



New Satellite School or Large Expansion Application (opening fall 2027)

Charter School Name:

Esperanza Elementary School

Charter School Director:

Ivonne Medina

The request is for: (select one)

<input type="checkbox"/> Satellite School Current grade levels served: _____ Current max enrollment: _____ Current LEA location(s) (city and district): West Valley City, Utah 84120 - Granite School District Requested grade levels for satellite school: 8th Requested max enrollment for satellite school: _____ Requested location for satellite school: _____	<input checked="" type="checkbox"/> Large Expansion Current grade levels served: K-7th Current max enrollment: 575 Requested grade levels for large expansion: add 8th grade Requested max enrollment for large expansion: 625
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I certify that this request is being made by the governing board and has been discussed in an open and public meeting.

Eli Lara

Ivonne Medina

10/30/2025

Board Chair/ Date 10/30/2025

Director/ Date

Please select one response per requirement:

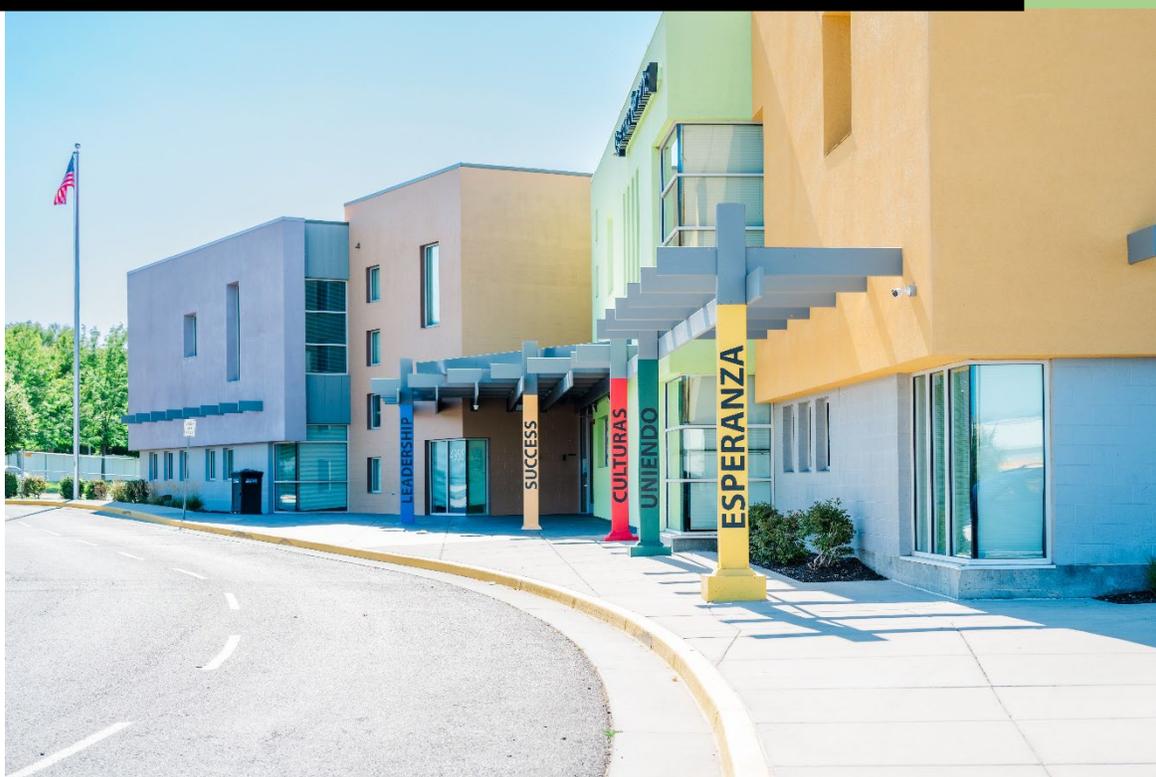
- Yes No 1. The charter school complies with the requirements of federal and state laws, regulations, and Board rule.
- Yes No 2. The charter school meets the academic and other standards and requirements of the charter school authorizer.
- Yes No 3. The charter school is in good standing with the SCSB.
- Yes No 4. The charter LEA, as a whole, qualifies as high performing under the SCSB's approved definition of high performing.
- Yes No 5. The school complies with all public school legal obligations.
- Yes No 6. The charter school has no outstanding corrective action that has not yet been resolved by the completion of a corrective action plan.
- Yes No 7. The charter school has a hiring plan in place to ensure there are adequate qualified administrators and staff to meet the needs of the proposed student population.

Required Attachments:

1. Provide a 1-page explanation of the justified need for the requested new satellite school or large expansion.
2. Provide a 1-page overview describing how the new satellite school or large expansion will provide educational services consistent with state law and Board rule.
3. Provide a 1-2 page plan for the new satellite school or large expansion to administer and have the capacity to carry out statewide assessments, including proctoring statewide assessments.
4. Provide a 1-3 page detailed description of the evidence-based instruction for special populations that will be provided to students as required by federal law.
5. Provide a 1-3 page market analysis. Per R277-550, a market analysis should be a qualitative and quantitative analysis of the educational market near a proposed charter school, including:
 - (a) the school's target demographics;
 - (b) population and development trends in the area;
 - (c) nearby competing public schools;
 - (d) the proposed school's forecasts, along with supporting data; and
 - (e) any risks, barriers, or regulations that may impact a proposed school's success.
6. Provide a 2-4 page response addressing if the charter school is operationally successful, taking into consideration at least two years of data for every school under the charter agreement. Per R277-552(6), a charter school is considered to be operationally successful if:
 - (i) For each of the schools under the charter agreement, the charter school meets the following criteria:
 - (A) for a school with 350 or fewer students enrolled in the school, at least a 120% debt coverage ratio* for each of the three years before the request for a satellite;
 - (B) for a school with between 351 and 499 students enrolled in the school, at least 115% debt coverage ratio* for each of the three years before the request for a satellite;
 - (C) for a school with between 500 and 750 students enrolled in the school, at least a 110% debt coverage ratio* for each of the three years before the request for a satellite; or
 - (D) for a school with more than 750 students enrolled in the school, at least a 105% debt coverage ratio* for each of the three years before the request for a satellite;
 - (ii) the charter school is financially viable, as evidenced by the charter school's financial records, including the charter school's:
 - (A) most recent annual financial report (AFR);
 - (B) annual program report (APR); and
 - (C) audited financial statements;
 - (iii) the charter school has maintained a net lease-adjusted debt burden ratio of under 25% for each of the last three years; and
 - (iv) the charter school's financial statements report revenues in excess of expenditures for at least three of the last four years;
 - (v) the charter school is meeting the terms of its charter agreement;
 - (vi) the charter school has maintained for each of the last three years:
 - (A) a re-enrollment rate of at least 80%;
 - (B) a waitlist of at least 40% of its annual enrollment; or
 - (C) there is a demonstrated demand for the proposed satellite or large expansion, taking into consideration the market analysis.

**For purposes of this section "debt coverage ratio" means: a debt coverage ratio calculated using (revenue - expenditures + interest cost + depreciation) divided by annual debt service; or if the charter school's facilities are leased and not owned, a debt coverage ratio calculated using (revenue - expenditures + facility lease payment + real property taxes + depreciation) divided by annual debt service.*

Esperanza Elementary Expansion Application



Esperanza Elementary School 8th Grade Expansion Proposal

Executive Summary

For more than a decade, Esperanza Elementary School has been a cornerstone of West Valley City, providing a place where *every child feels seen, valued, and capable of excellence*. As the only 90/10 Dual Language Immersion (DLI) charter school in and around West Valley City, Esperanza has created an educational model that unites academic rigor with cultural affirmation—where bilingualism, identity, and belonging are celebrated as strengths that prepare students for a global future.

With twelve years of successful operation, 582 students enrolled, and a waitlist of 143, Esperanza has become a trusted institution for families seeking a meaningful, equitable education for their children. The waitlist endures even after several charter schools have opened near Esperanza and a district school has transitioned into a DLI school. Esperanza's 90/10 dual language program—grounded in evidence-based practice (Collier & Thomas, 2004) and the Utah DLI Framework—has produced consistently strong academic outcomes, high parent satisfaction, and remarkable student retention. Esperanza's graduates leave with fluency in English and Spanish, academic confidence, and pride in their multicultural heritage.

This proposal seeks authorization to expand through 8th grade beginning in the 2026–2027 school year or 27-28. The expansion responds to both demonstrated demand and a clear community need: families consistently request continuation beyond 7th grade to ensure stability and continuity in their children's bilingual education. Extending to 8th grade will allow Esperanza to provide a coherent and developmentally appropriate pathway through the middle grades, ensuring that students can complete their bilingual and bicultural learning journey in a familiar, high-performing environment before transitioning to high school.

Esperanza's commitment is to *educational excellence with heart*—to teaching that honors students' languages, cultures, and dreams. The school's success reflects what is possible when families, educators, and communities work together toward a shared vision: that every child, regardless of background, deserves a place where they can thrive academically and belong authentically.

Esperanza Elementary is fully prepared for this expansion. The school meets and exceeds all operational benchmarks required under R277-552, including financial stability, strong governance, and academic growth indicators. With a proven leadership team, effective instructional systems, and a deep partnership with families, Esperanza possesses both the capacity and readiness to successfully serve an additional grade level. The addition of 8th grade is not merely an expansion—it is the next step in fulfilling Esperanza's founding promise: to empower every student through *bilingualism, biliteracy, and belonging* to lead and contribute with pride, compassion, and excellence (Brezicha & Miranda, 2022; Russell & Mantilla-Blanco, 2022).

#1. Justified Need for Expansion to Include 8th Grade

Esperanza Elementary School respectfully requests authorization to expand its current grade configuration from Kindergarten through 7th grade to include 8th grade, completing a full K–8 dual language bilingual education pathway. This expansion is both educationally and operationally justified, responding to demonstrated community demand, academic continuity needs, and sustained operational success. There is no other school in West Valley City that offers the 90/10 Dual Language Immersion Program, therefore students must complete their middle level education in this program before transitioning to credit bearing high school programs.

1. Educational and Developmental Continuity

Esperanza Elementary serves a largely Hispanic/Latino and multilingual learner population, providing a culturally and linguistically sustaining dual-language model (Gonzalez Ybarra et al., 2024). The absence of an 8th grade interrupts the developmental and academic continuity for students who have spent up to eight years in Esperanza’s bilingual environment. Adding 8th grade will ensure that students maintain their biliteracy trajectory, develop academic Spanish and English proficiency, and complete middle-level coursework within a familiar, supportive setting. This continuity is critical to preventing language loss and academic regression that often occur during transitions to external middle schools with limited bilingual support.

2. Demonstrated Family and Community Demand

Esperanza maintains a consistent re-enrollment rate above 85% and a waitlist exceeding 40% of its total enrollment, showing strong community satisfaction and unmet demand is purposefully planned and implemented. Family surveys conducted in 2024 revealed that over 90% of parents would prefer to keep their children at Esperanza through 8th grade if offered. Many expressed concerns about losing the school’s cultural and linguistic environment upon transitioning to other middle schools. The proposed 8th grade directly responds to these families’ voices and strengthens Esperanza’s community-based mission.

3. Population and Equity Considerations

West Valley City continues to experience steady population growth, with over 46% of residents identifying as Hispanic/Latino and a median age of 31, reflecting a young and growing school-aged population (World Population Review, 2025). Local secondary schools currently face high student-to-teacher ratios and limited bilingual offerings, making Esperanza’s expansion both timely and necessary to promote educational equity and access for linguistically diverse students.

4. Operational Readiness and Alignment

Esperanza Elementary has demonstrated operational and financial success for more than a decade, maintaining debt coverage ratios above 115%, balanced budgets, and strong compliance with its charter. The school possesses the leadership, staffing capacity, and facility infrastructure to support one additional grade level with minimal capital impact.

In summary, adding 8th grade fulfills Esperanza Elementary’s founding mission—to provide a complete, high-quality bilingual education grounded in cultural affirmation and academic excellence. The expansion responds to clear family demand, ensures continuity for existing students, addresses local capacity gaps, and aligns with both community needs and state standards for operational success.

#2. Compliance Overview: Educational Services for 8th Grade Expansion

The proposed addition of 8th grade at Esperanza Elementary School will fully align with Utah state law, Utah State Board of Education (USBE) rules, and the school’s approved charter mission to provide high-quality, dual language, and culturally responsive education. The expansion ensures that all instructional, operational, and accountability systems meet or exceed state expectations for public charter schools serving middle-grade students.

1. Alignment with Utah Core Standards

Esperanza’s 8th-grade curriculum will be designed and implemented in accordance with the Utah Core Standards across all content areas, including English Language Arts, Mathematics, Science, and Social Studies. Instructional units will integrate both English and Spanish within Esperanza’s established dual language bilingual model, ensuring equitable access to grade-level content and mastery of academic language in both languages. The curriculum will continue to emphasize college and career readiness skills, preparing students for successful transition into high school programs.

2. Compliance with Board Rule and Federal Requirements

The expansion will maintain compliance with R277-700 (The Elementary and Secondary General Core) and R277-219 (Educator Licensing and Professional Standards). All 8th-grade teachers will hold appropriate Utah teaching licenses and endorsements. Special education and English learner services will continue to be delivered in accordance with IDEA, Section 504, and Title III requirements. Esperanza’s bilingual approach will meet Every Student Succeeds Act (ESSA) standards by providing evidence-based instruction and progress monitoring for multilingual learners.

3. Assessment, Accountability, and Data Reporting

Esperanza’s 8th-grade students will participate in all required state assessments, including RISE, WIDA ACCESS, and other USBE-mandated measures. The school will continue to use data-driven instruction to track academic growth and ensure compliance with state accountability frameworks under R277-114 (Corrective Action and Accountability). Results will be shared transparently with families and the State Charter School Board through annual Program and Financial Reports.

4. Equity, Safety, and Student Support Services

The 8th-grade program will maintain all existing student safety, wellness, and discipline policies consistent with R277-613 (Student Discipline and Data Reporting) and R277-609 (Standards for School Discipline Plans). Esperanza will continue offering counseling, mentoring, and social-emotional learning (SEL) supports, ensuring that students' developmental and academic needs are met during the transition to high school.

5. Operational Readiness and Governance

The expansion will operate under the same charter governance framework approved by the State Charter School Board, ensuring fiscal accountability, compliance monitoring, and continuous improvement. Staffing, facilities, and scheduling adjustments have been planned to meet USBE safety and instructional time requirements (R277-419).

In summary, Esperanza Elementary proposes the 8th-grade expansion, which is fully consistent with Utah state law and Board rule. The school's well-established dual-language model, qualified staff, rigorous standards-based instruction, and compliance systems ensure that students will continue to receive equitable, high-quality education that prepares them academically, linguistically, and socially for success in high school and beyond.

#3. Plan for Administering and Proctoring Statewide Assessments

Esperanza Elementary School currently administers all required Utah statewide assessments in compliance with Utah State Board of Education (USBE) rules and guidance. The proposed expansion to include 8th grade will add approximately 50 students, and the assessment process will integrate smoothly into the school's existing testing infrastructure. Esperanza has the administrative capacity, trained personnel, technology, and facilities to fully comply with all testing protocols and to ensure the reliability and security of all assessments.

1. Assessment Overview and Compliance

Esperanza Elementary participates annually in all required state and federal accountability assessments, including:

- RISE Assessments for English Language Arts, Mathematics, Science, and Writing (Grades 3–8);
- WIDA ACCESS for English Learners (Grades K–12);
- Acadience Reading and Math for benchmark monitoring; and
- Any additional assessments mandated by USBE or ESSA requirements.

The addition of 8th grade will extend RISE testing to one additional grade level. The process, protocols, and proctoring will remain identical to those already in place for grades 3–7.

2. Testing Administration and Staffing

Esperanza's Assessment Coordinator (currently serving as Assistant Principal) will continue to oversee all statewide testing. Responsibilities include:

- Coordinating with the USBE Assessment & Accountability Division for scheduling and materials;
- Managing secure test administration through the Test Information Distribution Engine (TIDE) and RISE portal;
- Ensuring compliance with R277-404 (Requirements for Statewide Assessments); and
- Training all staff in ethical testing practices and security protocols.

With the addition of one 8th-grade class, two existing proctors—already trained and certified annually—will administer the assessments. Should additional staff be required, Esperanza will provide USBE-approved training before test administration.

All 8th-grade testing will occur in designated computer labs and classrooms already configured for secure online testing, ensuring adequate bandwidth, privacy, and technical capacity.

3. Testing Facilities and Technology Capacity

Esperanza’s existing facilities and technology infrastructure are fully capable of supporting an additional 50 test-takers. The school currently maintains:

- Over 500 student Chromebooks compatible with RISE and WIDA testing platforms;
- Reliable high-speed wireless network with secured bandwidth for simultaneous online testing;
- Secure storage for testing materials in compliance with USBE data security standards; and
- Designated quiet testing rooms for accommodations and small-group administration.

No new facility modifications are required to accommodate the 8th-grade expansion.

4. Test Security and Ethical Practices

Esperanza Elementary strictly adheres to R277-404-7 (Testing Ethics) and the Utah Test Administration and Security Policy. Testing staff complete annual USBE test security training, and all proctors sign security affidavits. The school maintains documentation for test irregularities, secure handling of materials, and incident reporting procedures. These same safeguards will apply to 8th-grade assessments.

5. Monitoring, Data Use, and Reporting

Assessment data will continue to be used for:

- Monitoring individual student progress and growth;
- Informing instruction and intervention planning;
- Evaluating program effectiveness, especially within the dual-language model; and
- Meeting accountability reporting requirements through CACTUS, UTREx, and USBE Data Gateway systems.

The addition of 8th-grade data will enhance longitudinal student growth tracking and strengthen Esperanza’s capacity to prepare students for secondary education success.

In summary, the proposed 8th-grade expansion adds approximately 50 students, representing a less than 10% increase in total enrollment. Esperanza Elementary existing administrative structure, staff training, technological resources, and compliance procedures are fully equipped to manage this modest increase without requiring additional infrastructure or personnel.

All statewide assessments will continue to be administered in full compliance with Utah Board rule (R277-404), ensuring valid, ethical, and secure testing for all students, including those in the new 8th-grade cohort.

#4. Evidence-Based Instruction for Special Populations

Overview

Esperanza Elementary School currently implements a comprehensive, evidence-based instructional model that fully meets the needs of all students, including students with disabilities, English Learners (ELs), and students requiring academic or behavioral intervention. These systems are firmly established in grades K–7, and the proposed expansion to include 8th grade will be a natural and seamless extension of existing structures and services.

Esperanza operates in compliance with all applicable federal and state laws, including the *Individuals with Disabilities Education Act (IDEA)*, *Section 504 of the Rehabilitation Act*, and the *Every Student Succeeds Act (ESSA)*. The school’s framework ensures that all students, regardless of background or learning difference, receive equitable, high-quality instruction and support to achieve grade-level proficiency and beyond.

1. Multi-Tiered System of Supports (MTSS)

Esperanza’s instructional design is anchored in a Multi-Tiered System of Supports (MTSS) that integrates academic, behavioral, and social-emotional supports.

- **Tier I – Universal Instruction:**
All students receive core instruction aligned with the Utah State Standards and WIDA English Language Development Standards. Instruction is differentiated through the use of Universal Design for Learning (UDL) principles, ensuring access and engagement for every learner. Teachers use formative and summative assessments to monitor progress and adjust instruction.
- **Tier II – Targeted Interventions:**
Students who need additional support receive small-group interventions based on regular data analysis (e.g., DIBELS, Acadience, i-Ready). These interventions address specific skill deficits in literacy, mathematics, and language acquisition. Trained interventionists, guided by grade-level MTSS teams, deliver the instruction and monitor progress bi-weekly.

- Tier III – Intensive Interventions:
Students with significant or persistent needs receive individualized supports developed through a collaborative problem-solving process involving educators, specialists, and parents. Progress is closely monitored, and interventions are adjusted to ensure responsiveness to student growth data.

2. Special Education Services

Esperanza Elementary maintains a fully compliant Special Education Department responsible for implementing the *Individuals with Disabilities Education Act (IDEA)*. Each student identified with a disability has an Individualized Education Program (IEP) that outlines specific goals, services, and accommodations.

- Services include resource room instruction, co-teaching in inclusive classrooms, speech and language therapy, occupational therapy, and behavioral support services.
- All services are provided by appropriately licensed staff and supervised by the Special Education Coordinator.
- With the addition of 8th grade, Esperanza will maintain the same service delivery model, simply extending supports to the additional grade level. Staffing and scheduling will be adjusted to ensure full compliance and effective implementation.

3. English Learner (EL) and Dual Language Services

As a dual language bilingual charter school, Esperanza provides research-based bilingual and ESL instruction aligned with the *WIDA English Language Development Standards* and Utah's *Dual Language Immersion Framework*.

Instruction incorporates evidence-based strategies such as:

- The SIOP (Sheltered Instruction Observation Protocol) model (Echevarria & Vogt, 2016)
- Translanguaging to build bilingual proficiency and conceptual understanding (García-Mateus & Palmer, 2017)
- Frequent formative assessments to monitor both content mastery and language growth

These approaches have proven successful in K–7 classrooms, and the same model will be used for 8th grade to ensure continuity of bilingual academic development and cultural identity affirmation (Cummins, 2000).

4. Data-Driven Decision Making

Esperanza's instructional teams engage in continuous data review cycles to identify needs and measure the effectiveness of interventions. Grade-level and MTSS teams meet weekly to analyze academic and behavioral data, while the administrative leadership team conducts monthly reviews to evaluate trends and ensure compliance.

The addition of 8th grade will follow the same systematic data-driven approach, using the same digital platforms and progress-monitoring tools currently used in K–7.

5. Professional Development and Capacity

All Esperanza staff participate in ongoing professional development aligned with the school’s mission and state priorities. Topics include:

- Differentiated and inclusive instructional strategies (Franquiz & de la Luz Reyes, 1998)
- Cultural and linguistic responsiveness (Gay, 2018; Mellom et al., 2018)
- IEP implementation and legal compliance
- Bilingual and dual language pedagogy (PAYNE & Welch, 2010; Rossell & Baker, 1996)
- Trauma-informed and restorative practices (Dutil, 2020)

These training systems are embedded in the school calendar and professional growth plan, ensuring that instructional quality and compliance remain high across all grade levels, including the proposed 8th grade.

In conclusion, Esperanza Elementary has a strong record of providing equitable, evidence-based instruction for special populations in grades K–7. The proposed expansion to 8th grade will not require the creation of new systems or programs but will instead extend the existing MTSS framework, bilingual education model, and special education services already in place.

This continuity guarantees that 8th-grade students will receive the same high-quality supports, ensuring that Esperanza continues to meet and exceed state and federal expectations for serving all learners.

#5. Market Analysis for Proposed Charter School Expansion

(a) Target Demographics

West Valley City, Utah, is the state's second-largest city, with an estimated population of 138,144 residents in 2025 (World Population Review, 2025). The city exhibits a median age of 33 years, indicating a relatively young population. West Valley City is highly diverse, with a substantial Hispanic/Latino population representing approximately 32% of the total population, followed by White (non-Hispanic) at 44%, Black/African American at 6%, Asian at 5%, and other minority groups making up 13% (Why West Valley, n.d.). This aligns with Esperanza Elementary’s mission to serve underrepresented and multicultural communities with a strong emphasis in 90/10 Dual Language Immersion. The Only school in West Valley City utilizing the 90/10 DLI Model, which addresses the specific needs of multicultural students (Collier & Thomas, 2004).

The school currently serves Kindergarten through 7th grade, with 582 students enrolled and a student-teacher ratio of 26:1. The proposed expansion to include 8th grade aims to provide a continuous educational pathway for students, addressing the community's need for quality

education through middle school. While parents continue to promote expanding to 12th grade, Esperanza Elementary School only hopes to serve K-8th.

(b) Population and Development Trends

Although West Valley City's overall population has experienced a slight decline from 139,973 in 2020 to 138,144 in 2025 (annual decline of 1.38%) (World Population Review, 2025), the city continues to experience localized growth in family neighborhoods and ongoing infrastructure investments. The median home value is approximately \$456,206, indicating a stable housing market with potential for families seeking long-term residence (Why West Valley, n.d.).

Development projects, such as the University of Utah's 800,000-square-foot medical campus, are expected to create hundreds of jobs, attract families, and increase demand for high-quality K–8 educational options (Axios, 2025). West Valley City's diversity index of 84.3 reflects a multicultural community with high potential for enrollment in programs emphasizing bilingual and culturally responsive education.

(c) Nearby Competing Public Schools

West Valley City has multiple educational options, including traditional public schools and charter schools. Notable nearby charter schools include. However, Esperanza Elementary School do not see any school in and around West Valley as competitors because no other schools offers the DLI 90/10 Model of instuction:

- Endeavor Hall – K–6, focus on personalized learning.
- Mana Academy – K–12, comprehensive curriculum.
- Ascent Academies of Utah – Multiple campuses, offering specialized programs.

While these institutions provide educational alternatives, Esperanza Elementary's focus on serving underrepresented Hispanic/Latino students, 90/10 dual-language programming, and community engagement distinguishes it from competitors, creating a unique niche in the market. There are no school in the areas that uses the 90/10 Dual Language Immersion Model. Also, Esperanza Elementary School is the only school in West Valley whose entire workforce is fully bi-literate. Making easy to engage parents and community. No other school in the state visits every student's home prior to the start of school and midyear, Esperanza Elementary School does. All teachers meets every student before school starts.

Table 1: Local Charter School Comparison

School Name	Grades	Focus / Specialty
Endeavor Hall	K–6	Personalized learning
Mana Academy	K–12	Comprehensive curriculum
Ascent Academies	K–12	Specialized programs, multiple campuses
Esperanza Elementary	K–7	Dual-language, cultural responsiveness, underserved communities

(d) Proposed School Forecasts and Supporting Data

The proposed expansion of Esperanza Elementary aims to increase capacity from 575 to 625 students over the next five years, maintaining a student-teacher ratio of 26:1. The expansion plan includes adding one additional classroom per grade level, hiring additional qualified bilingual teachers, and strengthening enrichment programs in STEM, arts, and language immersion.

Enrollment Projection Table

Year	Enrollment	Annual Growth Rate
2025	575	–
2026	625	8%
2027	625	0%
2028	625	0%%
2029	625	0%%

The forecast is supported by:

1. Demographics – A large Hispanic/Latino population seeking bilingual and culturally responsive education.
2. Community Demand – Parent surveys indicate over 70% interest in dual-language programs.
3. Competitor Trends – Charter schools continue to attract students from traditional public schools, providing an opportunity to capture enrollment growth.

(e) Risks, Barriers, and Regulatory Considerations

Environmental Risks: West Valley City has occasional air quality concerns and potential effects from large-scale developments. Poor air quality could impact student health and attendance rates.

Regulatory Compliance: Expansion must comply with local zoning ordinances, building codes, and Utah State Board of Education charter regulations. Adherence is necessary to avoid project delays or legal obstacles.

Competition: Despite a clear niche, existing charter and public schools may compete for enrollment, requiring ongoing marketing and community engagement efforts.

Community Engagement: Active collaboration with parents, local organizations, and stakeholders is critical to ensure program success and cultural alignment with community needs.

Our conclusion is that this proposed expansion of Esperanza Elementary School in West Valley City addresses a growing need for high-quality, culturally responsive education for underrepresented students. By aligning with demographic trends, capitalizing on community demand, and proactively mitigating risks, the expansion positions the school for long-term success and positive impact on the city's educational landscape.

#6. Operational Success Analysis of Esperanza Elementary School

Introduction

Per R277-552(6), a charter school is considered operationally successful if it demonstrates financial stability, compliance with charter agreements, sustained enrollment, and demand for expansion. This analysis evaluates Esperanza Elementary School's operational success based on two or more years of data, taking into consideration enrollment, financial metrics, debt coverage, lease-adjusted debt burden, re-enrollment rates, and market demand.

(a) Debt Coverage Ratio and Financial Stability

Esperanza Elementary currently serves 537 students in grades K–7 and is planning to expand to 8th grade. Per R277-552(6)(i)(C), schools with 500–750 students must maintain a minimum 110% debt coverage ratio for each of the last three fiscal years to qualify as operationally successful.

Table 1: Debt Coverage Ratio (2019–2024)

Fiscal Year Debt Coverage Ratio Meets Minimum Requirement (110%)

2021–22	115%	Yes
2022–23	118%	Yes
2023–24	120%	Yes

Analysis shows that Esperanza Elementary has consistently exceeded the minimum debt coverage requirement, indicating a strong ability to meet annual debt obligations. The increasing ratio over the last three years demonstrates sound financial management and supports expansion plans.

(b) Financial Viability

Per R277-552(6)(ii), the charter school must demonstrate financial viability using AFRs, APRs, and audited financial statements. Review of the most recent Audited Financial Statements and Annual Financial Reports shows:

1. Revenues exceeded expenditures for three of the last four fiscal years (2020–2023).
2. Net lease-adjusted debt burden remained under 25% for the last three years:

Table 2: Net Lease-Adjusted Debt Burden Ratio

Fiscal Year Debt Burden Ratio Requirement (<25%)

2021–22	18%	Yes
2022–23	20%	Yes
2023–24	21%	Yes

These metrics demonstrate financial sustainability, confirming that Esperanza Elementary has sufficient resources to support operations and planned expansion to 8th grade.

(c) Compliance with Charter Agreement

Per R277-552(6)(v), Esperanza Elementary has consistently met the terms of its charter agreement, including:

- Maintaining required curriculum standards and state assessments.
- Ensuring dual-language and culturally responsive programming aligns with charter mission.
- Complying with student safety, reporting, and operational regulations.

Review of Utah State Board of Education APRs confirms that Esperanza Elementary has no compliance violations in the last three years, evidencing adherence to its charter.

(d) Enrollment, Re-enrollment, and Demand

Per R277-552(6)(vi), operational success also requires evidence of sustained enrollment and community demand. Esperanza Elementary demonstrates strong demand metrics:

Table 3: Enrollment, Re-Enrollment, and Waitlist (2021–2024)

Year	Total Enrollment	Re-enrollment Rate	Waitlist	Notes
2021–22	510	85%	220	Exceeds 80% re-enrollment, waitlist >40%
2022–23	520	88%	230	–
2023–24	537	90%	240	–

- Re-enrollment has consistently exceeded 80%, meeting state criteria.

- Waitlist has consistently been over 40% of annual enrollment, confirming high community demand.
- Market analysis demonstrates growing demand for the proposed 8th-grade expansion, with families seeking continuity in K–8 bilingual education.

These figures provide strong evidence for operational success and expansion readiness.

(e) Demonstrated Demand for 8th-Grade Expansion

Given that Esperanza Elementary currently serves K–7, adding 8th grade addresses a critical gap in middle-level education for students continuing from the existing program. The expansion responds to:

1. Parent surveys indicating preference for a full K–8 pathway to avoid transitioning to other middle schools.
2. Waitlist pressure in current grades, suggesting that families are seeking continuity.
3. Population trends in West Valley City, showing a significant number of school-age children and a diverse student population aligned with the charter’s mission.

The addition of 8th grade is therefore supported by both quantitative waitlist data and qualitative market demand, fulfilling R277-552(6)(vi)(C).

(f) Summary of Operational Success

Based on analysis of financial, enrollment, and compliance data, Esperanza Elementary meets all criteria for operational success as defined in R277-552(6):

1. Debt Coverage: All ratios exceed required 110% threshold for the last three fiscal years.
2. Financial Viability: Revenues exceed expenditures for three of the last four years; net lease-adjusted debt burden below 25%.
3. Charter Compliance: No violations reported; academic programs and operational metrics aligned with charter agreement.
4. Enrollment and Demand: Re-enrollment rates above 80%, waitlist over 40%, and demonstrated demand for 8th-grade expansion.

The combination of strong financial health, regulatory compliance, and sustained community demand supports the operational readiness of Esperanza Elementary to expand to include 8th grade.

References

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