

Amendment Request – John Hancock Charter School



# State Charter School Board

## Amendment Request

250 East 500 South, P.O. 144200, Salt Lake City, UT 84042  
[www.UtahSCSB.org](http://www.UtahSCSB.org)

(801) 538-7720

### Applicant Assurances

School Name: John Hancock Charter School

The Applicant certifies all information contained in this application is complete and accurate, realizing that any misrepresentation could result in disqualification from the Amendment Request process or revocation after award.

The Applicant understands that applications must be uploaded into the UCAP system no later than the third Friday of the month preceding the month of the requested SCSB meeting and that incomplete applications will not be considered.

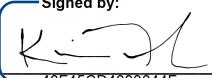
The Applicant acknowledges that all information presented in the application package, if approved, may become part of the charter to be used for accountability purposes throughout the term of the charter.

The Applicant acknowledges that the charter school governing board is subject to all Utah statutes regarding charter schools as well as all relevant federal, state and local laws, and requirements, and should comply such.

The Applicant acknowledges that the most current academic and compliance data will be provided to the SCSB for its consideration of the application.

The applicant acknowledges that prior to inclusion on the agenda, the SCSB recommends charter school governing boards schedule an appointment with SCSB staff to discuss the request and provide clarification to any staff questions.

Kim Frank  
Name of Board Chair

Signed by:  
  
48F45CD4093644F...  
10/16/2024  
Signature of Board Chair /Date

## Amendment Request – John Hancock Charter School

**School Entity Information**Name of School: **John Hancock Charter School**Name of School Administrator: **Julie Adamic**Contact Information for School: [julie@johnhancockcs.org](mailto:julie@johnhancockcs.org)

*Below, list the names and positions of all current Board Members (officers, members, directors, partners), and their positions. Also list any other current charters in which they act as a corporate principal or charter representative. Add rows as necessary.*

Name	Position	All Charter Affiliations
Kim Frank	Chair	John Hancock Charter School
McKay Ballard	Vice President	John Hancock Charter School
Allison Clinger	Secretary	John Hancock Charter School
Wendy Morgan	Treasurer	John Hancock Charter School
Jolene Romero	Member	John Hancock Charter School
Joe Spencer	Member	John Hancock Charter School
Kyle Tippetts	Member	John Hancock Charter School

**Contractual Charter Agreement Goals**

Per documentation provided by Utah State Charter School Board staff in 2015, there are no school goals in the charter application/agreement labeled and written as “goals”. Instead, the academic outcomes in the John Hancock Charter School Charter Agreement are listed as key elements:

- Any major shift in the school’s mission, philosophy, or curriculum must be approved by the Board of Directors and by a two-thirds majority vote of the parent organization at the annual May meeting.
- JHCS will use the Core Knowledge Sequence, which will set us apart from other public schools in Utah County, and all curricula will support Core Knowledge and its philosophy.
- Teachers must have the freedom to develop child-centered methods of teaching. Each teacher will choose how to present and teach the curriculum. To accomplish this, they will have personal and common preparation time to develop lesson plans according to the guidelines provided by the State of Utah and the Core Knowledge Sequence.
- JHCS will provide “hands-on” learning experiences as often as possible. Such subjects as art, music, technology and science lend themselves well to this approach.

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- JHCS will also provide students with a much smaller classroom size than is currently available from the majority of the public schools in the area (our goal is 1/20 ratio).
- Another special aspect of JHCS is school size. With anticipated enrollment of up to 140 and total enrollment at approximately 180 students, we will truly be a small, community school. This will create many benefits, one in particular being a sense of belonging for all students.
- On average all students will meet or exceed appropriate grade level requirements as stated by the Utah State Core Curriculum
- JHCS intends to provide parents an unprecedented opportunity for hands-on involvement in the structure and operation of their children's school. All parents and guardians become members of the school's parent organization. Every member of the parent organization will: Collectively elect two governing board members, including the Vice President and Parent Advocate position; Be requested to volunteer at least six hours a month; Be encouraged to make comments and suggestion related to policies, procedures, program, curriculum, and other issues at the monthly board meetings; be encouraged to serve in the PTO; be encouraged to serve on a Parent Working Committee.
- Teachers shall: be licensed and certified by the State of Utah or be qualified to teach under the USOE alternative certification or authorization program; Demonstrate a willingness to support JHCS's mission, believe statements, purpose, philosophy, goals and vision; Complete their job duties with minimal supervision; Agree to be trained in the Core Knowledge Sequence; Agree to teach the Core Knowledge Sequence; Have a desire to use innovative teaching methods.

### **Required Attachments:**

- If the school is *not* meeting all its charter contractual agreement goals, then include the governing board's corrective action plan. (Corrective action plan limited to two pages.)

Not applicable as the school is meeting all of its charter contractual agreement goals.

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# Requested Amendment(s) to Charter

1. Complete as many sections as apply.
2. Provide requested details and supporting documentation as outlined for each amendment requested.

### ***Change to curricular or instructional emphasis, including educational program or methods of instruction.***

#### **Required Attachments:**

- A redline version showing new additions and removed language in educational program or methods of instruction.
- Documentation of new, evidence-based choice, as well as anticipated improvement in student performance.

### ***Relocating to a new school district or municipality.***

*Operational schools:* Describe the decision to move and the projected impact on enrollment.  
Click or tap here to enter text.

#### **Required Attachments:**

- Supporting evidence for decision.
- Minutes from the board meeting where parents and student provided feedback.

*Planning year schools:*

#### **Required Attachments:**

- Detailed market analysis of newly proposed location.
- Corresponding capital facility plan.
- Revised budget for the planning year and first three operational years.

### ***Articulation agreement.***

Describe the purpose for the articulation agreement.  
Click here to enter text.

#### **Required Attachments:**

- Provide a copy of the school's proposed articulation agreement signed by all participating charter school(s).

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### ***Change to effectiveness goals, performance measures, or accountability plan.***

#### **Required Attachments:**

- Redline version showing new additions and ~~removed language~~ in contractual agreement performance measures.
- Provide supporting documentation for the requested change.

### ***Postponement of opening year.***

Describe the reason for postponing the school's opening year.

[Click here to enter text.](#)

#### **Required Attachments:**

- Include additional supporting documentation as necessary.

### ***Change to Bylaws, Articles of Incorporation, or contractual agreement specific to number of board members or board member election / appointment process.***

#### **Required Attachments:**

- A redline version showing new additions and ~~removed language~~ in Bylaws.

See attachment A. Changes to the structure of the governing board are to ensure the Board is composed of individuals with necessary expertise and allow it flexibility in its governance structure and appointment process.

### ***Removal of original application sections – not applicable to Exhibit A contracts***

#### **Required Attachments:**

- A redline version showing new additions and ~~removed language~~, or
- If completely rewritten, the new policy or procedure with new effective date, indicating superseding of previous policy or procedure.
- Excerpt from board minutes at which policy was approved

*NOTE: Policies, procedures, and minutes can be provided through a specific hyperlink to the exact policy, procedure, or minutes.*

#### *Examples:*

- Job descriptions for educators and administration, including business administrator
- Selection of Education Service Providers
- Financial performance and sustainability goals
- Board performance and stewardship goals
- Student achievement levels for assessments no longer required by USBE (e.g., end of level CRT, IOWA, DWA, etc.)

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- Acceptable use and social media policy
- Extra-curricular activities and fee schedules

*NOTE: SCSB staff will review policy or procedure for compliance with state law and board rule.*

**Change to School Mission or Purpose(s)**

Describe the process the governing board followed when making this decision, as well as why a change to mission and/or purpose(s) is necessary for the governing board to meet the terms and conditions in its contractual agreement.

Click here to enter text.

**Required Attachments:**

- A redline version showing new additions and removed language in school mission and/or purpose(s).

**Change to grades served or decrease in student enrollment.**

Summarize the governing board's discussion that led to the decision to reduce grade levels or number of students served.

Click here to enter text.

**Complete:**

	Grades and Specific Number of Students Served by Grade												Max Enrollment	
Current	K	1	2	3	4	5	6	7	8	9	10	11	12	
SY														
Proposed	K	1	2	3	4	5	6	7	8	9	10	11	12	
SY														

**Other Amendments Not Previously Identified Above**

Please describe amendment request.

**John Hancock Charter School (JHCS) requests to add 1,400 students to its Eagle Mountain campus in two phases as described in the attachments starting in fall 2026 and ending in fall 2028.**

**Required Attachments:**

- Details and supporting documentation as appropriate.
- Additional information may be requested following review and request may require SCSB or USBE approval.

See Attachment B

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## ATTACHMENT A

Redline copy of proposed governing board changes

**ARTICLE 3: BOARD OF DIRECTORS**

**Section 3.1 General Powers.** The business and affairs of John Hancock Charter School shall be managed by its Board of Directors, except as otherwise provided in the Utah Nonprofit Corporation and Cooperative Association Act, the Articles of Incorporation, or these Bylaws.

**Section 3.2 Number of, Selection of, Tenure of, and Qualifications for Board Members.** The number of members of the Board of Directors of the Corporation shall be fixed by the charter. The charter states that there will be a minimum of ~~seven~~ five and a maximum of twelve positions on the Board of Directors that will govern John Hancock Charter School. The Board will select from its members a Chief Administrative Officer (CAO) and a Secretary (the Vice President ~~or~~ Treasurer ~~and~~ Parent Advocate may not serve as CAO or Secretary).

Initially the CAO, Treasurer, Secretary, and position six will be three-year terms. The Vice President, Parent Advocate, and position seven will be two-year terms.

If the CAO determines there is a need for more than ~~seven~~ five board positions, then the ~~sixth through eighth and ninth positions will be three year terms. The tenth, eleventh, and twelfth positions will serve at the discretion of the board, each be two year terms.~~ All board positions ~~except the Vice President and the Parent Advocate positions (which will be elected by the parent organization)~~ will be filled by appointment by the existing Board of Directors.

~~At the annual membership meeting in May 2003, three positions will be filled due to the expiration of the initial two year terms. One position will be filled by appointment from the first year's board, while the Vice President and Parent Advocate positions will be elected by the parent organization. This ensures a board member service rotation.~~ There will be no term limits for board positions.

~~Two thirds of the Board members must be~~ may include parents, grandparents, professionals, or community members, ~~or guardians of children enrolled at John Hancock Charter School.~~ The remaining one third of the positions may also be filled with parents, grandparents, or guardians or ~~may be selected from the community at large, preferably having backgrounds in education, business, accounting, or law.~~ Members of the governing board must be willing to submit to a background check and may not have a criminal record.

The school director will serve as an ex officio board member without voting privileges.

**Section 3.3 Vacancies.** Vacant or retiring positions that are appointed by the board will be filled using the following method. The Board Development Committee will recruit and submit to the board as many candidates as it sees fit, but it must provide enough candidates for a choice. A board member may not vote for his or her position if he or she is a candidate. In the case of a tie, the matter shall be placed for a vote before the parent organization. The majority vote of the parent organization will constitute one board vote, thus breaking the tie.

**Section 3.4 Regular Meetings and Attendance.** Regular meetings of the Board of Directors shall be held monthly or as needed. Notice for such meetings shall be given at least 24 hours in advance. ~~An annual meeting shall be held in May.~~ Board meetings will remain open to the public unless a closed session is convened by a majority vote of members present, which closed session will be subject to the requirements of Utah State Law.

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**Section 3.5 Special Meetings.** Special meetings of the Board of Directors may be called by or at the request of any board member. The person or persons authorized to call special meetings of the board of Directors will provide proper notice and may fix any place, date, and time for holding any special meeting of the board called by them, which special meeting will follow normal open-meeting requirements as outlined by the State of Utah.

**Section 3.6 Notice.** Notice of each meeting of the Board of Directors stating the place, day, and hour of the meeting shall be given to each member at least 24 hours in advance and shall be posted on the school website and posted on the Utah Public Notice website forwarded to the local newspaper at least 24 hours in advance.

**Section 3.7 Quorum and Voting.** ~~A majority of the number of~~ Five or more board members shall constitute a quorum, but if less than such ~~majority number~~ is present at a meeting, a majority of the members present may adjourn the meeting from time to time without further notice than an announcement at the meeting until a quorum shall be present.

**Section 3.8 Proxies.** For purposes of determining a quorum with respect to a particular proposal, and for purposes of casting a vote for or against a particular proposal, a board member may be considered to be present at a meeting and to vote if the member has granted a written or oral proxy to another member who is present at the meeting and which authorizes the other member to cast the vote that is directed to be cast by the written or oral proxy with respect to the particular proposal that is described with reasonable specificity in the proxy. Such proxy shall be noted in the minutes of that meeting. Participation in such meeting by proxy shall constitute attendance and presence in person at the meeting of the person or persons so participating by proxy for all purposes herein. Any member participating by proxy shall not be deemed to have participated in such meeting except with respect to the matters set forth in the written or oral proxy.

**Section 3.9 Manner of Acting.** The act of the majority of the board members present at a meeting at which a quorum is present shall be the act of the Board of Directors.

**Section 3.10 Electronic Meetings by Telephone.** Members of the Board of Directors or any other committee thereof may participate in a meeting of the board or committee by means of electronic meeting, conference telephone, or similar communications equipment. Such participation shall constitute presence in person at the meeting.

**Section 3.11 Action without a Meeting.** All official actions of the board must be done in a public meeting in accordance with Utah State Law.

**Section 3.12 Presumption of Assent.** A member of the Board of Directors of John Hancock Charter School who is present at a meeting of the Board of Directors at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless his or her dissent is entered in the minutes of the meeting.

**Section 3.13 Compensation.** Board members shall not receive compensation for their service on the board, although the reasonable expenses relating to the furtherance of the corporation's mission may be paid or reasonable compensation paid for services rendered in the furtherance of the corporation's mission outside of service on the Board of Directors.

**Section 3.14 Resignation.** A board member may resign at any time by giving notice of resignation to either the Board of Directors or the CAO or Secretary of the Corporation, and unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective, but such resignation shall be effective when notice is delivered.

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**Section 3.15 Removal.** Any board member may be removed by a majority vote of the Board of Directors whenever in its judgment the best interests of the Corporation will be served thereby, but such removal shall be without prejudice to the contract rights, if any, of the person so removed. ~~Election or~~ Appointment of a board member shall not in itself create contract rights.

**Section 3.16 Executive and Other Committees.** By one or more resolutions, the Board of Directors may designate from among its members an executive committee and one or more other committees.

**Section 3.17 Authority and Duties of Board Members.** The members of the Board of Directors of the Corporation shall have the authority and shall exercise the powers and perform the duties specified below and as may be additionally specified by CAO, the Board of Directors, or these bylaws, except that in any event each board member shall exercise such powers and perform such duties as may be required by law.

- a. **President/CAO.** The President/Chief Administrative Office (CAO) shall preside over all meetings of the Board of Directors, executing the powers and performing the duties of the office as outlined by the Board. The CAO shall coordinate the monitoring and functions of the school. He or she must be available to convene impromptu committee meetings and emergency board meetings, prepare board meeting agendas and attend said meetings, attend applicable USOE meetings, oversee his or her chosen committees, determine the number of board positions (minimum of ~~seven~~ five with a maximum of twelve), complete assignments, and promote the mission and vision of the school at all levels.
- b. **Vice President.** The Vice President shall preside over board meetings when the President is unavailable, be available to attend impromptu committee meetings and emergency board meetings, attend applicable USOE meetings, oversee his or her chosen committees, attend monthly board meetings, complete assignments, promote the mission and vision of the school at all levels, and when necessary meet with the executive officer to discuss the day-to-day operations of the school and any concerns.
- c. **Secretary.** The Secretary shall keep, review, and publish minutes of board meetings; attend applicable USOE meetings; be responsible for all required reports/data required by the USOE; oversee his or her chosen committees; attend monthly board meetings; complete assignments; and promote the mission and vision of the school at all levels.
- d. **Treasurer.** The Treasurer shall keep and review the financial matters and transactions of the school, oversee the budget, present and interpret monthly financial reports to the board, attend applicable USOE meetings, chair the Finance Committee, support and facilitate the scope of the Finance Committee, oversee his or her chosen committees, and attend monthly board meetings. The treasurer shall also complete assignments, sign all checks that require a purchase order, and promote the mission and vision of the school at all levels. As chair of the Finance Committee, the Treasurer will secure regular audits and/or reviews of the school, prepare and present the annual budget to the board for approval, review and make recommendations regarding fiscal management policies and procedures, and perform all other duties of the office as outlined by the Board.
- e. **Parent Liaison Advocate.** The Parent Liaison Advocate represents the parent organization on the board. He or she shall attend applicable US~~O~~BE meetings, oversee his or her chosen committees, attend monthly board meetings, complete assignments, and promote the mission and vision of the school at all levels.

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**f. Positions 6–12.** Board members who hold positions 6 through 12 (~~#6 and #7 must be filled; #8 through #12 are filled at the discretion of the CAO~~) oversee their chosen committees, attend applicable US~~O~~BE meetings, attend monthly board meetings, complete assignments, and promote the mission and vision of the school at all levels.

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**ATTACHMENT B**  
**Two Phase Expansion Plan**

***Charter Fidelity***

**The request is consistent with the charter school's Charter Agreement:** The approved application of John Hancock Charter School (JHCS) clearly indicates it may, at its discretion, amend its application in accordance with the provision in the Utah Charter Act, (originally 53A-1a-508-4), to add additional grades through twelfth grade. Its Charter Agreement with the Utah State Charter School Board indicates it can request to increase enrollment beyond that set out in its initial Agreement by submitting a request to its authorizer. Neither the application nor the Agreement prohibits John Hancock Charter School from opening future schools, expanding grade levels served, expanding enrollment, changing locations, etc.

**Met all academic goals in the Charter Agreement:** The mission of John Hancock Charter School contains the school's primary goal, which is "to help students learn how to learn, to love learning, and to become responsible citizens and productive members of society". Specific goals in the approved application include:

- Instill the love of learning.
- Prepare students to become responsible citizens and productive members of the community.
- Provide a solid academic foundation for future learning.
- Instill an appreciation for the cultural and fine arts.
- Provide a strong technology base in order to equip students with the knowledge and skills they need to succeed in this rapidly evolving world.
- Ultimately become an official Core Knowledge School.

**Student performance**

**John Hancock Charter School performance compared to the State:** Below is a longitudinal look at John Hancock Charter School proficiency in language arts (LA), Mathematics (M), and science (S) according to the Utah State Board of Education data gateway. As you will note, John Hancock Charter School consistently met or exceeded state performance until SY2024 when it increased its student population by over 400% when opening its Eagle Mountain campus. Proficiency data from SY2024 will be used as the new baseline for student performance and the school anticipates by using its proven educational model student performance will increase every year until it exceeds the State average similar to how it did before adding a new campus.

Table 1: Percentage of JHCS students meeting or exceeding requirements by year and subject area compared to the State.

	2023-2024			2022-2023			2021-2022			2020-2021		
	LA	M	S									
JHCS	35.5	36.7	45.6	49.1	56.1	58.3	52.7	60.9	61.4	53.3	61.1	60.5
State	44.3	41.1	46.7	44.5	40.5	45.2	43.7	41.0	44.5	43.1	39.0	43.8

**John Hancock Charter School performance compared to other nearby schools on statewide assessments:** Below is a longitudinal look at John Hancock Charter School student proficiency in language arts (LA), mathematics (M), and science (S) according to the Utah State Board of Education data gateway compared to the two schools closest in proximity to each respective John Hancock Charter School campus. As you will

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note, John Hancock Charter School – Pleasant Grove consistently outperformed its comparison schools. Once the Eagle Mountain campus opened, the overall student proficiency level declined and more closely matched the performance of Eagle Mountain comparison schools.

Proficiency data from SY2024 will be used as the new baseline for student performance and the school anticipates by using its proven educational model, student performance will increase every year until it exceeds the nearby school averages similar to how it did before adding a new campus.

Table 2: Percentage of JHCS students meeting or exceeding requirements by year and subject area compared to the two most nearby schools for each campus (P – Pleasant Grove; E – Eagle Mountain)

	2023-2024			2022-2023			2021-2022			2020-2021		
	LA	M	S									
JHCS	35.5	36.7	45.6	49.1	56.1	58.3	52.7	60.9	61.4	53.3	61.1	60.5
Central (P)	41.3	40.5	50.2	39.0	31.9	40.3	40.4	36.5	40.7	36.4	34.8	44.0
Grovecrest (P)	53.6	40.4	48.4	51.4	46.5	57.7	52.1	46.5	57.5	47.2	42.2	54.8
Mountain Trails (E)	31.6	31.1	39.0	36.2	33.0	40.3	35.2	35.0	42.0	38.5	30.0	38.6
Eagle Valley (E)	35.6	32.3	45.7	39.9	38.3	47.3	43.1	35.1	50.2	39.7	34.9	47.4

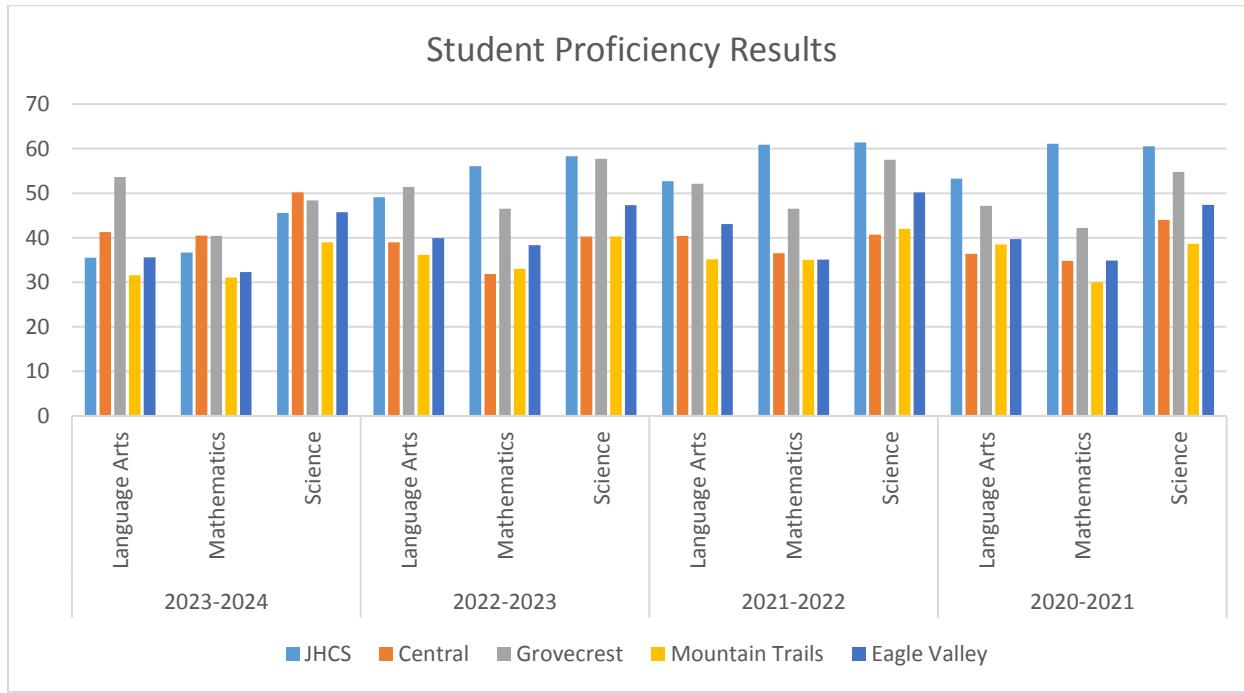


Figure 1: Percentage of JHCS students meeting or exceeding requirements by year and subject area compared to nearby schools.

### Financial performance

**Financial statements:** John Hancock Charter School financial statements report revenues in excess of expenditures for 3 of the last 5 fiscal years:

FY2019: Revenue - \$1,355,448; Expenditures - \$1,361,681

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FY2020: Revenue - \$1,486,329; Expenditures - \$1,542,440

FY2021: Revenue - \$1,739,677; Expenditures - \$1,702,207

FY2022: Revenue - \$1,953,460; Expenditures - \$1,989,214

FY2023: Revenue - \$3,909,972; Expenditures - \$3,876,154

Note that in FY2020, John Hancock Charter School purchased a piece of property using money from its savings account that allows the school to access all its property. There is nowhere in the financial statement to account for John Hancock Charter School using savings for a portion of its expenditures. As such, FY2020 shows higher expenditures than revenue.

Note that in FY2022 the Eagle Mountain campus opened, and the school incurred increased expenditures directly relating to the increase in student enrollment.

All data provided in the Metric Table far exceeds the minimum “requirements” shown in the “STANDARD” column of the chart. Minor fluctuations in year-to-year financial data are inevitable with a small campus model.

Table 3: Financial performance for FY2022 – current as of 8/31/24

Metric	Standard	3 Prior FY	2 Prior FY	Prior FY	Current YTD
		FY2022	FY2023	FY2024	FY2025
Unrestricted Days Cash	>30	244.75	207.75	68.6	57.8
Debt to Asset Ratio	<1	0.128	0.119	0.191	0.141
Current Ratio	>1	8.02	6.21	5.22	7.07
Audit Findings	0	1	2	1	N/A
Change in Net Position	Positive	Positive	Not Positive	Positive	N/A

## **Market Analysis**

John Hancock Charter School certifies there is a market demand for the proposed school.

Eagle Mountain is coming up on 28 years old and is already the 15<sup>th</sup> largest city in Utah. It's located in Utah County, west of Lehi, and spans over 50 square miles of land. Its population grew from 44,616 in 2020 to 61,037 in 2024 and is growing at a rate of 7.21% annually (sources: Eagle Mountain City, World Population Review). Eagle Mountain is the third fastest growing city in Utah and has 4,332 lots currently under construction (source: United States Census Bureau, Eagle Mountain City).

Alpine School District (ASD) serves its Eagle Mountain K – 8 students in seven elementary schools and one middle school, and there are also two other charter schools, The Ranches Academy and Rockwell Charter High School. Alpine School District knows it needs to build additional school buildings to serve students in Eagle Mountain, but, a tax bond shot down by voters in 2022 means there will be no new elementary schools and only one new middle school to help with the student population growth until financing for additional schools is approved by voters (Note: The March 2024 bond public hearing was canceled and is not moving forward at this time).

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With Alpine School District only opening one new middle school in the foreseeable future, and with the expected elementary school growth in Eagle Mountain indicated in reports by the Utah State Board of Education, Alpine School District, and Eagle Mountain City, it is imperative that John Hancock Charter School expansion be approved and begin plans to open its expansion facility for students as soon as possible (both Phases 1 and 2). John Hancock Charter School will continue to work with Alpine School District and Eagle Mountain City to ensure its final location for Phase 2 provides educational services for the area in the greatest need according to all entities involved (i.e., ASD and Eagle Mountain City).

### Expansion Plan

**Minutes:** The John Hancock Charter School governing board authorized a two-phase expansion plan and application at its October 3, 2024 meeting.

John Hancock Charter School has experienced significant demand at its Eagle Mountain Campus and has a waitlist of 382 students, in addition to the waitlist of 397 students for the Pleasant Grove Campus. According to the Eagle Mountain City website, there are 4,332 lots currently under construction. The city indicates the average household size is 4.4 people. Using this information, along with the Alpine School District Enrollment History & Projection Report published in November 2023, John Hancock Charter School estimates if each lot has one elementary student the city needs to be prepared to educate around 4,000 additional elementary-aged students in the next few years.

Phase 1: Add 400 students to the current Eagle Mountain Campus in fall 2026, bringing the campus total to 1,300 students K – 8. John Hancock Charter School currently has a parcel of land under contract that is within walking distance from the existing building. This new building location will house the additional 400 students in the grade configuration that makes the most sense after talking with Alpine School District regarding its new middle school enrollment.

Phase 2: Open a new Eagle Mountain campus in fall 2028 that serves 1,000 students in grades K – 6 at a location that best benefits Eagle Mountain City and Alpine School District. John Hancock Charter School will work with both entities to ensure its new location meets current demand and needs.

### Facilities

John Hancock Charter School certifies the school will obtain adequate facilities for the proposed expansion in Eagle Mountain (Phases 1 and 2).

Having been in both a non-traditional facility and new construction, we know what can be done to improve the new facilities constructed as part of this expansion plan. An RFP to identify the developer was issued and a decision from the responses submitted will be determined in the near future.

John Hancock Charter School intends to purchase our new facility by bonding. Building will begin in the spring of 2025 for opening in the fall of 2026.

### Population and Enrollment

John Hancock Charter School understands and agrees to the conditions that the John Hancock Charter School advertisements and enrollment policies are consistent with state law and USBE rule and that the enrollment of new students requested in this expansion request cannot begin until the Utah State Charter School Board has approved the Amendment request to add students and the Utah State Board of Education has received notice of the State Charter School Board's action.

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## Phase 1

Expansion at current Eagle Mountain campus

Grade levels to be served: K – 8

Projected Maximum Enrollment: 400 new students + 900 current students

## Phase 2

Expansion to new Eagle Mountain campus

Grade levels to be served: K – 6

Projected Maximum Enrollment: 1,000

Total John Hancock Charter School Maximum enrollment (all locations): 2,500

Table 4: Estimated maximum enrollment by grade in Eagle Mountain (may change after ASD middle school opens)

	K	1	2	3	4	5	6	7	8	Total
SY27	143	143	143	143	143	143	142	150	150	1,300
SY28	143	143	143	143	143	143	142	150	150	1,300
SY29	143	143	143	143	143	143	142	150	150	1,300
SY30	286	286	286	286	286	285	285	150	150	2,300

Note: No changes are requested to the 200-student enrollment maximum at the Pleasant Grove location.

**Marketing strategies**

Once the final location is determined and the satellite school is approved, John Hancock Charter School will publicize and market to a broad cross-section of families and prospective students, including students with diverse racial, ethnic, linguistic, and socioeconomic backgrounds, and students with disabilities. Examples of outreach will include many of the strategies in the table below. Strategies will be refined as the governing board learns what works best with the Eagle Mountain community.

Table 5: Probable marketing activities JHCS will use to communicate with families of potential students.

Strategy	Tactic	Description	Potential Yield
Earned Media	Local earned media	Conduct outreach to local media and pitch a story regarding the school, teachers, families, and students	Med.
Paid Media	Local newspaper advertisements	Purchase ad space in local newspapers – either print or online (e.g., Lehi Pointe, Crossroads Journal, etc.)	Med.
	Facebook advertisements	Purchase localized Facebook ads where parents who are interested in learning more can contact the school	Med.
	Google advertisements	Purchase localized Google ads where parents who are interested in learning more can contact the school	Med.
	Prominent signage	Display clear, legible, and branded signage promoting the school in key areas throughout the local community	Low

## Amendment Request – John Hancock Charter School

Direct Outreach	Email and internet marketing through local businesses, community-based organizations, and elected officials	Connect with stakeholders who may have email lists (e.g. local businesses, ESPs, offices of elected officials) to garner their support and seek inclusion in any community- related newsletters or email blasts	Med.
	Social media announcements	Post announcement on the school's social media accounts, as well as encourage partners and stakeholders with broad social media “followers” to repost our announcements	Low
	Door-to-door canvassing	Build volunteer teams of parents, students, or school staff to canvass door-to-door in local communities with informational brochures, flyers, and enrollment forms	High
	Community events	Identify local events through community calendars, for example, and staff said events with a table	Med.
	Canvassing in commercial/public gathering areas	Canvass populated areas in local communities to hand out school and enrolment information to community members	Med.
	Parent-to-parent outreach and referrals	Leverage current parent supporters to refer friends, family, and neighbors.	High
	Student-to-family engagement	Leverage students that can effectively demonstrate what it feels like to be at the school.	High
	After-school programs	Survey after-school programs that serve kids in the local community (e.g., Boys & Girls Club, sports leagues, etc.) and partner to make a presentation about the school to parents	High
	School event	Coordinate school event to generate interest (e.g., enrollment fair, community festival, etc.). Encourage families to bring friends & family. Invite local media, elected officials, community-based organizations, and other stakeholders to participate in the event.	Med.
	School tour	Once facility is secured, host a school tour for prospective families and supporters (invited via door hanger, direct mailing, phone calls, etc.). Once the school is in operation, students will lead tours and engage with visitors.	High
	1:1 Meetings	Schedule <i>multiple</i> one-on-one meetings with parents. Leverage the power of current parent supports to engage other parents and champion the school.	High
	Phone banking	Build volunteer teams of parents, students, and school staff to phone canvass local community and build awareness of charter school and enrollment opportunities	Low
	Direct mail campaign	Execute mail program to send new school and student enrollment announcement to list (e.g., targeted list or commercial list by zip code)	High

## Amendment Request – John Hancock Charter School

Mail	Postcards	Write personalized postcards to parents in the community from direct mail campaign list.	High
	Door hangers	Build volunteer teams of founding team members, parents, students, and school staff to execute a door hanger drop in local school community	Low
Partnership Building	Local community-based organizations	Connect and build relationships with regional, local, and micro community organizations (e.g., community centers, churches, religious institutions, etc.) to understand and see how you can help meet the community's needs	Med.
	Local charter leaders	Connect with local charter leaders to share best practices and insights in developing outreach/enrollment strategy, which may help refine potential strategies	Med.

The John Hancock Charter School governing board and administration, at a minimum, will analyze targeted enrollment and actual numbers on a monthly basis and readjust the student recruitment plan as deemed necessary. John Hancock Charter School will continue its recruitment efforts following the start of the school year if enrollment is not at capacity with the intention of boosting enrollment before October 1.

### ***Continued Success***

Each school will have its own school administration, either an assistant administrator or lead teacher, which will provide adequate administrative staffing to perform administrative responsibilities at each location. All schools will share a business administrator and superintendent, which ensures charter fidelity. All schools will follow the John Hancock Charter School proven educational model and will improve student proficiency in language arts, mathematics, and science until it meets the key element of its charter, which is 'On average all students will meet or exceed appropriate grade level requirements as stated by the Utah State Core Curriculum.'

### ***Financial Viability***

Since its opening, in FY2003, John Hancock Charter School has consistently shown positive net financial outcomes on its Financial Statements. John Hancock Charter School certifies the school is financially viable and has provided evidence below.

John Hancock Charter School's business office uses Governmental Accounting Standards Board (GASB) standards for accounting and reporting of financial data to the Utah State Board of Education, as well as the state and federal government. The John Hancock Charter School Board receives a monthly financial report from the Business Administrator. Budget documents are provided for board member review prior to the meeting. Members may make budget inquiries at the meeting, or at any time.

John Hancock Charter School's governing board reviews school financials at its monthly meetings, including budget to actuals, financial reports, and budget projections for estimated and actual enrollment. In addition, at appropriate times, the John Hancock Charter School Board has responded to unanticipated economic changes by responsibly utilizing school reserves and assets to maintain a financially healthy and fun educational environment.

## Amendment Request – John Hancock Charter School

The Pro Forma FY27 (Phase 1 Expansion) for the current campus shows the school at its operational status quo, while adding 400 additional student capacity. The Pro Forma FY29 (Phase 2 Satellite) for a new campus shows the school at its operational status quo, while adding 1000 additional student capacity.

**JOHN HANCOCK CHARTER SCHOOL (LEA)\***

	<b>FY25</b> 1050	<b>FY26</b> 1100	<b>FY27</b> 1450	<b>FY28</b> 1500	<b>FY29</b> 2500
<b>REVENUE</b>					
<b>Revenue by Source</b>					
1000 Local	\$ 359,000	\$ 350,000	\$ 400,000	\$ 420,000	\$ 625,000
3000 State	\$ 12,029,996	\$ 12,631,496	\$ 17,483,139	\$ 18,357,295	\$ 32,125,267
4000 Federal	\$ 210,001	\$ 220,501	\$ 305,193	\$ 320,453	\$ 560,793
<b>Total Revenue by Source</b>	<b>\$ 12,598,997</b>	<b>\$ 13,201,997</b>	<b>\$ 18,188,332</b>	<b>\$ 19,097,749</b>	<b>\$ 33,311,060</b>
<b>Other Financing Resources</b>					
5100 Proceeds of bond issues	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
<b>Total Other Financing</b>	<b>\$ 0</b>				
<b>Total Revenue</b>	<b>\$ 12,598,997</b>	<b>\$ 13,201,997</b>	<b>\$ 18,188,332</b>	<b>\$ 19,097,749</b>	<b>\$ 33,311,060</b>
<b>EXPENDITURES</b>					
100 Salaries and wages					
110 Entity administration	\$ 234,562	\$ 246,290	\$ 340,888	\$ 357,932	\$ 626,381
120 School administration	\$ 289,500	\$ 303,975	\$ 420,729	\$ 441,765	\$ 773,090
130 Licensed instructional	\$ 4,359,941	\$ 4,577,938	\$ 6,336,282	\$ 6,653,097	\$ 11,642,919
140 Other licensed	\$ 146,106	\$ 153,411	\$ 212,335	\$ 222,952	\$ 390,166
150 Office	\$ 203,000	\$ 213,150	\$ 295,019	\$ 309,770	\$ 542,097
160 Para-professional	\$ 1,096,268	\$ 1,151,081	\$ 1,593,201	\$ 1,672,861	\$ 2,927,507
180 Operation/maintenance	\$ 221,490	\$ 232,565	\$ 321,890	\$ 337,985	\$ 591,474
190 Other salaries	\$ 222,660	\$ 233,793	\$ 323,591	\$ 339,770	\$ 594,598
<b>Total 100 Salaries and wages</b>	<b>\$ 6,773,527</b>	<b>\$ 7,112,203</b>	<b>\$ 9,843,936</b>	<b>\$10,336,133</b>	<b>\$18,088,232</b>
<b>200 Employee benefits</b>					
220 Social security/Medicare	\$ 545,060	\$ 572,313	\$ 792,133	\$ 831,740	\$ 1,455,545
230 Retirement	\$ 56,000	\$ 59,360	\$ 82,942	\$ 87,919	\$ 155,323
240 Group insurance	\$ 600,000	\$ 630,000	\$ 871,977	\$ 915,576	\$ 1,602,258
270 Industrial Insurance	\$ 11,000	\$ 11,550	\$ 15,986	\$ 16,786	\$ 29,375
280 SUTA	\$ 10,000	\$ 10,500	\$ 14,533	\$ 15,260	\$ 26,704
290 Other benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
<b>Total 200 Employee benefits</b>	<b>\$ 1,222,060</b>	<b>\$ 1,283,723</b>	<b>\$ 1,777,572</b>	<b>\$ 1,867,280</b>	<b>\$ 3,269,205</b>
<b>300 Professional and technical</b>					
310 Office/admin. services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
320 Educational services	\$ 181,150	\$ 190,208	\$ 263,264	\$ 276,428	\$ 483,748
330 Employee training/dev.	\$ 175,070	\$ 183,824	\$ 254,428	\$ 267,150	\$ 467,512

## Amendment Request – John Hancock Charter School

340 Other professional services	\$ 63,900	\$ 67,095	\$ 92,866	\$ 97,509	\$ 170,641
350 Technical services	\$ 175,785	\$ 184,574	\$ 255,468	\$ 268,241	\$ 469,422
<b>Total 300 Prof. &amp; Technical</b>	<b>\$ 595,905</b>	<b>\$ 625,700</b>	<b>\$ 866,026</b>	<b>\$ 909,327</b>	<b>\$ 1,591,323</b>
<b>400 Property services</b>	<b>\$ 693,603</b>	<b>\$ 500,000</b>	<b>\$ 700,000</b>	<b>\$ 600,000</b>	<b>\$ 1,050,000</b>
<b>500 Other purchased services</b>					
510 Student transportation	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
518 Student day trips/field trips	\$ 5,000	\$ 5,250	\$ 7,266	\$ 7,630	\$ 13,352
520 Insurance	\$ 8,382	\$ 8,801	\$ 12,182	\$ 12,791	\$ 22,384
530 Communication	\$ 10,300	\$ 10,815	\$ 14,969	\$ 15,717	\$ 27,505
540 Advertising	\$ 32,000	\$ 33,600	\$ 46,505	\$ 48,831	\$ 85,454
580 Travel, per diem	\$ 25,000	\$ 26,250	\$ 36,332	\$ 38,149	\$ 66,761
<b>Total 500 Other purchased svc.</b>	<b>\$ 80,682</b>	<b>\$ 84,716</b>	<b>\$ 117,255</b>	<b>\$ 123,118</b>	<b>\$ 215,456</b>
<b>600 Supplies and materials</b>					
610 General supplies	\$ 729,752	\$ 550,000	\$ 761,250	\$ 799,313	\$ 1,398,797
620 Energy related	\$ 75,000	\$ 78,750	\$ 108,997	\$ 114,447	\$ 200,282
641 Textbooks	\$ 76,538	\$ 60,000	\$ 83,045	\$ 87,198	\$ 152,596
642 eTextbooks	\$ 46,867	\$ 30,000	\$ 41,523	\$ 43,599	\$ 76,298
650 Periodicals, AV materials	\$ 102,304	\$ 90,000	\$ 124,568	\$ 130,797	\$ 228,894
670 Computer, software, technology	\$ 146,578	\$ 153,907	\$ 213,021	\$ 223,672	\$ 391,426
<b>Total 600 Supplies &amp; materials</b>	<b>\$ 1,177,039</b>	<b>\$ 962,657</b>	<b>\$ 1,332,405</b>	<b>\$ 1,399,025</b>	<b>\$ 2,448,294</b>
<b>700 Property</b>					
710 Land and site improvement	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
720 Buildings	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
<b>Total 700 Property</b>	<b>\$ 0</b>				
<b>800 Other objects</b>					
810 Dues and fees	\$ 6,941	\$ 7,288	\$ 10,087	\$ 10,592	\$ 18,535
830 Interest payments	\$ 1,400,000	\$ 2,100,000	\$ 2,500,000	\$ 2,500,000	\$ 3,200,000
840 Debt principal payments	\$ 0	\$ 0	\$ 0	\$ 300,000	\$ 700,000
890 Other debt service	\$ 92,400	\$ 81,600	\$ 81,600	\$ 81,600	\$ 0
<b>Total 800 Other objects</b>	<b>\$ 1,499,341</b>	<b>\$ 2,188,888</b>	<b>\$ 2,591,687</b>	<b>\$ 2,892,192</b>	<b>\$3,918,535</b>
<b>Total Expenditures</b>	<b>\$ 12,042,157</b>	<b>\$ 12,757,888</b>	<b>\$ 17,228,881</b>	<b>\$ 18,127,074</b>	<b>\$ 30,581,045</b>
<b>Total School Oper. Net Rev.</b>	<b>\$ 556,840</b>	<b>\$ 444,109</b>	<b>\$ 959,451</b>	<b>\$ 970,675</b>	<b>\$ 2,730,015</b>

## Amendment Request – John Hancock Charter School

Annual escalation to employee compensation and benefits, as well as operational costs and bond service is considered in this narrative.

### Highlights:

- Overall annual expenditures are labor intensive. Historically, labor costs have represented 70% in FY19, 70% in FY20, and 67% in FY21. Object 100 (salaries) and 200 (benefits) are projected to represent 63.9% in FY27 and FY28, and 64.12% in FY29. Consistent with previous years hiring practices, John Hancock Charter School uses the step-and-lane approach similar to Alpine School District. New proportional expenditures will be distributed between the existing proposed “schools-within-a-school,” which have been successfully modeled at the current Eagle Mountain school. Additional Deans of Students, Special Educators, licensed classroom educators, paraeducators, and central administrative support, are provided to deliver the John Hancock small school model.
- General market conditions. Market inflation escalated in 2024 up 2.4%. Estimates show increases up 1.8% over 2025-2028 (annually). [Morningstar] Other estimates and projections of economic stability are more conservative at 2.9% in 2024, 2% in 2025, and 2.1% 2026-2029. [Statista]
- Bond debt service. Principal and Interest on bond related activity is projected to represent a “safe” operational margin--13.75% in FY27, 14.66% in FY28, and 11.71% in FY29. The inaugural year of bond debt (FY27) is “softened” by providing an interest only funding. John Hancock plans to use redirected funding to the capitalization of technology and FF&E requirements, as it did with the current Eagle Mountain facility.

### Other relevant financial and oversight considerations:

- John Hancock Charter School’s Board of Directors has a Purchase Sales Agreement with the owner of an adjacent piece of property, with the intent of locating the Eagle Mountain campus expansion on that 7.3-acre parcel. Lot purchase is for \$180,000/acre. Capital has already been secured through the capital management group holding the Eagle Mountain facility agreement. Capital associated with this purchase has been secured at normal market rates.
- John Hancock Charter School’s Board has released a Request for Proposal through Utah State Purchasing consistent with state procurement laws, through the U3P system (formerly SciQuest), in order to secure a Construction Project Manager. For the FY27 expansion.
- The construction of a new 25,000 square feet facility will house the additional 400 student body. 5,000 additional square feet will be added to the existing Eagle Mountain facility (i.e. Cafeteria and Stage/Storage).
- John Hancock Charter School has worked closely through this expansion campus application process with expert finance consultants to assure the viability of the school before, during, and following the opening of the new facility.
- Finance and bonding professionals assure John Hancock Charter School’s Governing Board that its current financial position is “solid” and well positioned to secure a good bond rate upon approval of the expansion application.