

Quest Academy

Board Meeting Agenda

Date: October 21, 2025

Time: 6:00PM

Teleconference: <https://us06web.zoom.us/j/89132562367>



The mission of Quest Academy is to provide students a challenging, technology rich environment, enabling young citizens to become leaders prepared for the challenges of an evolving global community.

Agenda

Board Priorities

State Accountability

Fiscally Sound

Personalized Learning/Individualized Learning

Brand Awareness

CALL TO ORDER – Steve Reeve

PUBLIC COMMENT

CONSENT ITEMS

- September 23, 2025, Electronic Board Meeting

REPORTS

- Administration
 - State of the School
 - Health Department Stats (STI data, DCFS—child abuse, teen birthrate, pornography)

VOTING & DISCUSSION ITEMS

- Discuss RFP submitted by Red Apple
- Vote to award RFP
- Discuss curriculum and materials for Maturation/Sex Education
- Vote to approve curriculum and materials approved by our Curriculum Materials Review Committee

CALENDARING

- Strategy Planning Session, Thursday, November 20th at 6:00 PM.
- Next Board Meeting December 9, 2025, at 6:00 PM via Zoom.

ADJOURN

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-731-9859 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.

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Quest Academy

Board Meeting Minutes

Date: September 23, 2025

Time: 6:00PM

Location: <https://academicawest.zoom.us/j/86483914538>

In Attendance: Nicole Boucher, Brittney Hale, Stacee Phillips, Brett Greenwell

Excused: Steven Reeve, Shawn Mielhke

Others in Attendance: Dave Bullock, Angelee Spader, Gabe Clark, Caleb Crump, Nicole Jones, Hannah Jones

The mission of Quest Academy is to provide students a challenging, technology rich environment, enabling young citizens to become leaders prepared for the challenges of an evolving global community.

Minutes

Board Priorities

State Accountability

Fiscally Sound

Personalized Learning/Individualized Learning

Brand Awareness

CALL TO ORDER – Brittney Hale called the meeting to order at 6:01 PM.

PUBLIC COMMENT

There were no public comments.

CONSENT ITEMS

- August 12, 2025, Board Meeting & Closed Session Minutes

Stacee Phillips made a motion to approve the August 12th Board Meeting and Closed Session Minutes. Nicole Boucher seconded. The motion passed unanimously. The votes were as follows: Brett Greenwell, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacee Phillips, Aye.

REPORTS

- Administration

Dave Bullock said the cookie bill fundraiser is starting on Friday. 1,004 students are enrolled at the school. The theme for the school this year is “the power within”. Mastery connect will allow parents to access grades k-9. Parent teacher conferences are coming up in October. There will also be a Halloween parade.

- Financial Report

Brett Greenwell said that the administration has always done a good job of staying within budget and forecast. The board reviewed the financial statements provided. Caleb Crump added that there was a one percent decrease in PTIF interest. The audit of the quest financial statements is almost complete.

VOTING & DISCUSSION ITEMS

- Approve LEA Licenses

Dave Bullock explained the need for the LEA Specific Licenses in both the elementary and junior high. There were no questions or concerns from the board.

Brett Greenwell made a motion to approve the LEA Specific Licenses. Nicole Boucher seconded. The motion passed unanimously. The votes were as follows: Brett Greenwell, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacee Phillips, Aye.

- EISP Invoice

Dave Bullock explained that a professional development professional will be coming to the school to conduct trainings with teachers and administration. Board members discussed the length of time, and what the training includes. There was no further discussion.

Stacee Phillips made a motion to approve the Curriculum Associates Invoice not to exceed \$36,000. Nicole Boucher seconded. The motion passed unanimously. The votes were as follows: Brett Greenwell, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacee Phillips, Aye.

- Amended Child Abuse and Neglect Reporting Policy
- New Hotline Complaint Policy
- Amended Administration of Medication in School Policy

The board reviewed the policies and discussed any changes made. There were no questions about the new policy and amendments.

Brett Greenwell made a motion to approve the Amended Child Abuse and Neglect Reporting Policy, Hotline Complaint Policy, and Amended Administration of Medication in School Policy. Stacee Phillips seconded. The motion passed unanimously. The votes were as follows: Brett Greenwell, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacee Phillips, Aye.

CALENDARING

The next board meeting will be held Thursday, November 20th at 6:00 PM at Quest Academy.

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.

ADJOURN

At 6:25 PM Stacee Phillips made a motion to Adjourn. Brett Greenwell seconded. The motion passed unanimously. The votes were as follows: Brett Greenwell, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacee Phillips, Aye.

DRAFT

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.

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QA Board Meeting Minutes 9-23-2025
Approved:

Quest Academy
REQUEST FOR PROPOSAL (RFP)
Charter School Service Provider

*Dates in this RFP have been updated due to the school's current service provider wanting a transition date sooner than January 1, 2026.

Address: 4862 W 4000 S, West Haven, UT 84401

Website: questac.org

Contacts: Dave Bullock, Steve Reeves, Brent Greenwell

SECTION I — SELECTION SCHEDULE

Notice of RFP	October 8–15, 2025
Proposal Deadline	October 15, 2025 — 5:00 PM (MT)
Proposal Opening	October 16, 2025
Review Period Begins	October 16, 2025
Tentative Contract Award Date	October 21, 2025
Start of Services	October 22, 2025
Contract Duration	Up to 5 years

SECTION II — INTRODUCTION

Quest Academy, a public charter school serving grades K–9, is requesting proposals for a Charter School Service Provider beginning October 22, 2026.

Quest Academy is a Local Education Agency (LEA) committed to:

- Compliance with state and federal requirements
- Financial stability and transparency
- Educational excellence in service of students and families

The purpose of this RFP is to identify a provider with a proven track record supporting Utah charter schools that seeks services in areas such as finance, compliance, human resources, operations, legal support, special programs, and other administrative functions.

The Governing Board will award the contract to the offeror whose proposal is determined to be most advantageous to Quest Academy, considering cost and evaluation criteria outlined herein.

SECTION III — PROPOSAL INFORMATION

Only one proposal may be submitted per offeror. Each proposal will be evaluated by a committee appointed by the Quest Academy Governing Board. Discussions may be conducted with offerors for clarification and completeness. Quest Academy is not obligated to accept any proposal and reserves the right to cancel this RFP at any time.

SECTION IV — PROPOSAL REQUIREMENTS

Each proposal must include a cover letter containing:

- Intent to provide requested services
- Legal company name
- Company address
- Contact name, phone, and email
- Company website
- Signature of an authorized representative (with title)
- Date of submission

Proposal Format:

- Submit proposals in PDF format via email.
- Provide cost information as a separate, clearly marked PDF.
- Email subject line must read: 'Proposal for Quest Academy Charter School Service Provider'.

Fraud Disclosure:

All proposals must disclose any incidents of fraud involving the company, including the outcome of any investigations and internal controls implemented to prevent recurrence.

SECTION V — SPECIFICATIONS

A. Scope of Services:

1. Accounting:

- Accounts payable/receivable, invoicing, coding, QuickBooks
- Bank & bond accounts, fraud monitoring, vendor management
- Audits, reconciliations

2. Payroll & HR:

- Payroll processing, benefits administration, HR compliance
- Taxes, employee handbooks

3. Compliance & Grants:

- AFR/APR, UPEFS, federal and state grant compliance (Title I, II, IV, STEM)
- School LAND Trust, DMI reporting, IRS Form 990, external audits

4. Financial Oversight:

- Budget development, financial planning, strategic reporting
- Audit preparation, presentations to Governing Board

5. School Operations:

- Facility management support
- Records management
- Board meeting preparation and administrative consulting

6. Educational & Legal Support:

- Guidance on academic programming, curriculum compliance, and assessment reporting
- Support for special education (SPED), Section 504, English Learners, and Title program compliance
- Policy development, review, and updates aligned to state/federal requirements
- Access to legal expertise for charter school governance, contract review, policy drafting, and dispute resolution

B. Experience & Qualifications:

- Minimum 5 years' experience in charter school services
- Licensed and insured in Utah
- Proven client satisfaction with at least 3 references

SECTION VI — EVALUATION CRITERIA

Non-Cost Criteria (50 Points):

- Scope of Services (15 points)
- Experience & Qualifications (15 points)
- References (10 points)
- Proposal Format & Compliance (10 points)

Cost Criteria (50 Points):

- Cost Proposal (breakdown by service area)
- If a service is not offered, indicate 'N/A'

Total Possible Points: 100

Cost information will be evaluated independently.

SUBMITTAL INSTRUCTIONS

All proposals must be submitted to:

Steve Reeves

Email: sreeve@questac.org

Deadline: October 15, 2025 — 5:00 PM (Mountain Time)

Submit two PDFs:

1. Non-Cost Proposal
2. Cost Proposal (clearly marked)

Late or incomplete proposals may not be considered.



Cost Proposal

Beginning November 1, 2025 (or when services begin), Red Apple will charge a monthly fee of \$9,400 per month to Quest Academy. Our fee is not structured off of a per pupil amount, or broken out by department, as outlined in the RFP. Our monthly fee includes all of our services, which are outlined in the narrative portion of our response. As mentioned in our narrative response, we do not provide services for School Operations or Educational and Legal Support. Our hope is that the fee we have quoted would allow the school to customize those services to your specific needs, as those needs arise.

Additionally, Red Apple will charge a one-time fee of \$15,000 to switch service over from your current services provider to Red Apple. This fee allows us to put the resources necessary into the transition, so that it can happen smoothly and quickly.

Beginning July 1, 2026, and each subsequent year thereafter, the monthly service fee shall be increased by the **lesser** of 3% or the % increase in the state student education funding (calculated as the % increase in school funding from LRF & WPU). Red Apple reserves the right to waive any escalation.

Our agreement with the school would automatically renew each July 1, for 5 years. Either party has the right to cancel the agreement, at any time, with a written 60 day notice.



Dear Quest Academy School Board,

Thank you for the opportunity to bid on business services for your school. Being a small part of the charter school movement and seeing great schools like yours grow, is one of the most fulfilling things about our job. Many of us at Red Apple are from West Haven. We've had an up-close look at your school since you opened. We have neighbors, friends and family who have attended your school. You've made a great impact on the community we live in, and for that we thank you.

Attached is our response to your school's RFP. We have included the services that we provide, as well as some references for you to reach out to. If you have any questions at all, please feel free to reach out to me anytime. I've included my email, and phone number below.

We look forward to your response!

Sincerely,

A handwritten signature in black ink that reads "Jeff Biesinger".

Jeff Biesinger
Director of Marketing
Red Apple Financial
289 24th Street Suite 100
Ogden, UT 84401
801-690-1899
Submission Date: October 14, 2025
www.redapplefinance.com
jeff@redapplefinance.com

Introduction to Red Apple Financial

Red Apple Financial has been serving charter schools since 2004, with a current portfolio of nearly 50 schools across Utah, Idaho, and Nevada, most of which are located in Utah. From the beginning, we made a deliberate decision to specialize in business services tailored specifically for charter schools. Our goal has always been to provide high-quality, cost-effective financial support that empowers schools to maintain the autonomy that charter models were built to preserve.

Rather than operate as a full-service management company, we chose to focus on what we do best, financial and business operations, so that school leaders and educators can dedicate their time and energy to instruction, culture, and student success. This targeted approach has consistently enabled our partner schools to reinvest time and savings into programs that directly benefit their students and staff.

If given the opportunity to work with your school, we are confident in our ability to provide the same high level of service and cost savings, allowing you to strengthen and expand the programs that matter most.

Fraud Disclosure

Red Apple has never committed fraud, nor have we ever been accused of, or investigated for fraud. We take several precautions to ensure that this does not happen. We would be happy to discuss our safety measures in more detail, but here are a few key points that help ensure that it does not happen:

- We are not signers on your bank accounts. We do not have the ability to spend your money. This responsibility should remain at the school level
- Separation of duties. When a bill needs to be paid, a dedicated Red Apple Clerk will enter the information into our online bill payment system. Once entered into the system, your dedicated business manager will review the information and check to see if the information is accurate. Once that is done, they will approve the bill. It will then be sent to the school for the school's approval. The school will also look over the invoice, and payment to check accuracy and legitimacy. Once that is done, the school will approve the payment. Once the school approves the payment, it will come back to the business manager to pay it. No one person has the ability to create a payment, approve the payment, and pay the payment. Additionally, each time the bill is entered in, or approved by someone, it is time stamped with the person's name, date, and time
- Monthly reconciliations for each account are also done. The reconciliation is done by the clerk and sent to the Board Treasurer for review

Scope of Services

Per the RFP, we have outlined the services we provide below, in accordance with the duties outlined in the RFP.

- **Accounting**

- ✓ Accounts Payable – yes
- ✓ Accounts Receivable – yes
- ✓ Invoicing - (we would like to discuss this further, to provide clarification. If the school sends an occasional invoice, we are happy to help with this. However, if the school is billing parents or customers regularly for some type of service, this would more than likely need to be handled by the school's front office staff)
- ✓ Coding – yes
- ✓ Quickbooks – yes
- ✓ Bank Accounts – yes
- ✓ Bond Accounts – yes
- ✓ Fraud Monitoring – yes
- ✓ Vendor Management – yes
- ✓ Audits – yes
- ✓ Reconciliations – yes

- **Payroll and HR**

- ✓ Payroll Processing – yes
- ✓ Benefits Administration – yes
- ✓ HR Compliance – yes
- ✓ Taxes – yes
- ✓ Employee Handbooks – yes, we can assist the school in this area

- **Compliance and Grants**

- ✓ AFR/APR – yes
- ✓ UPEFS – we will upload your required reports to UPEFS, and the school will certify
- ✓ Federal and State Grant Compliance – yes
- ✓ School Land Trus – yes
- ✓ DMI Reporting – we can help assist if needed
- ✓ IRS Form 990 – your auditor does this, but we will provide them with the information they need to get it completed
- ✓ External Audits – yes

- **Financial Oversight**

- ✓ Budget Development – yes
- ✓ Financial Planning – yes
- ✓ Strategic Reporting – yes
- ✓ Audit Preparation – yes
- ✓ Presentations to Governing Board – yes

There are additional tasks we will handle for the school, such as handling the duties of the Creator within Utah Grants, Transparency Website Uploads, and other compliance tasks. We just wanted to address each of the duties outlined in the RFP itself.

Regarding the rest of the services outline in the RFP, including School Operations and Educational and Legal Support, we do not offer these services. As mentioned earlier in the RFP, we have built our company to focus specifically on the financial needs and services for charter schools. Our goal is to provide those services at a far less rate than what Quest has been paying, so that you can customize the remaining services to fit your schools' specific needs. That said, we will attend all of your board meetings and can offer our advice and expertise on several matters, if your school would like us to. We work with nearly 50 charter schools and have seen other schools go through most of the experiences you will also face. We are happy to share what other schools have done to overcome obstacles that you may encounter.

Experience and Qualifications

- **Minimum 5 years' experience with charter school services** – As mentioned earlier in the RFP, Red Apple has been in business for over 20 years. We are the largest business services provider in the State of Utah. All of our business managers are well versed in this industry. In addition to the State trainings, we have monthly trainings within Red Apple in order to keep all of our business managers caught up to speed with the ever changing needs of charter schools
- **Licensed and Insured in Utah** – Yes, Red Apple is licensed and insured in the State of Utah
- **References** –
 - Kim Goates – Director of Canyon Academy – 801-598-2605
kim.goates@canyongrove.com
 - Simon Raubenheimer – Director of Endeavor Hall – 801-888-7273
simon.raubenheimer@endeavorhall.org
 - Cindy Phillips – Former member of the SCSB, and Charter School Consultant – 801-759-9374 cynthiakimballphillips@gmail.com

- Angela Fanjul – Director of Dual Immersion Academy – 801-971-9377 angela.fanjul@diacharter.org
- Stephanie Colson – Director of Ranches Academy – 801-822-9997 scolson@theranchesacademy.com

Cost Proposal

As requested in the RFP, the cost proposal is provided in a separate document.



October 14, 2025

Date

Quest Academy — Evaluation Summary for School Service Provider

This document provides Quest Academy's balanced scoring and analysis of Red Apple Financial's response to the Request for Proposal (RFP) for Charter School Service Provider. Scoring is based on the criteria outlined in Section VI of the RFP, considering both non-cost and cost factors. Notes summarize key strengths and gaps.

SECTION A — NON-COST CRITERIA (50 Points)

Category	Max Points	Score	Notes
Scope of Services	15		
Experience & Qualifications	15		
References	10		
Proposal Format & Compliance	10		

Subtotal A — Non-Cost Points: ___/ 50

SECTION B — COST CRITERIA (50 Points)

Category	Max Points	Score	Notes
Cost Proposal	50		

Subtotal B — Cost Points: ___/ 50

TOTAL SCORE

Overall Total: ___ / 100

Summary Analysis

Materials/Curricula List and Guest Speakers

Please list or insert link to view the materials, media, and guest speakers approved relating to maturation/sex education instruction in any course



USBE recommended materials and/or curricula found at <https://usbe.midaseducation.com/rims>



Our LEA uses the following materials recommended by the Curriculum Materials Review Committee, but not by the State Instructional Materials Commission.

If needed, attach a link or a list of materials to this document.

Please fill out the sections below as necessary.

Curriculum used:

Prentice Hall Health Text Book; Contraceptive Presentation for Schools; Human Reproduction Presentation;
Department of Health statistics and FAQ

Media used:

Procter & Gamble Always Changing and Growing Up (Presented by School Nurse, Weber District)
<https://wsd.net/departments/support/nursing/maturation>

Approved Guest Speakers:

School Nurse