISITION & INSTR			
	TOTAL - ALL OTHER OBJECTS			
10.810	Dues and Fees - INSTRUCTION			
21.810	Dues and Fees - STUDENT SUPPORT SERVICES			
22.810	Dues and Fees - INSTRUCTIONAL STAFF SUPPORT			
24.810	Dues and Fees -SCHOOL ADMINISTRATION			
26.810	Dues and Fees - OPERATION & MAINT OF FACILITIES			
	TOTAL - ALL DUES AND FEES			
	TOTAL - OTHER OBJECTS (800)			\$0
1000	Total Local			\$0
3000	Total State			\$360,000
4000	Total Federal			\$0
TOTAL REVENUES				\$360,000
100	Salaries			\$71,000
200	Employee Benefits			\$14,910
300	Purchased Professional and Technical Services			\$87,400
400	Purchased Property Services			\$20,000
500	Other Purchased Services			\$2,000
600	Supplies			\$46,500
700	Property			\$93,025
800	Other Objects			\$0

TOTAL EXPENDITURES	\$334,835
Excess or Deficiency of Revenues over Expenditures	\$25,165
Other Sources of Funding (5000)	\$0
Net Asset Balance (Fund Balance)	\$25,165
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)	7%
Percentage of Funding Contributed to Reserve Balance (Total Rev - Total Exp / Total Rev = >5%)	7%
Necessary Closure Fund (2 months Purchased Prop Serv + Other)	\$3,333

Charter School Name: Classical Innovations	Fiscal Year: 2017	
First Operational Year:	100% Enrollment	75% Enrollment
Number of Students:	415	312
Grade Configuration:		
Revenue		
Child Nutrition Program (CNP) and Lunchroom Sales	\$102,713	\$77,220
Student Activities	\$20,750	\$15,600
Other	\$57,063	\$42,900
Total Revenue From Local Sources (1000)	\$180,525	\$135,720
State Educational Funding	\$2,558,015	\$1,951,427
Implementation Grant	\$100,000	\$100,000
Total Revenue from State Sources (3000)	\$2,658,015	\$2,051,427
Lunch and Breakfast Reimbursement	\$64,242	\$48,298
Donated Commodities (CNP)	\$0	\$0
Restricted Federal Through State	\$0	\$0
Programs for the Disabled (IDEA)	\$41,000	\$30,750
No Child Left Behind (NCLB)	\$19,012	\$14,259
Total Revenue from Federal Sources (4000)	\$124,254	\$93,307
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
Prior Year Carryforward	\$25,165	\$25,165
Total Revenue from Other Sources (5000)	\$25,165	\$25,165
Total Revenue	\$2,987,959	\$2,305,618

Expenditures	Number	Salary or Cost	Total	Number	Salary or Cost	Total
--- SALARIES ---						
10.131 Salaries - Teachers	21.75	\$40,000	\$870,000	16.00	\$38,000	\$608,000
10.132 Salaries - Substitute Teachers	108.75	\$100	\$10,875	80.00	\$100	\$8,000
10.161 Salaries - Teacher Aides and Paraprofessionals	21.00	\$8,910	\$187,110	15.00	\$8,100	\$121,500
10.100 Salaries - Other 1000-INSTRUCTION			\$0			\$0
Total 10 (1000)-INSTRUCTION Salaries (100)			\$1,067,985			\$737,500
21.141 Salaries - Attendance and Social Work Personnel	0.50	\$32,000	\$16,000	0.50	\$32,000	\$16,000
21.142 Salaries - Guidance Personnel	1.50	\$40,000	\$60,000	1.00	\$40,000	\$40,000
21.143 Salaries - Health Services Personnel			\$0			\$0
21.144 Salaries - Psychological Personnel			\$0			\$0
21.152 Salaries - Secretarial and Clerical			\$0			\$0
21.100 Salaries - Other 2100-STUDENT SUPPORT			\$0			\$0
Total 21 (2100)-STUDENT SUPPORT Salaries (100)			\$76,000			\$56,000
22.145 Salaries - Media Personnel - Certified	0.75	\$40,000	\$30,000	0.50	\$38,000	\$19,000
22.162 Salaries - Media Personnel - Noncertified			\$0			\$0
22.100 Salaries - Other 2200-INSTRUCTIONAL STAFF SUPPORT			\$0			\$0
Total 22 (2200)-INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$30,000			\$19,000
24.121 Salaries - Principals and Assistants	2.00	\$75,000	\$150,000	1.50	\$75,000	\$112,500
24.152 Salaries - Secretarial and Clerical	2.00	\$32,000	\$64,000	2.00	\$32,000	\$64,000
24.100 Salaries - Other 2400-Business Administrator			\$0			\$0
Total 24 (2400)-SCHOOL ADMINISTRATION Salaries (100)			\$214,000			\$176,500
26.100 Salaries - Operation & Maintenance of Facilities	4.00	\$18,000	\$72,000	3.00	\$16,000	\$48,000
Total 26 (2600)-OPERATION & MAINT OF FACILITIES Salaries (100)			\$72,000			\$48,000
31.100 Salaries - FOOD SERVICES			\$0			\$0
Total 31 (3100)-FOOD SERVICES Salaries (100)			\$0			\$0
45.100 Salaries - Building Acquisition			\$0			\$0
Total 45 (4500)-BUILDING ACQUISITION Salaries (100)			\$0			\$0
TOTAL - ALL SALARIES (100)			\$1,459,985			\$1,037,000
--- BENEFITS ---						
10.210 Retirement - INSTRUCTION	4%		\$42,719	3%		\$22,125
21.210 Retirement - STUDENT SUPPORT	4%		\$3,040	3%		\$1,680
22.210 Retirement - INSTRUCTIONAL STAFF SUPPORT	4%		\$1,200	3%		\$570
24.210 Retirement - SCHOOL ADMINISTRATION	4%		\$8,560	3%		\$5,295
26.210 Retirement - OPERATION & MAINT OF FACILITIES	4%		\$2,880	3%		\$1,440

31.210	Retirement - FOOD SERVICES	4%		\$0	3%		\$0
45.210	Retirement - BUILDING ACQUISITION	4%		\$0	3%		\$0
	TOTAL - ALL RETIREMENT			\$58,399			\$31,110
10.220	Social Security/FICA/UNEMP/WCF - INSTRUCTION	10%		\$106,799	10%		\$73,750
21.220	Social Security/FICA/UNEMP/WCF - STUDENT SUPPORT	10%		\$7,600	10%		\$5,600
22.220	Social Security/FICA/UNEMP/WCF - INSTRUCTIONAL STAFF SUPP	10%		\$3,000	10%		\$1,900
24.220	Social Security/FICA/UNEMP/WCF -SCHOOL ADMINISTRATION	10%		\$21,400	10%		\$17,650
26.220	Social Security/FICA/UNEMP/WCF - OPERATION & MAINT OF FACI	10%		\$7,200	10%		\$4,800
31.220	Social Security - FOOD SERVICES	10%		\$0	10%		\$0
45.220	Social Security/FICA/UNEMP/WCF - BUILDING ACQUISITION	10%		\$0	10%		\$0
	TOTAL - ALL SOCIAL SECURITY/FICA/UNEMP/WCF			\$145,999			\$103,700
10.240	Insurance (Health/Dental/Life) - INSTRUCTION	11%		\$95,700	11%		\$66,880
21.240	Insurance (Health/Dental/Life) - STUDENT SUPPORT	11%		\$8,360	11%		\$6,160
22.240	Insurance (Health/Dental/Life) - INSTRUCTIONAL STAFF SUPPORT	11%		\$3,300	11%		\$2,090
24.240	Insurance (Health/Dental/Life) - SCHOOL ADMINISTRATION	11%		\$23,540	11%		\$19,415
26.240	Insurance (Health/Dental/Life) - OPERATION & MAINT OF FACILITIE	11%		\$7,920	11%		\$5,280
31.240	Insurance (Health/Dental/Life) - FOOD SERVICES	11%		\$0	11%		\$0
45.240	Insurance (Health/Dental/Life) - BUILDING ACQUISITION	11%		\$0	11%		\$0
	TOTAL - ALL INSURANCE (Health/Dental/Life)			\$138,820			\$99,825
10.200	Other Benefits (<i>specify</i>) - INSTRUCTION			\$0			\$0
21.200	Other Benefits (<i>specify</i>) - STUDENT SUPPORT			\$0			\$0
22.200	Other Benefits (<i>specify</i>) - INSTRUCTIONAL STAFF SUPPORT			\$0			\$0
24.200	Other Benefits (<i>specify</i>) - SCHOOL ADMINISTRATION			\$0			\$0
26.200	Other Benefits (<i>specify</i>) - OPERATION & MAINT OF FACILITIES			\$0			\$0
31.200	Other Benefits (<i>specify</i>) - FOOD SERVICES			\$0			\$0
45.200	Other Benefits (<i>specify</i>) - BUILDING ACQUISITION			\$0			\$0
	TOTAL - ALL OTHER BENEFITS (<i>specify</i>)			\$0			
				\$0 TOTAL ALL BENEFITS (200)	24%		
				\$343,218	23%	\$234,635	
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---							
10.300	Purchased Prof & Tech Services - INSTRUCTION			\$20,000			\$15,000
21.300	Purchased Prof & Tech Services - STUDENT SUPPORT			\$20,000			\$15,000
22.300	Purchased Prof & Tech Services - INSTRUCTIONAL STAFF SUPPORT						
24.300	Purchased Prof & Tech Services - SCHOOL ADMINISTRATION			\$125,000			\$89,000
26.300	Purchased Prof & Tech Services - OPERATION & MAINT OF FACILITIES						
31.300	Purchased Prof & Tech Services - FOOD SERVICES			\$158,607			\$123,103
45.300	Purchased Prof & Tech Services - BUILDING ACQUISITION						
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			\$323,607			\$242,103
--- PURCHASED PROPERTY SERVICES ---							
26.400	Facility Lease and Property Tax			\$417,144			\$417,144
26.460	Construction and Remodeling						
45.400	Purchased Property Services			\$10,000			\$10,000
45.460	Construction and Remodeling						
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			\$427,144			\$427,144
--- OTHER PURCHASED SERVICES ---							
26.500	Other Purchased Services - OPERATION & MAINT OF FACILITIES			\$15,000			\$15,000
21.500	Other Purchased Services - ADVERTISING			\$10,000			\$15,000
	TOTAL - ALL OTHER PURCHASED SERVICES (500)			\$25,000			\$30,000
--- SUPPLIES ---							
10.600	Instructional Supplies - INSTRUCTION			\$8,300			\$6,240
10.641	Textbooks - INSTRUCTION			\$31,125			\$23,400
21.600	Supplies - STUDENT SUPPORT			\$0			\$0
22.600	Supplies - INSTRUCTIONAL STAFF SUPPORT			\$2,500			\$1,875
22.644	Library Books - INSTRUCTIONAL STAFF SUPPORT			\$10,375			\$5,188
22.650	Periodicals - INSTRUCTIONAL STAFF SUPPORT						
22.660	Audio Visual Materials - INSTRUCTIONAL STAFF SUPPORT						
24.600	Supplies - SCHOOL ADMINISTRATION			\$6,225			\$4,669
26.600	Supplies - OPERATION & MAINT OF FACILITIES			\$50,375			\$40,300
31.600	Supplies - FOOD SERVICES						
31.630	Food - FOOD SERVICES						
45.600	Supplies - New Buildings - BUILDING ACQUISITION & INSTR						
45.641	Textbooks - New Buildings - BUILDING ACQUISITION & INSTR						
45.644	Library Books-New Libraries - BUILDING ACQUISITION & INSTR						
	TOTAL - ALL SUPPLIES (600)			\$108,900			\$81,671
--- PROPERTY ---							
10.700	Property (Instructional Equipment) - INSTRUCTION			\$53,950			\$40,463
21.700	Property - STUDENT SUPPORT SERVICES						
22.700	Property - INSTRUCTIONAL STAFF SUPPORT						
24.700	Property - SCHOOL ADMINISTRATION			\$8,000			\$6,000
26.700	Property - OPERATION & MAINT OF FACILITIES			\$5,000			\$3,750
31.700	Property - FOOD SERVICES						
31.780	Depreciation - Kitchen Equipment Depreciation - FOOD SERVICES						
45.710	Land and Improvements						

45.720	Buildings					
45.731	Machinery					
45.732	School Buses					
45.733	Furniture and Fixtures					
45.734	Technology Equipment					
45.735	Non-Bus Vehicles					
45.739	Other Equipment					
TOTAL - ALL PROPERTY (700)			\$66,950			\$50,213
--- OTHER OBJECTS ---						
10.800	Other Objects- INSTRUCTION		\$1,000			\$750
21.800	Other Objects- STUDENT SUPPORT SERVICES					
22.800	Other Objects- INSTRUCTIONAL STAFF SUPPORT					
24.800	Other Objects- LOAN PAYMENT		\$57,200			\$57,200
26.800	Other Objects - OPERATION & MAINT OF FACILITIES		\$3,000			\$2,250
31.800	Other Objects - FOOD SERVICES					
45.800	Other Objects - BUILDING ACQUISITION & INSTR					
TOTAL - ALL OTHER OBJECTS						
10.810	Dues and Fees - INSTRUCTION					
21.810	Dues and Fees - STUDENT SUPPORT SERVICES					
22.810	Dues and Fees - INSTRUCTIONAL STAFF SUPPORT					
24.810	Dues and Fees -SCHOOL ADMINISTRATION		\$5,000			\$3,750
26.810	Dues and Fees - OPERATION & MAINT OF FACILITIES					
	TOTAL - ALL DUES AND FEES					
	TOTAL - OTHER OBJECTS (800)		\$66,200			\$63,950
Total Building Acquisition & Instruction (4500)			\$70,200			\$66,950
830	Interest		\$0			\$0
840	Reserve Fund of Principal		\$0			\$0
Total other financing sources (uses) and other items			\$0			\$0
1000	Total Local		\$180,525			\$135,720
3000	Total State		\$2,658,015			\$2,051,427
4000	Total Federal		\$124,254			\$93,307
TOTAL REVENUES			\$2,962,794			\$2,280,453
100	Salaries		\$1,459,985			\$1,037,000
200	Employee Benefits		\$343,218			\$234,635
300	Purchased Professional and Technical Services		\$323,607			\$242,103
400	Purchased Property Services		\$427,144			\$427,144
500	Other Purchased Services		\$25,000			\$30,000
600	Supplies		\$108,900			\$81,671
700	Property		\$66,950			\$50,213
800	Other Objects		\$66,200			\$63,950
TOTAL EXPENDITURES			\$2,821,003			\$2,166,715
Excess or Deficiency of Revenue over Expenditures			\$141,791			\$113,738
Other Sources of Funding (5000)			\$25,165			\$25,165
Net Asset Balance (Fund Balance)			\$166,956			\$138,903
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)			6%			6%
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)			5%			5%
Necessary Closure Fund (2 months Purch Prop Serv + Other)			\$82,224			\$81,849

Charter School Name: Classical Innovations		Fiscal Year: 2018					
First Operational Year		100% Enrollment			75% Enrollment		
Number of Students:		415			312		
Grade Configuration:							
Revenue							
Child Nutrition Program (CNP) and Lunchroom Sales		\$102,713			\$77,034		
Student Activities		\$20,750			\$15,563		
Other		\$57,063			\$42,797		
Total Revenue From Local Sources (1000)		\$180,525			\$135,394		
State Educational Funding		\$2,602,939			\$1,955,392		
Implementation Grant		\$80,000			\$80,000		
Total Revenue from State Sources (3000)		\$2,682,939			\$2,035,392		
Lunch and Breakfast Reimbursement		\$64,242			\$48,182		
Donated Commodities (CNP)		\$0			\$0		
Restricted Federal Through State		\$0			\$0		
Programs for the Disabled (IDEA)		\$42,230			\$31,673		
No Child Left Behind (NCLB)		\$19,582			\$14,687		
Total Revenue from Federal Sources (4000)		\$126,054			\$94,541		
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		
Prior Year Carryforward		\$166,956			\$138,903		
Total Revenue from Other Sources (5000)		\$166,956			\$138,903		
Total Revenue		\$3,156,474			\$2,404,230		
Expenditures		Number	Salary or Cost	Total	Number	Salary or Cost	Total
--- SALARIES ---							
10.131	Salaries - Teachers	21.75	\$41,000	\$891,750	16.00	\$38,000	\$608,000
10.132	Salaries - Substitute Teachers	108.75	\$100	\$10,875	80.00	\$100	\$8,000
10.161	Salaries - Teacher Aides and Paraprofessionals	21.00	\$9,177	\$192,723	15.00	\$8,100	\$121,500
10.100	Salaries - Other 1000-INSTRUCTION			\$0			\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)			\$1,095,348			\$737,500
21.141	Salaries - Attendance and Social Work Personnel	0.50	\$32,960	\$16,480			\$0
21.142	Salaries - Guidance Personnel	1.50	\$41,200	\$61,800	1.00	\$41,200	\$41,200
21.143	Salaries - Health Services Personnel			\$0			\$0
21.144	Salaries - Psychological Personnel			\$0			\$0
21.152	Salaries - Secretarial and Clerical			\$0			\$0
21.100	Salaries - Other 2100-STUDENT SUPPORT			\$0			\$0
	Total 21 (2100)-STUDENT SUPPORT Salaries (100)			\$78,280			\$41,200
22.145	Salaries - Media Personnel - Certified	0.75	\$41,200	\$30,900	0.50	\$39,140	\$19,570
22.162	Salaries - Media Personnel - Noncertified			\$0			\$0
22.100	Salaries - Other 2200-INSTRUCTIONAL STAFF SUPPORT			\$0			\$0
	Total 22 (2200)-INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$30,900			\$19,570
24.121	Salaries - Principals and Assistants	2.00	\$77,250	\$154,500	1.50	\$77,250	\$115,875
24.152	Salaries - Secretarial and Clerical	2.00	\$32,960	\$65,920	1.50	\$32,960	\$49,440
24.100	Salaries - Other 2400-Business Administrator			\$0			\$0
	Total 24 (2400)-SCHOOL ADMINISTRATION Salaries (100)			\$220,420			\$165,315
26.100	Salaries - Operation & Maintenance of Facilities	5.00	\$18,540	\$92,700	4.00	\$16,480	\$65,920
	Total 26 (2600)-OPERATION & MAINT OF FACILITIES Salaries (100)			\$92,700			\$65,920
31.100	Salaries - FOOD SERVICES			\$0			\$0
	Total 31 (3100)-FOOD SERVICES Salaries (100)			\$0			\$0
45.100	Salaries - Building Acquisition			\$0			\$0
	Total 45 (4500)-BUILDING ACQUISITION Salaries (100)			\$0			\$0
	TOTAL - ALL SALARIES (100)			\$1,517,648			\$1,029,505
--- BENEFITS ---							
10.210	Retirement - INSTRUCTION	4%		\$35,670	3%		\$18,240
21.210	Retirement - STUDENT SUPPORT	4%		\$3,131	3%		\$1,236
22.210	Retirement - INSTRUCTIONAL STAFF SUPPORT	4%		\$1,236	3%		\$587
24.210	Retirement - SCHOOL ADMINISTRATION	4%		\$8,817	3%		\$4,959
26.210	Retirement - OPERATION & MAINT OF FACILITIES	2%		\$1,854	3%		\$1,978
31.210	Retirement - FOOD SERVICES	4%		\$0	3%		\$0
45.210	Retirement - BUILDING ACQUISITION	4%		\$0	3%		\$0
	TOTAL - ALL RETIREMENT			\$50,708			\$27,000
10.220	Social Security/FICA/UNEMP/WCF - INSTRUCTION	10%		\$86,053.9	10%		\$71,169
21.220	Social Security/FICA/UNEMP/WCF - STUDENT SUPPORT	10%		\$7,554	10%		\$3,976
22.220	Social Security/FICA/UNEMP/WCF - INSTRUCTIONAL STAFF SUPP	10%		\$2,982	10%		\$1,889
24.220	Social Security/FICA/UNEMP/WCF -SCHOOL ADMINISTRATION	10%		\$21,271	10%		\$15,953
26.220	Social Security/FICA/UNEMP/WCF - OPERATION & MAINT OF FACI	10%		\$8,946	10%		\$6,361
31.220	Social Security - FOOD SERVICES	10%		\$0	10%		\$0
45.220	Social Security/FICA/UNEMP/WCF - BUILDING ACQUISITION	10%		\$0	10%		\$0
	TOTAL - ALL SOCIAL SECURITY/FICA/UNEMP/WCF			\$126,806			\$99,347

10.240	Insurance (Health/Dental/Life) - INSTRUCTION	11%		\$98,093	11%		\$63,840
21.240	Insurance (Health/Dental/Life) - STUDENT SUPPORT	11%		\$8,611	11%		\$4,326
22.240	Insurance (Health/Dental/Life) - INSTRUCTIONAL STAFF SUPPORT	11%		\$3,399	11%		\$2,055
24.240	Insurance (Health/Dental/Life) - SCHOOL ADMINISTRATION	11%		\$24,246	11%		\$17,358
26.240	Insurance (Health/Dental/Life) - OPERATION & MAINT OF FACILITIE	11%		\$10,197	11%		\$6,922
31.240	Insurance (Health/Dental/Life) - FOOD SERVICES	11%		\$0	11%		\$0
45.240	Insurance (Health/Dental/Life) - BUILDING ACQUISITION	11%		\$0	11%		\$0
	TOTAL - ALL INSURANCE (Health/Dental/Life)			\$144,546			\$94,501
10.200	Other Benefits (<i>specify</i>) - INSTRUCTION			\$0			\$0
21.200	Other Benefits (<i>specify</i>) - STUDENT SUPPORT			\$0			\$0
22.200	Other Benefits (<i>specify</i>) - INSTRUCTIONAL STAFF SUPPORT			\$0			\$0
24.200	Other Benefits (<i>specify</i>) - SCHOOL ADMINISTRATION			\$0			\$0
26.200	Other Benefits (<i>specify</i>) - OPERATION & MAINT OF FACILITIES			\$0			\$0
31.200	Other Benefits (<i>specify</i>) - FOOD SERVICES			\$0			\$0
45.200	Other Benefits (<i>specify</i>) - BUILDING ACQUISITION			\$0			\$0
	TOTAL - ALL OTHER BENEFITS (<i>specify</i>)			\$0			\$0
	TOTAL ALL BENEFITS (200)			\$322,059			\$220,848
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---							
10.300	Purchased Prof & Tech Services - INSTRUCTION			\$10,000			\$7,500
21.300	Purchased Prof & Tech Services - STUDENT SUPPORT			\$20,000			\$15,000
22.300	Purchased Prof & Tech Services - INSTRUCTIONAL STAFF SUPPORT						
24.300	Purchased Prof & Tech Services - SCHOOL ADMINISTRATION			\$128,750			\$89,000
26.300	Purchased Prof & Tech Services - OPERATION & MAINT OF FACILITIES						
31.300	Purchased Prof & Tech Services - FOOD SERVICES			\$158,607			\$118,955
45.300	Purchased Prof & Tech Services - BUILDING ACQUISITION						
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			\$317,357			\$230,455
--- PURCHASED PROPERTY SERVICES ---							
26.400	Facility Lease and Property Tax			\$533,858			\$533,858
26.460	Construction and Remodeling						
45.400	Purchased Property Services			\$5,000			\$5,000
45.460	Construction and Remodeling						
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			\$538,858			\$538,858
--- OTHER PURCHASED SERVICES ---							
26.500	Other Purchased Services - OPERATION & MAINT OF FACILITIES			\$15,000			\$15,000
21.500	Other Purchased Services - ADVERTISING			\$5,000			\$10,000
	TOTAL - ALL OTHER PURCHASED SERVICES (500)			\$20,000			\$25,000
--- SUPPLIES ---							
10.600	Instructional Supplies - INSTRUCTION			\$8,300			\$6,225
10.641	Textbooks - INSTRUCTION			\$7,781			\$3,891
21.600	Supplies - STUDENT SUPPORT			\$2,333			\$0
22.600	Supplies - INSTRUCTIONAL STAFF SUPPORT			\$1,000			\$750
22.644	Library Books - INSTRUCTIONAL STAFF SUPPORT			\$2,075			\$1,038
22.650	Periodicals - INSTRUCTIONAL STAFF SUPPORT						
22.660	Audio Visual Materials - INSTRUCTIONAL STAFF SUPPORT						
24.600	Supplies - SCHOOL ADMINISTRATION			\$6,225			\$4,669
26.600	Supplies - OPERATION & MAINT OF FACILITIES			\$46,375			\$34,781
31.600	Supplies - FOOD SERVICES						
31.630	Food - FOOD SERVICES						
45.600	Supplies - New Buildings - BUILDING ACQUISITION & INSTR						
45.641	Textbooks - New Buildings - BUILDING ACQUISITION & INSTR						
45.644	Library Books-New Libraries - BUILDING ACQUISITION & INSTR						
	TOTAL - ALL SUPPLIES (600)			\$74,089			\$51,353
--- PROPERTY ---							
10.700	Property (Instructional Equipment) - INSTRUCTION			\$5,000			\$2,500
21.700	Property - STUDENT SUPPORT SERVICES						
22.700	Property - INSTRUCTIONAL STAFF SUPPORT						
24.700	Property - SCHOOL ADMINISTRATION			\$2,500			\$1,250
26.700	Property - OPERATION & MAINT OF FACILITIES			\$2,500			\$1,875
31.700	Property - FOOD SERVICES						
31.780	Depreciation - Kitchen Equipment Depreciation - FOOD SERVICES						
45.710	Land and Improvements						
45.720	Buildings						
45.731	Machinery						
45.732	School Buses						
45.733	Furniture and Fixtures						
45.734	Technology Equipment						
45.735	Non-Bus Vehicles						
45.739	Other Equipment						
	TOTAL - ALL PROPERTY (700)			\$10,000			\$5,625
--- OTHER OBJECTS ---							
10.800	Other Objects- INSTRUCTION			\$1,000			\$750
21.800	Other Objects- STUDENT SUPPORT SERVICES						
22.800	Other Objects- INSTRUCTIONAL STAFF SUPPORT						

24.800	Other Objects- LOAN PAYMENT			\$57,200		\$57,200
26.800	Other Objects - OPERATION & MAINT OF FACILITIES			\$5,000		\$1,000
31.800	Other Objects - FOOD SERVICES					
45.800	Other Objects - BUILDING ACQUISITION & INSTR					
	TOTAL - ALL OTHER OBJECTS					
10.810	Dues and Fees - INSTRUCTION					
21.810	Dues and Fees - STUDENT SUPPORT SERVICES					
22.810	Dues and Fees - INSTRUCTIONAL STAFF SUPPORT					
24.810	Dues and Fees -SCHOOL ADMINISTRATION			\$5,000		\$3,750
26.810	Dues and Fees - OPERATION & MAINT OF FACILITIES					
	TOTAL - ALL DUES AND FEES					
	TOTAL - OTHER OBJECTS (800)			\$68,200		\$62,700
Total Building Acquisition & Instruction (4500)				\$74,200		\$64,450
830	Interest			\$0		\$0
840	Redemption of Principal			\$0		\$0
Total other financing sources (uses) and other items				\$0		\$0
1000	Total Local			\$180,525		\$135,394
3000	Total State			\$2,682,939		\$2,035,392
4000	Total Federal			\$126,054		\$94,541
TOTAL REVENUES				\$2,989,518		\$2,265,327
100	Salaries			\$1,517,648		\$1,029,505
200	Employee Benefits			\$322,059		\$220,848
300	Purchased Professional and Technical Services			\$317,357		\$230,455
400	Purchased Property Services			\$538,858		\$538,858
500	Other Purchased Services			\$20,000		\$25,000
600	Supplies			\$74,089		\$51,353
700	Property			\$10,000		\$5,625
800	Other Objects			\$68,200		\$62,700
TOTAL EXPENDITURES				\$2,868,211		\$2,164,344
Excess or Deficiency of Revenues over Expenditures				\$121,307		\$100,982
Other Sources of Funding (5000)				\$166,956		\$138,903
Net Asset Balance (Fund Balance)				\$288,263		\$239,885
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)				10%		11%
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)				4%		4%
Necessary Closure Fund (2 months Purch Prop Serv + Other)				\$101,176		\$100,260

CHARTER SCHOOL WORKSHEET

FY 2013-2014

*****PROJECTION ONLY*****

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	0	0.55	0
Estimated ADM (1-3)	0	0.9	0
Estimated ADM (4-6)	0	0.9	0
Estimated ADM (7-8)	150	0.99	148.5
Estimated ADM (9-12)	265	1.2	318
Special Ed Pre-School	0		
Special Ed ADM (K)	0		
Special Ed ADM (1-12)	41.5		
Special Ed (Self-Contained)	2		
Number of Teachers (K-6)	0		
Number of Teachers (7-12)	20.75		
WPU Value	\$2,986	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	21.75		
School Administrators (CACTUS)	2		
Prior Year WPUs	466.5		
Low Income Students-prior year	116.625		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	466.5000	\$ 1,392,955
Professional Staff	0.05700	26.5905	79,398
Restricted Basic School:			
Special Ed--Add-on	1.0000	43.5000	115,667
Spec. Ed. Self-Contained	1.0000	2.0000	5,972
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		37,602
Total WPU Programs		538.5905	\$ 1,631,594
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 20,267
Special Populations			
Enhancement for At-Risk Students	\$35.36 per student		14,674
Enhancement for Accelerated Studen	\$6.65 per student		2,760
Other			
School Land Trust Program	\$41 per student		19,127
Reading Achievement Program	\$15.33 per student-Guarantee Program		-
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		41,500
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		113,426
ESA-School Administrators	\$3,104 per qualified administrator		6,208
Library Books and Resources	\$0.98616 per student	417	411
Local Replacement Dollars	Average \$1,689 per student		704,313
Total Non-WPU			\$ 922,686
One Time			
Teacher Materials/Supplies ^{1, 2}	\$180 per eligible F.T.E.	0	-
		20.75	3,735
Total One Time			\$ 3,735

ESTIMATED Total All State Funding		\$ 2,558,015
¹ Steps one through three get \$250; steps four or higher get \$175		
² Steps one through three get \$200; steps four or higher get \$150		
Questions: Call Cathy Dudley @ 538-7667		<i>Updated 04-09-13</i>

CHARTER SCHOOL WORKSHEET

FY 2013-2014

*****PROJECTION ONLY*****

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	0	0.55	0
Estimated ADM (1-3)	0	0.9	0
Estimated ADM (4-6)	0	0.9	0
Estimated ADM (7-8)	113	0.99	111.87
Estimated ADM (9-12)	199	1.2	238.8
Special Ed Pre-School	0		
Special Ed ADM (K)	0		
Special Ed ADM (1-12)	41.5		
Special Ed (Self-Contained)	1		
Number of Teachers (K-6)	0		
Number of Teachers (7-12)	15		
WPU Value	\$2,986	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	16		
School Administrators (CACTUS)	2		
Prior Year WPUs	350.67		
Low Income Students-prior year	87.6675		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	350.6700	\$ 1,047,090
Professional Staff	0.05700	19.9882	59,684
Restricted Basic School:			
Special Ed--Add-on	1.0000	42.5000	113,008
Spec. Ed. Self-Contained	1.0000	1.0000	2,986
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		28,327
Total WPU Programs		414.1582	\$ 1,251,095
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 15,585
Special Populations			
Enhancement for At-Risk Students	\$35.36 per student		11,032
Enhancement for Accelerated Student	\$6.65 per student		2,075
Other			
School Land Trust Program	\$41 per student		19,127
Reading Achievement Program	\$15.33 per student-Guarantee Program		-
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		31,200
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		83,440
ESA-School Administrators	\$3,104 per qualified administrator		6,208
Library Books and Resources	\$0.98616 per student	313	309
Local Replacement Dollars	Average \$1,689 per student		528,657
Total Non-WPU			\$ 697,632
One Time			
Teacher Materials/Supplies ^{1, 2}	\$180 per eligible F.T.E.	0	-
		15	2,700
Total One Time			\$ 2,700
ESTIMATED Total All State Funding			
			\$ 1,951,427

¹Steps one through three get \$250; steps four or higher get \$175

²Steps one through three get \$200; steps four or higher get \$150

Questions: Call Cathy Dudley @ 538-7667

Updated 04-09-13

CHARTER SCHOOL WORKSHEET

FY 2013-2014

*****PROJECTION ONLY*****

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	0	0.55	0
Estimated ADM (1-3)	0	0.9	0
Estimated ADM (4-6)	0	0.9	0
Estimated ADM (7-8)	150	0.99	148.5
Estimated ADM (9-12)	265	1.2	318
Special Ed Pre-School	0		
Special Ed ADM (K)	0		
Special Ed ADM (1-12)	41.5		
Special Ed (Self-Contained)	2		
Number of Teachers (K-6)	0		
Number of Teachers (7-12)	20.75		
WPU Value	\$3,076	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	21.75		
School Administrators (CACTUS)	2		
Prior Year WPUs	443.175		
Low Income Students-prior year	116.625		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	466.5000	\$ 1,434,744
Professional Staff	0.05700	26.5905	81,780
Restricted Basic School:			
Special Ed--Add-on	1.0000	43.5000	115,667
Spec. Ed. Self-Contained	1.0000	2.0000	6,151
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		37,602
Total WPU Programs		538.5905	\$ 1,675,944
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 20,267
Special Populations			
Enhancement for At-Risk Students	\$35.36 per student		14,674
Enhancement for Accelerated Student	\$6.65 per student		2,760
Other			
School Land Trust Program	\$41 per student		19,700
Reading Achievement Program	\$15.33 per student-Guarantee Program		-
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		41,500
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		113,426
ESA-School Administrators	\$3,104 per qualified administrator		6,208
Library Books and Resources	\$0.98616 per student	417	411
Local Replacement Dollars	Average \$1,689 per student		704,313
Total Non-WPU			\$ 923,260
One Time			
Teacher Materials/Supplies ^{1, 2}	\$180 per eligible F.T.E.	0	-
		20.75	3,735
Total One Time			\$ 3,735
ESTIMATED Total All State Funding			
			\$ 2,602,939

¹Steps one through three get \$250; steps four or higher get \$175

²Steps one through three get \$200; steps four or higher get \$150

Questions: Call Cathy Dudley @ 538-7667

Updated 04-09-13

CHARTER SCHOOL WORKSHEET

FY 2013-2014

*****PROJECTION ONLY*****

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	0	0.55	0
Estimated ADM (1-3)	0	0.9	0
Estimated ADM (4-6)	0	0.9	0
Estimated ADM (7-8)	113	0.99	111.87
Estimated ADM (9-12)	199	1.2	238.8
Special Ed Pre-School	0		
Special Ed ADM (K)	0		
Special Ed ADM (1-12)	31.2		
Special Ed (Self-Contained)	1		
Number of Teachers (K-6)	0		
Number of Teachers (7-12)	15		
WPU Value	\$3,076	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	16		
School Administrators (CACTUS)	1.5		
Prior Year WPUs	350.67		
Low Income Students-prior year	87.6675		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	350.6700	\$ 1,078,503
Professional Staff	0.05700	19.9882	61,475
Restricted Basic School:			
Special Ed--Add-on	1.0000	32.2000	85,620
Spec. Ed. Self-Contained	1.0000	1.0000	3,076
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		28,327
Total WPU Programs		403.8582	\$ 1,257,000
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 15,197
Special Populations			
Enhancement for At-Risk Students	\$35.36 per student		11,032
Enhancement for Accelerated Studen	\$6.65 per student		2,075
Other			
School Land Trust Program	\$41 per student		19,127
Reading Achievement Program	\$15.33 per student-Guarantee Program		-
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		31,200
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		83,440
ESA-School Administrators	\$3,104 per qualified administrator		4,656
Library Books and Resources	\$0.98616 per student	313	309
Local Replacement Dollars	Average \$1,689 per student		528,657
Total Non-WPU			\$ 695,692
One Time			
Teacher Materials/Supplies ^{1, 2}	\$180 per eligible F.T.E.	0	-
		15	2,700

Total One Time			\$ 2,700
ESTIMATED Total All State Funding		\$ 1,955,392	
¹ Steps one through three get \$250; steps four or higher get \$175			
² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Cathy Dudley @ 538-7667			Updated 04-09-13