Ivy Preparatory Academy

- *creating the leaders, lifelong learners, innovators, and artisans of tomorrow by educating the whole-child- head, heart, and hands – today*

Submitted December 1, 2015

I. Charter School Information

1. Name of proposed charter school Ivy Preparatory Academy

2. Name of applicant Ivy Preparatory Academy

3. Authorized agent Dena Lundgreen

4. Mailing address: 615 east 5900 south Murray, UT 84107

5. Phone number 801.809.5009

6. Email address denalundgreen@me.com

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

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

Submitted to Superintendent Keith C. Rittel who works at Provo School District on January 25, 2016.

9. Form of organization (check)

X Nonprofit Corporation ☐ Tribal entity ☐ Other

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

Name	Email	Position on Board (e.g., chair, secretary)	Type of expertise (e.g., educator, legal, finance)	Profession
William Brown	William.brown@impactnavigators.com	Chair	Business	CEO
Chris Allen	ccallenconsults@hotmail.com	Vice Chair	Business, Waldorf	CEO
Dena Lundgreen	denalundgreen@me.com	Secretary	Education Waldorf	Teacher
Gayla Gallacher	gayla@fnbutah.com	Treasurer	Finance	Banking
Lyndsay Huntsman	lhuntsman@pcschools.us	Voting member	Education	Education
Tom Nied	tom.nied@impactnavigators.com	Voting member	Business	Business Development
Shawn Potter	shawn@wasatchlawgroup.com	Voting member	Legal	Attorney

11. Year school will start 2017

12. Grades served k-6

13. Number of instructional days 180

14. Number of instructional hours 1019.5(1-6) 503 (k)

15. Requested Enrollment

Operational year 1: Grade K: 80 Grades 1-6: 450 Grades 7-8: _x___ Grades 9-12: __x__ Total: 530
Operational year 2: Grade K: 80 Grades 1-6: 450 Grades 7-8: __x__ Grades 9-12: __x__ Total: 530
Operational year 3: Grade K: 80 Grades 1-6: 450 Grades 7-8: _x___ Grades 9-12: ___x_ Total: 530

Does proposed grade configuration match resident district grade configuration? X Yes No

16. Target percentage of educationally disadvantaged students 67%

17. Is this application seeking special treatment under UCA 53A-1a-501.9? Yes No X

18. Is this application seeking priority consideration under UCA 53A-1a-502.5? Yes No X

19. A charter school may apply to the State Board of Education for a waiver of any Administrative Rule that inhibits or hinders the school from accomplishing its mission or educational goals set out in its charter. List any waiver requests here (i.e., Rule numbers. Justification supporting the need for the waiver as Attachment A). NONE

20. List persons whom you have designated as founding members of the school. Children/grandchildren of a founding member (an individual who has had a significant role in the development of a charter school application), employee, or Board of Trustees member are eligible for preferential enrollment under State law. Identify the percentage of student enrollments eligible for preferential enrollment under the status of founder's, employee, or board member child/grandchild. IPA's Preferential enrollment not to exceed 5% of total enrollment. Founders= *William Brown, Chris Allen, Dena Lundgreen, Gayla Gallacher, Lyndsay Huntsman, Tom Nied, Shawn Porter, Angela Hansen. Krystelle Rose*

I. Signatures

WE, THE UNDERSIGNED, do hereby certify that, to the best of our knowledge and belief, the data in this application are true and correct, and that we will comply with the charter agreement if this application is approved. Therefore, this application for charter school status and funding is hereby submitted with the full approval and support of the governing body of the proposed charter school.

Name of Authorized Agent Dena Lundgreen

Signature of Authorized Agent

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

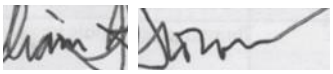
Signature of Charter School Board Chair (if different than Authorized Agent) 

TABLE OF CONTENTS

Cover page	1
Required Information	2
Glossary	5
Executive Summary	6
Section 1 School Purpose	9
Section 2 Market Analysis	14
Section 3 Student Population	19
Section 4 Program of instruction	30
Section 5 Performance Measures	51
Section 6 Governance	55
Section 7 Staffing	63
Section 8 Business Plan	72
Section 9 Education Service Provider	82
Appendix: A Waivers	82
Appendix B: Articles of Incorporation	85
Appendix C: Board of Trustees Bylaws	87
Appendix D: Board of Trustees Minutes	95
Appendix E: Executed Contracts	96
Attachment A: Board Information Sheets	96
Attachment B: Budget Excel Sheet	104

Glossary of terms used in this document as defined by IPA

Authentic assessment- Tasks in reading, writing, and math that resemble practical or real world usage, which IPA teachers use to assess mastery of a skill. For example, properly writing a letter of interest for a job or balancing a check book.

Child study- A process by which a team of teachers, specialist, and administrators use data to access and prescribe a plan of action to address a student academically, behaviorally, or socially.

Common Formative Assessment- An assessment created collaboratively as a grade level team and given to each student within the grade level to informally assess student growth toward an objective.

Cross-curricular teaching- The practice of synthesizing different disciplines into one unit of study. Ex. Teaching math concepts using science content,

Direct instruction- Teacher directed explicit instruction of specific skills.

Experiential learning- Learning through first-hand experience. For example, learning about recycling by going to a recycling plant and watching or participating in the process.

Kinesthetic teaching- Teaching and learning through movement - using actions to represent and recall information

Looping- The practice of a teacher remaining with the same group of students for more than one consecutive year

Main Lesson Block- A Waldorf-based two-hour instructional period focusing on the core curriculum and integrating a variety of learning approaches to encourage student learning through multiple modalities (visual, auditory, kinesthetic).

Multisensory teaching- Presenting information to students through three senses: visual, auditory and tactile.

Nature based learning-The use of the natural world to teach core subjects and concepts. For example, teaching measurement by mapping the placement of seeds in IPA's organic garden.

Professional Learning Community (PLC) - Groups of teachers, mentors and administrators regularly meeting and working together to define, analyze, support, and improve student achievement and well-being. A school can be considered a PLC.

a. Grade Level PLC- Involve only teachers of the same grade level
b. Vertical PLC- Involve teachers from grade levels above and below their own. For example, teachers in grades 1, 2, collaborate or grades 2, 3, 4 collaborate, etc.

Project based learning- The use of knowledge to solve realistic problems or answer real world questions.

Whole-child/ Holistic education- A philosophy of educating a child whereby information is presented with consideration of not only the child's cognitive developmental stage but also his social, and emotional stage of development. The educational program provides opportunities for emotional and social growth through relationship building and character education. Nurturing creativity, imagination, emotional, social, and physical health is as important as academic achievement.

EXECUTIVE SUMMARY

Ivy Preparatory Academy (IPA) is a public charter school that provides a holistic college preparatory education to a community seeking a school environment that prepares their children for the intellectual demands of the future while nurturing the unique social and emotional capacities developed in childhood. IPA students receive rigorous and relevant instruction in mathematics, English language arts, science and humanities centered on the Utah Common Core State Standards. Content is made meaningful and memorable as it is delivered through Waldorf's whole-child methodology. This methodology is guided by the principle that children learn best when they are engaged in learning in a three-fold manner: intellectually, emotionally, and actively. IPA calls this approach the, "***Head, Heart, and Hands***" method of teaching and learning.

Head- students gain both depth and breadth of knowledge through a comprehensive standards-based curriculum.

Heart- content is made meaningful and memorable through the integration of the arts, music, technology, nature, and community service.

Hands- learning is made purposeful through multisensory hands-on learning and real-world application through project-based learning.

Further, IPA's approach integrates subjects that stimulate creatively, intellectual curiosity, imagination, critical thinking, self-confidence, and respect for nature and humanity such

as:

- The arts (both visual and performing)
- Practical arts (woodworking and sewing)
- Music
- Movement
- Technology (basic coding, etc.)
- Nature-based learning
- Service learning
- Project-based learning

Through the use of proven Waldorf methods, a comprehensive program of instruction, and working knowledge of how children learn, IPA nurtures high academic achievement in every student, as well as, valuable interpersonal and practical life skills. Cooperation, collaboration, and self-advancement are encouraged with the goal of enabling students to concentrate on and celebrate personal growth.

WHAT IT MEANS TO BE A "WALDORF- METHODS" SCHOOL

IPA is a Waldorf methods school because we have chosen the methodology to deliver a college preparatory education. The founder of Waldorf education, Rudolf Steiner, intended for his methods to be used in both public and private school settings. In one of his last lectures Steiner said, ". . . the educational method represented here can be applied anywhere, wherever there is good will to introduce it" (Steiner, 1995). Every school that incorporates Waldorf into its program will have variance from one another. This is true of private Waldorf schools, Waldorf-inspired charter schools, and Waldorf-methods schools found in traditional school districts. IPA has chosen to implement Waldorf methods to provide a college preparatory whole-child education for the following reasons (discussed further in Section 4):

1. High academic expectations and rigor
2. Multisensory and developmentally driven method of lesson preparation and instruction
3. Integration of art, music, practical arts, and movement into core instruction
4. Emphasis on ecology and nature-based learning
5. Multi-cultural and global awareness curriculum
6. Real world application of knowledge
7. The human relationship to technology as a tool of creativity and self-expression.

Although IPA implements Waldorf instructional methodology, philosophy, culture, as well as, Waldorf arts and humanities curriculum, it does not intend to be a fully replicated Waldorf school for the following three reasons:

1. Traditional Waldorf schools do not follow the pacing of the Common Core State Standards (CCSS). IPA follows in the footsteps of Waldorf- methods district schools throughout the United States that implement CCSS aligned English language arts and math programs around which teachers develop Waldorf Main Lesson Blocks- integrated and cross curricular units of study lasting 2-6 weeks immersing students in subject matter.
2. Typically, Waldorf schools delay reading instruction until mid- first grade. Reading instruction at IPA begins in Kindergarten.
3. Waldorf schools de-emphasize and often prohibit the integration of technology IPA understands and respects today's students as "digital natives" making its integration a natural component of effective whole-child education.

Further, the name "Waldorf" is copy righted. A school must be fully replicated and must obtain special permission from the Association of Waldorf Schools North America, along with meeting other requirements to call itself "Waldorf" without the distinction "inspired" or "methods." IPA identifies itself as a Waldorf-methods school because we show complete fidelity to the Waldorf methodology of teaching and learning, however, we believe the three reason above are necessary to our mission of providing a college preparatory education.

APPLICANT GROUP'S ORIGIN

The Board of Trustees of IPA is a diverse group of educators and business professionals united by a love of education and a clear vision of the role academics play in a successful and happy life. Each member is a well-rounded and educated individual who is dedicated to creating a school that not only builds core academic knowledge, but also nurtures self-confidence, cooperation, self-awareness and compassion for others- skills necessary to succeed in all aspects of life. With experience spanning education, curriculum and instruction, research and development, management, banking and finance, law, business startup and entrepreneurship, Board of Trustees and Waldorf education, IPA's Founding Board is not only dedicated to Waldorf methodology, but is well equipped to develop IPA, keep it educationally aligned, financially sound, and legally compliant.

IPA DEVELOPMENT

Stated to open in August 2017, IPA intends to locate in or around the Provo, Utah area of Utah County. We will serve approximately 530 students in kindergarten through sixth grade. Kindergarten will consist of four ½ day classes of approximately 20 students each. First through sixth grade will consist of three classes per grade with approximately 25 students per class.

COMPETITIVE ADVANTAGE

IPA intends to locate in an area where schools and students perform well. As a college preparatory school, IPA will meet and exceed state averages in core subjects. IPA is unique in that it gives parents a choice in what experiences their students have while they are mastering concepts. Unlike the schools in the area, IPA provides consistent and purposeful integration of the arts, music, movement, and nature as a method of delivering core content and increasing student achievement. Further, specialty classes such as art, music, technology, and PE, are not disconnected components of the students' day, but act as multisensory reinforcements of concepts covered in the core curriculum. This is accomplished by specialty and classroom teachers collaborating to ensure a focused and purposeful multisensory whole-child education. As well, IPA systematically provides opportunities for students to apply knowledge and skills they have learned to real –world problems through project based learning. Lastly, students regularly spend time learning out of doors in IPA's *Landscaped for Learning* school yard. The school yard is used for science, sustainability education, and math. Because IPA is not duplicating other surrounding school models, it will appeal to students and families currently not being served.

EDUCATIONAL PRO9GRAM

IPA is a k-6 public school that:

- Delivers a college preparatory education structured around the CCSS
- Uses Waldorf's three fold "head, heart, and hands" instructional method for sustained learning
- Use multisensory teaching to reach all types and levels of learners
- Immerses students in the arts not as simple specialty classes, but as a means of delivering content
- Provides opportunities for students to discover their talents and interests through playing a musical instrument or singing, sculpting, painting and drawing, acting in plays, working with wood, etc.
- Experience the interconnectedness of knowledge through project based learning
- Helps students develop an affinity for and committeemen to their environment, community and world, through service learning
- Incorporates sustainable living practices, environmental stewardship and nature based learning
- Respects the Digital Native in each child by teaching them how to use technology as a tool of learning and self-expression through instruction in basis coding, etc.

SCHOOL COMMUNITY

IPA implements a collaborative model of governance with the Board of Trustees made up of community members that oversee the budget, operations, and fulfillment of the school's mission.

Teachers are involved in school leadership through the Leadership Team which consists of a teacher representative from each grade, Special Education, and specialty classes (art, PE, music). The task of the Leadership Team is to help determine professional development needs, student needs, and advocate for faculty and staff. Teachers have the opportunity to volunteer for and be assigned to a variety of responsibilities and/or patriciate on a variety of committees each year.

IPA involves parents in the school community through the Parent Guild. Members help plan school activities, parent/community involvement, school volunteers, and fundraising. IPA provides a variety of opportunities designed to involve parents through festivals, exhibits, performances, filed trips, classroom volunteerism, and enrichment activities.

IPA will actively seek partnerships with businesses and organizations within the community to support students in realistic and relevant project based learning, sustainability focused learning, and service learning opportunities.

SCHOOL PURPOSE

As specified in Section 1, A and in harmony with the intention of the Utah State Legislature in UCA 53A-1a-501.9, IPA's purpose is to improve student learning by employing new and creative methods of education that will create an innovative, developmentally driven educational choice for students and parents within the public sphere and meet the unique learning styles and needs of many students that may not be thriving in the traditional model schools available in the community. The addition of IPA substantially increases choice in educational models while improving student learning and promoting innovative teaching methods.

1. Increased Choice of Learning Opportunities for Students

As the only college preparatory elementary school in Utah County to implement Waldorf methods, IPA provides a successful, time tested approach to rigorous whole-child education to create a substantially increased choice of educational models in the Provo area. IPA will be recognized by the community as a highly desirable educational option and will be highly sought after by families in the surrounding community because of its unique experiential, arts-integrated, and holistic approach to college –ready education. Recognizing that district schools in the area perform well, and may offer aspects of IPA's curriculum such as an art class or science projects, none provide IPA's consistent and systematic arts integrated, multisensory, nature based, and project based whole-child curriculum. The addition of IPA provides an area with limited choice, a time-tested educational model that balances high academic achievement with quality whole-child education.

2. Improved Student Learning

IPA fulfills the purpose of improving student learning through its proven, arts integrated, multisensory, interdisciplinary and differentiated Main Lessons which present core subjects in 2-6 week units. Studies have shown significant correlations between academic success, enhanced critical thinking, and positives attitudes towards community in students who are educated with arts integrated curricula (Catteral. 1998). The multisensory approach to instruction within the Main Lesson presents information using multiple modalities making content assessable and memorable to all types and levels of learners. Main Lessons allow students to experience a greater breadth and depth of learning through connecting various disciplines and learning objectives within one unit of study. IPA offers the types of educational experiences that sustain learning —an integrated arts and hands-on curriculum that promotes human and brain development as it incorporates all five of the key methods through which children build neural connections: music, art, hands-on learning, movement, and forming personal connections to adults and the community.

3. Greater Educator Participation in Innovative Teaching Methods

IPA teachers are innovative in their practice as they create and implement engaging Main Lesson Plans using Waldorf's *head, heart, and hands* methodology. They artistically integrate the arts, music, movement, and other modalities of learning into comprehensive Core aligned curricula.

Innovation comes through finding purposeful ways to incorporate art, music, and physicality fully engaging the whole-child into core instruction without diminishing academic rigor. Further innovation comes from effectively connecting content by integrating multiple subjects and learning objectives into one unit of instruction. This is often called "cross-curricular integration." IPA teachers are not only trained in educational best practices, but also receive trainings in the cognitive, emotional, and social development of the age group with which they interact, as well as, how to identify service multiple learning styles. This understanding coupled with IPA's a strong program of instruction, invariably leads to the use of a variety of new and innovative teaching methods

They use proven standards based curricula and objectives (head) around which they build meaningful and memorable (heart) instruction integrating arts, music, drama, nature, and community, culminating into a product (hands) that shows the student's understanding, and mastery of lesson objectives. Innovation comes through finding purposeful ways to integrate multiple core disciplines, art, music, drama, technology and physicality to fully engage the whole child in learning.

IPA's teachers are not only trained in instructional best practices, but also receive training in the cognitive, emotional, and social development of the age group with which they interact, as well as, how to identify and service multiple learning styles. This awareness coupled with IPA's strong program of instruction, invariably leads to the use of a variety of new and innovative teaching methods.

Further, teachers work in grade level Professional Learning Communities (PLC) to mentor and support each other to ensure optimal student learning. They collaborate with teachers in the grade levels above and below their own (vertical PLC) to ensure foundational skills are being met at each grade level. Teachers are innovative as they collaborate to create Common Formative Assessments that accurately evaluate academic progress. Innovation continues as they create authentic assessment to measure the development of other skills, such as artistic ability, fine motor and gross motor skills, social and emotional capacities, and musical competency.

MISSION

Ivy Preparatory Academy delivers a whole-child, college preparatory education to students in kindergarten through sixth grade. Students experience rich academic content delivered through the integration of the arts, music, technology, nature, and service learning. Through our use of Waldorf's whole-child "head, heart, and hands" methodology, students emerge intellectually capable, self-confident, creative individuals ready to enter the next phase of their education.

VISION

Ivy Preparatory Academy is an educational community committed to the intellectual, social, and emotional growth of the whole-child. By providing a college preparatory curriculum taught

through Waldorf methodology, we are preparing students to become the leaders, lifelong learners, innovators, and artisans of tomorrow.

EDUCATIONAL PHILOSOPHY, CULTURE, AND FOUNDATION

Philosophy: IPA believes that the role of education is to develop intelligent, free thinking, well rounded, self-confident, individuals who are able not only to impart purpose and direction to their lives, but who see themselves as part of a global community able to positively affect the lives of others and the world. IPA provides a Waldorf methods college preparatory education to this purpose.

Culture: IPA's school culture exemplifies our philosophy above.

Academics: At the heart of IPA lies the belief that all children can learn at high levels if given the time, space, and tools. It is our highest endeavor to provide a rigorous, relevant, and comprehensive education to all children through thoughtfully planned content rich lessons delivered through research based Waldorf methods by highly trained and engage educators.

Whole-Child Approach: The foundation of IPA's pedagogy, whether teaching academics, character education, or addressing behavior, is the conviction that every child deserves an education that nurtures their cognitive, social, and emotional development. Waldorf teachers engage the whole-child (brain and body) in every part of the learning process through the integration of arts, movement, music, and the natural world in all core subjects. Students' self-efficacy and self-confidence is nurtured schoolwide through the continual building of positive and mutually respectful relationships between adults and children. Adults actively provide an emotionally, intellectually, and physically safe school environment.

Community Awareness: IPA believes that as educated individuals, we have a great opportunity to contribute to and make a difference in the world. Understanding our micro and macro communities help us see that the world is filled with diverse beliefs, cultures, and beauty and that we can help one another achieve our highest potential.

Foundation: Waldorf is the fastest growing independent school movement in the world. The modern philosophy behind Waldorf education is based on an innovative school started in Stuttgart, Germany in 1919 by Austrian philosopher and scientist Rudolf Steiner. In responding to a request during the cultural upheaval in Germany following World War I, Steiner outlined a model for education that has since inspired many schools called "Waldorf" after the first Steiner school. At its very inception the first Waldorf school embraced a sense of equity and social responsibility, open to all children stretching across a wide range of grades, and involving teachers in school governance. Driving all instruction is a three-fold model of human development and learning known as the *head, heart, and hands* methodology described above (Waldorf Answers, 2015). This approach educates the whole-child with the purpose of developing a strong base of knowledge in each child that serves as the foundation for higher level thinking, creativity, and self- awareness. IPA's approach to education practice is built on

this rich Waldorf philosophy and commitment to education for social renewal and self-advancement.

ANTICIPATED STUDENT POPULATION

Based on the demographics of district elementary schools within a five-mile radius of IPA's target location, IPA anticipates a large number of Hispanic students. Provo School District has a large number of underrepresented students and IPA can reasonable assume many of those students will come to the school. Based on surrounding school data the number of students qualifying for free or reduced lunch averages at 67%. IPA is prepared to serve this community. We do not anticipate these demographics varying significantly between an East or West side location.

MEETING THE NEEDS OF STUDENTS

IPA is distinctly different from other schools in meeting the needs of students by providing a proven and academically rigorous college preparatory education that recognizes the whole child and works in harmony with brain development for optimal growth and learning at all ability levels. The core instructional program teaches the Utah Common Core State Standards by using multiple modalities. The use of multiple modalities allows all types of learners to access the curriculum and process key information. These modalities include arts, music, and movement integration. Marzano, (2006) confirms that learning information through movement, drama, singing, and non-linguistic representations such as pictographs/art or drawing, reinforces the ability to retain and understand information and improve skills. Further modalities include the integration of technology, experiential, and nature-based learning. Another modality used is project based learning. Studies comparing learning outcomes for students taught through the use of projects versus traditional instruction show that project based learning results in an increase in long-term retention of content, helps students perform as well as or better than traditional learners in high-stakes tests, improves problem-solving and collaboration skills, and improves students' attitudes towards learning (Walker, 2009). IPA ensures students experience instruction using a variety of these modalities on a daily basis giving all students equal access to content. Academic rigor resulting in high student achievement is focal to IPA's purpose, however, students' social and emotional growth is just as important insomuch that it underlies all instruction. IPA students spend their school day with teachers who are trained in human develop specific to the age group they teach. This results in uniquely differentiated instruction and attention, and more effective interactions between teacher and student. Students who may be struggling academically in a traditional classroom will benefit from IPA's developmentally driven pedagogy. Those struggling emotionally and/or socially will benefit from Waldorf's cooperative learning where small groups or partners learn and work together. High achieving students will benefit from IPA's rigorous curriculum that provides students multiple opportunities to make cross-curricular and practical connections allowing for greater breadth and depth of knowledge. "On-level" students will be well served by IPA's curriculum that challenges them to think critically, solve problems creatively and work

cooperatively. All students receive a high quality college preparatory education that builds them intellectually, socially, and emotionally.

INTERNAL EVALUATION

IPA will engage in an annual Strategic Planning Process at which time the Board will evaluate the school's progress towards meeting the mission, vision, performance measures, Charter School Performance Standards and goals set forth in the Charter Agreement. The board will analyze data from the following areas and create a plan to improve and/or enhance school performance.

1. Student achievement
2. Teacher evaluations
3. Parent and student surveys
4. Teacher surveys and input

SECTION 2
MARKET ANALYSIS

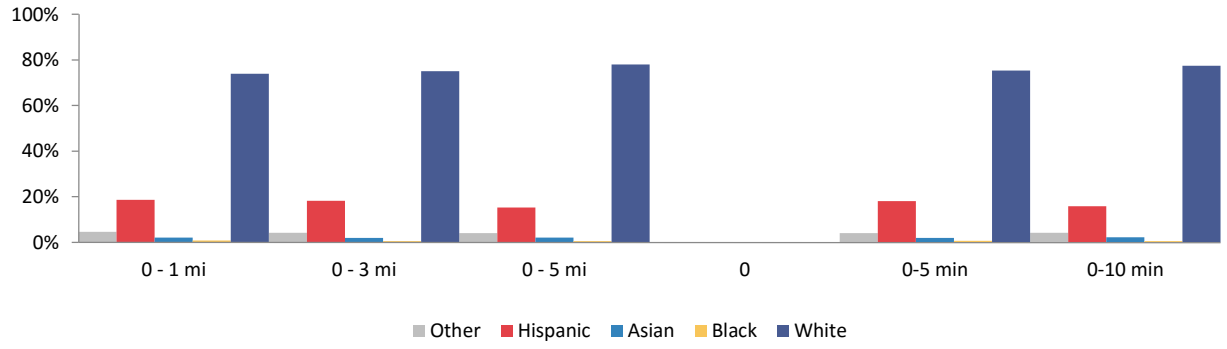
PROPOSED SITE

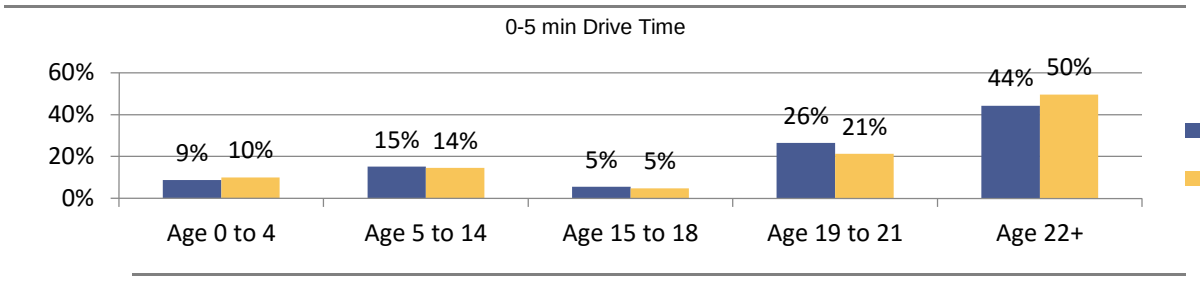
The proposed site for Ivy Preparatory Academy is 1860 East State Street, Provo, UT 84606. This land has already been promised to IPA by the developer. The population is in close proximity to other elementary schools in the area. However, as demonstrated by the charts below, there are 21,362 K-8 students located in a 1-5 mile radius of this area. The elementary and middle schools that serve these students are at or above capacity. This makes a very compelling argument for the need of IPA to locate in Provo. After the discussions with State Charter School Board, IPA immediately reached out to the community in Provo again. It was thought that Provo would have been the first choice above Bountiful, but because the initial proposal stated Bountiful as the area, IPA stopped its search in Provo. When IPA reached out again to the Provo community, there was a very positive response to this school. IPA has asked these community members to be part of an advisory board in helping with recruitment, marketing and building ideas for the school. Many of these board members have children who would be interested in attending IPA. Because the majority of the community members are within a 10-mile radius of this location it is reasonable to believe they would drive or carpool to this location. This location is also on a major street that has public transportation (UTA). It is approximately 1 mile from Micro Focus headquarters. It is ideal for IPA's program in that it provides ample space for long-term operation.
All statistics are based on Provo School District, Provo City and Utah County. It is important to stress the target population recognizes and frequents this area on a consistent basis. For our purposes, we reasonably assume the proposed site is well within the target population.

MARKET CONTEXT

Provo City is located within the boundaries of Utah County and Provo School District. According to the *Utah Governor's Office of Planning & Budget*, Utah County's population is 516,464 according to the 2010 Census. The proposed area within a 5-mile radius located in the city of Provo is expected to reach 154,075 residents by 2019. Of the county's 516,464 residents, approximately 30% reside in the proposed area of Provo City. All demographic information is as follows:

Demographic Variable	0 - 1 mi	0 - 3 mi	0 - 5 mi	0	0-5 min	0-10 min
2024 Forecast	7,065	73,913	168,520		39,047	157,806
2019 Projection	6,433	67,118	154,075		35,211	144,275
2014 Estimate	6,050	62,483	144,769		32,473	135,481
2010 Census	5,909	59,370	139,054		30,585	129,991
2000 Census	3,712	54,404	123,477		27,482	113,993
1990 Census	2,316	42,327	98,979		21,320	90,245
Growth 2019-2024	9.8%	10.1%	9.4%		10.9%	9.4%
Growth 2014-2019	6.3%	7.4%	6.4%		8.4%	6.5%
Growth 2010-2014	2.4%	5.2%	4.1%		6.2%	4.2%
Growth 2000-2010	59.2%	9.1%	12.6%		11.3%	14.0%
Pop. by Age	6,050	62,483	144,769		32,473	135,481
Age 0 to 4	760	5,043	11,380		2,838	10,638
Age 5 to 11	912	6,771	15,925		3,800	14,741
Age 12 to 14	246	2,116	5,437		1,100	4,878
Age 15 to 18	433	3,486	9,523		1,778	8,769
Median Age	24.4	21.1	21.8		21.2	21.6
Average Age	26.6	26.3	28.2		26.3	27.6
White	73.9%	75.1%	78.1%		75.4%	77.4%
Black	0.6%	0.6%	0.6%		0.6%	0.6%
Asian	2.0%	2.0%	2.0%		1.9%	2.2%
Hispanic	18.2%	18.2%	15.3%		18.0%	15.8%
Other	4.2%	4.2%	4.1%		4.1%	4.1%



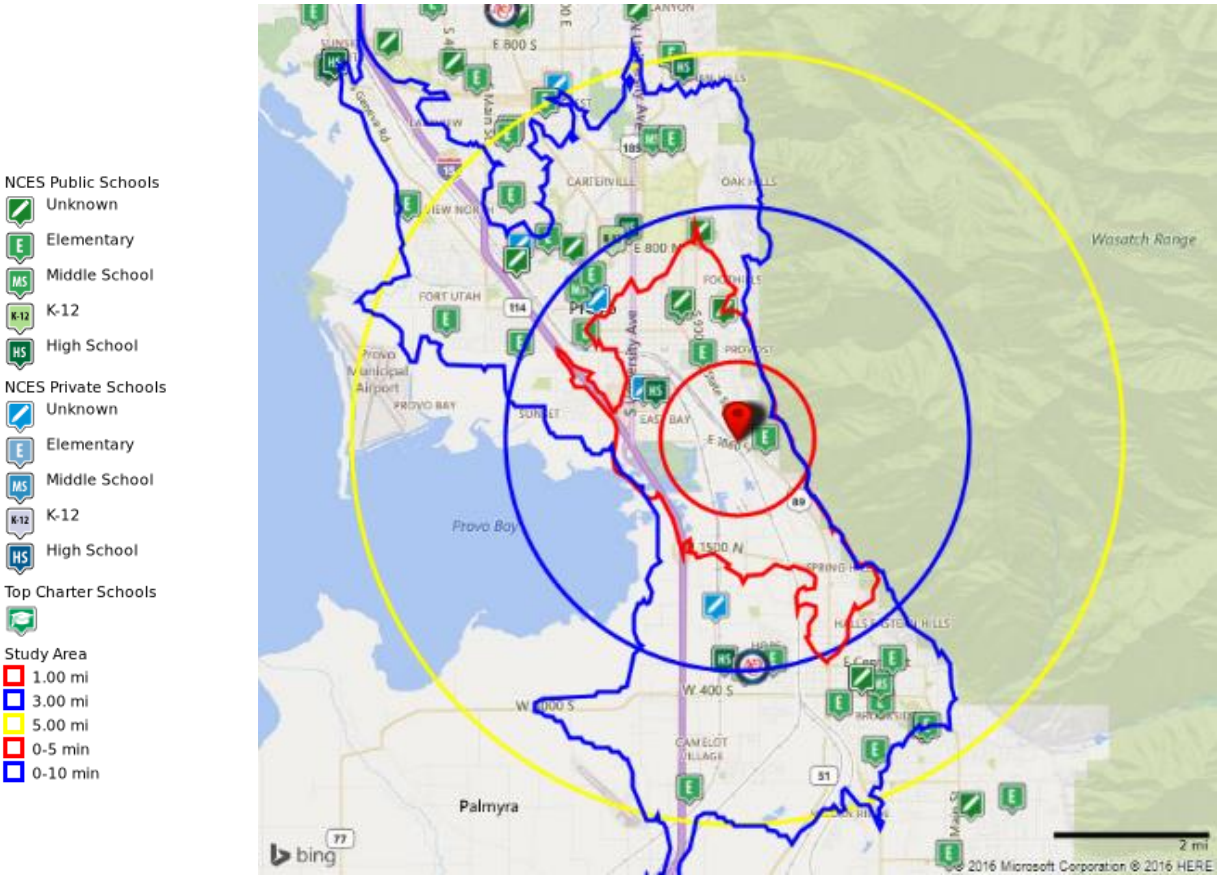


Based on the primary location of the proposed site, the following schools are within a 5-mile radius. The chart shows the location and grade of the school. The information on Private Schools was not available.

School Name	School Type	Enrollment	Grade	Address	City	Dist.
SPRING CREEK SCHOOL	Elementary	504	B	1740 SOUTH NEVADA AVE	PROVO	0.4
PROVOST SCHOOL	Elementary	447	A	629 SOUTH 1000 EAST	PROVO	1.18
EAST BAY POST HIGH	High School	0	NA	1170 SOUTH 350 EAST	PROVO	1.22
PROVO PEAKS SCHOOL	Elementary	618	A	665 EAST CENTER ST	PROVO	1.85
SUNRISE PRESCHOOL	Unknown	0	NA	87 NORTH 700 EAST	PROVO	1.9
FRANKLIN SCHOOL	Elementary	454	B	350 SOUTH 600 WEST	PROVO	2.39
WASATCH SCHOOL	Elementary	965	A	1080 NORTH 900 EAST	PROVO	2.71
DIXON MIDDLE	Middle School	820	C	750 WEST 200 NORTH	PROVO	2.81
TIMPANOGOS SCHOOL	Elementary	703	B	449 NORTH 500 WEST	PROVO	2.83
MERIT COLLEGE PREPARATORY ACADEMY	High School	0	C	1440 WEST CENTER ST	SPRINGVILLE	2.88
WESTSIDE SCHOOL	Elementary	815	C	740 WEST CENTER	SPRINGVILLE	2.91
REAGAN ACADEMY	Elementary	500	B	1143 WEST CENTER	SPRINGVILLE	3
ESCHOOL@PROVO SCHOOL DISTRICT	K12	2435	F	280 WEST 940 NORTH	PROVO	3.04
PROVO HIGH	High School	1895	C	1125 NORTH UNIVERSITY AVE	PROVO	3.06
SUNSET VIEW SCHOOL	Elementary	5110	B	525 SOUTH 1600 WEST	PROVO	3.07
EARLY CHILDHOOD ED CNTR	Unknown	0	NA	815 NORTH 800 WEST	PROVO	3.25
ART CITY SCHOOL	Elementary	592	B	121 NORTH 900 EAST	SPRINGVILLE	3.5
BRIDGES NEBO TRANSITION CENTER	Unknown	0	NA	105 SOUTH 400 EAST	SPRINGVILLE	3.52
FREEDOM ACADEMY	Elementary	0	C	1190 WEST 900 NORTH	PROVO	3.57
PROVO ADULT EDUCATION	Unknown	0	NA	636 NORTH INDEPENDENCE AVE	PROVO	3.67
CHERRY CREEK SCHOOL	Elementary	795	B	485 SOUTH 200 EAST	SPRINGVILLE	3.69
SPRINGVILLE JR HIGH	Middle School	1058	B	165 SOUTH 700 EAST	SPRINGVILLE	3.69
BROOKSIDE SCHOOL	Elementary	7550	B	750 EAST 400 SOUTH	SPRINGVILLE	3.89

ROCK CANYON SCHOOL	Elementary	634	A	2405 NORTH 650 EAST	PROVO	3.96
CENTENNIAL MIDDLE	Middle School	988	C	305 EAST 2320 NORTH	PROVO	4.02
AMELIA EARHART SCHOOL	Elementary	514	B	2585 WEST 200 SOUTH	PROVO	4.07
WESTRIDGE SCHOOL	Elementary	827	B	1720 WEST 1460 NORTH	PROVO	4.29
SAGE CREEK SCHOOL	Elementary	748	B	1050 SOUTH 700 EAST	SPRINGVILLE	4.43
SPRINGVILLE HIGH	High School	1440	B	1205 EAST 900 SOUTH	SPRINGVILLE	4.44
TIMPVIEW HIGH	High School	1975	B	3570 NORTH 650 EAST	PROVO	4.85
CHERRY HILL SCHOOL	Elementary	671	C	250 EAST 1650 SOUTH	OREM	4.93
CHERRY HILL GT PROGRAM	Middle School	50	A	250 EAST 1650 SOUTH	OREM	4.96

The following map shows the radius and where the following schools are located within the 5 mile radius:



According to the statistics, 29% of the schools in the proposed area are under performing to meet AYP standards. The average math proficiency score in the elementary and middle schools

was 53.1%. Because our school is aimed at high achieving standards IPA hopes to succeed this standard with the comparing schools.
After a more thorough study of the facts, it became clear that a school for this community was to be spearheaded through leaders of the community. In the following days, conference meetings took place to discuss if this school would be attended by the surrounding community. No statistics were recorded as it was a preliminary meeting. However, anecdotally speaking, an overwhelming amount of these community leaders (approximately 10 of the 15 in attendance) gave their support to IPA. Given the approximate people in attendance, we could reasonably anticipate support from this community.

The numbers in the charts, the discussion and the community leader meetings are being used to establish the support for IPA and the school that will serve all students who enroll.

COMPETITIVE ADVANTAGE

IPA's focused instructional program is a tremendous competitive advantage. IPA has researched this community to determine if this school would be an appropriate fit. Those involved with the formation of this school are totally committed to the success of Waldorf methodology and making sure no child is left behind. IPA students will develop the following skills and attributes necessary to be successful in college and life.

IPA will establish technology throughout the program and also bring in after-school programs, hiring college students to work part-time as after-school tutors. We will try to focus on college students who are motivated by the program of instruction in particular as they could easily be mentors to these students as well. Tutoring will be available to all students.

The advantage of the school is based on the target population and the support that has been previously mentioned through discussions and genuine concern from the surrounding community. IPA is targeting a significant but focused segment of the population. Therefore, the advantage is less about school choice competition and more about succeeding in a small but significant group of students. The Provo community is passionate about its students and has chosen through this school to help students achieve academically, socially and emotionally on the highest levels.

While we have not purchased a specific site at this time, the proposed service area has been determined to make sure all students from all backgrounds are given every opportunity to achieve.

OUTREACH/MARKETING PLAN

IPA acknowledges the role effective marketing/outreach plays in providing parents with the opportunity to actively participate in the enrollment process. Therefore, we have established a marketing plan designed to inform parents in the Provo area of the school's program and provide these parents equal opportunity to participate in its offering. Inasmuch as many schools struggle to meet the needs of various groups, IPA will specifically seek to inform parents of these students of the enrollment opportunities at IPA. Outreach literature/advertising will be in English and Spanish as IPA is aware of the growing Latino population that surrounds this area. IPA will provide this literature to community leaders, Micro Focus and surrounding businesses. The school will utilize its website, local newspapers, school-based marketing, flyers, brochures, mailings, radio, and other ads to inform the public. IPA will also implement active social media sites to answer questions about the proposed school. To implement IPA's outreach plan, committees will be created, application processes will be simplified within the laws of the State of Utah, and marketing materials will be strategically located in various businesses, Micro Focus, surrounding Wal-Mart stores, South Provo Mall, Provo COSTCO, all Provo libraries, Provo Recreation and Community center, billboards in the surrounding area, as well as radio and TV ads that are within the marketing budget. We are also working with community fundraising events to market IPA.

Because of the easy access to the proposed site the school will not provide transportation. It is critical that the school be open to all potential students. Finally, IPA will seek potential volunteers and students through public service announcements, informational seminars and networking and opportunities in the community. Individuals expressing interest will be included on IPA's mailing list and social network in order to keep them connected and informed of the progress and volunteer opportunities at the school. The marketing effort for this initial start-up will transition into a longer term marketing strategic plan to make sure the school benefits the students and families most needing it.

SECTION 3
STUDENT POPULATION

Three Year Projected Enrollment

Years 1-3	**k**	**1**	**2**	**3**	**4**	**5**	**6**	**Total School Enrollment**
Total Students per grade level	80	75	75	75	75	75	75	530

EVIDENCE OF DEMAND

Provo School District anticipates servicing 17,167 students in the 2016-17. According to their district improvement plan published in August of 2015, the district set forth foundation principles associated with the 20/20 initiative that aims at having students involved in academic pursuits as well as civic engagement. The district also proposed a construction plan. In an effort to accommodate rising growth in the district, there are two new elementary schools planned for the 2018-2019 school year. They have also announced the reconstruction of Provo High, Provost Elementary, and Edgemont Elementary schools. http://provo.edu/construction/

There is not a need to debate school choice in Provo School District. The obvious need set forth by the district in proposing two new elementary schools shows there is a demand for IPA. We are choosing Provo City because the majority of our community is excited about IPA. The Waldorf inspired curriculum really resonates with this community and IPA feels as though it would be a very successful charter. Private school choices do exist, however, with a price tag of $17,000 per year and up, it is often out of reach for people in this community. These schools are also not within easy access to our proposed location.

TARGET POPULATION

IPA's target population are those families who:

- Seek a college preparatory education that successfully balances high academic achievement with an environment that actively nurtures the emotional, social and creative aspects of human development.
- Want their children to experience art, music and movement, not as simple "specialty classes" but as a purposeful and meaningful part of core academics.
- Want their children to have time out of doors in experiential nature-based learning.
- Want their children actively engaged in community service, literate in the cultures and history of the world emerging well rounded, individuals confident in their abilities and ready to continue their education.

IPA families are secure in the knowledge that their child will experience, on a daily basis, an education that enriches and expands their intellect, is meaningful and memorable, and inspires children to be creative and free thinking.

Although Waldorf schools are new to Utah, there is a large community devoted to the method. IPA intends to recruit those families already familiar with the Waldorf philosophy, however, it is not a necessity to be familiar with the Waldorf name or philosophy to be attracted to the school. IPA believes many parents want their child to experience an education that views their child as a whole person, one that sparks creativity, depth of thought, self-awareness, self-confidence and excitement towards learning. We also believe there are families who are experiencing the polarization of educational choice. Families who attend college preparatory

schools may be missing out on the integration of arts, nature, music, movement, and projects. Others may be sacrificing high academic achievement in lieu of an experiential, arts integrated, holistic education. IPA students need not sacrifice any aspect of their development. IPA intends to actively educate and recruit all families to its college preparatory whole-child education.

ALIGNMENT OF MISSION, VISION, AND CURRICULUM TO TARGET POPULATION

IPA connects its mission, vision, and curriculum its target population through providing an academically rigorous curriculum structured around the Utah Common Core State Standards-standards specifically created to make students college and career ready. Teachers use research based, proven curriculum and hold students to high academic standards. Students are continually informally assessed by teachers who use the data to alter instruction to ensure academic success for all students.

Content is delivered using Waldorf's whole-child methodology which is guided by the principle that children learn best when they are engaged in learning in a three-fold manner: intellectually (head), emotionally (heart), and actively (hands). It integrates subjects that stimulate creatively, imagination, critical thinking, self-confidence, and a respect for nature and humanity such as the arts (both visual and performing), practical arts (woodworking and sewing), music, ecology, movement, project-based learning, technology, nature based learning and service learning. In addition, the core instructional program utilizes multiple modalities to help all students access the curriculum and process key information. The use of multiple modalities to facilitate learning is central to Waldorf education. A growing body of research in cognitive science (Marzano, 2006) confirms that learning information through movement, drama, singing, and non-linguistic representations such as pictographs or drawing, reinforces the student's ability to retain and understand information and improve skills. Subsequently, the combination of a rigorous standards-based curriculum with Waldorf methodology aligns perfectly with IPA's mission of providing a college preparatory education while nurturing the whole-child and targets the population the school hopes to serve, students and families who seek a comprehensive whole-child education who are not being fully serviced and engaged in traditional methods public schools.

IDENTIFICATION AND SERVICE OF SPECIAL POPULATIONS

IPA will ensure a free and appropriate public education (FAPE) to all students regardless of ability and circumstance in accordance with Federal and State Law. IPA is dedicated to the early identification of and service to students regarded as a special population such as English Language Learners (EL), 504, special education, and the homeless. IPA will identify these students through a variety of avenues including, but not limited to:

- Registration: include home language survey, special education, and 504 identification questions
- Meetings with parents of in-coming students

- Review of educational records from previous placements
- Economic disadvantage forms
- Assessment data (state required and curriculum based)
- Teacher observation and behavioral data
- Teacher generated student information survey

Educating Disadvantaged Students: IPA serves disadvantaged students through its use of Waldorf methodology which has been proven to be an effective educational method for many children who struggle in traditional classrooms, as well as gifted students, and typically developing students. Ample research supports the use of Waldorf methods for at-risk populations. The Thomas E. Mathews Community School in Yuba County, California serves high-risk juvenile offenders, many of whom have learning disabilities. The school switched to Waldorf methods in the 1990s. A 1999 study of the school by Babineaux found that students had "improved attitudes toward learning, better social interaction and excellent academic progress." This study identified the integration of the arts "into every curriculum unit and almost every classroom activity" of the school as the most effective tool to help students overcome patterns of failure. The study also found significant improvements in reading and math scores, student participation, focus, openness and enthusiasm, as well as emotional stability, civility of interaction and tenacity

As well, after the Bill & Melinda Gates Foundation helped launch the first public Waldorf high school, the George Washington Carver School of Arts and Science in Sacramento, California, scores on the California Statewide Tests rose dramatically. In this case, the methods proved highly effective for under-achieving and special needs students. In 2011, just three years after adopting Waldorf methods and pedagogy, only 12% of 11th graders scored “far below basic” or “below basic” on Statewide English tests, compared to 67% of 11th graders scoring at below basic levels when the school opened.

Brain-based research conducted by Kotulak (1996) has shown that human beings learn what is most meaningful to them. Conversely, new material for which there is no connection is discarded. If an emotional connection is made during learning, the material learned is reinforced. Connection and meaning (IPA’s heart and hands approach) is fundamental to IPA’s lesson design and, in the higher grades, often manifests as projects. A recent review of research on learning through projects suggests that it is a teaching method that may be particularly well adapted to disadvantaged youth (Thomas, 2000). According to this research, projects make the content areas more relevant and meaningful to disaffected youth, while enhancing the quality of student learning and the development of self-directed learners. Later research by Creghan (2013) suggests learning through projects positively impacts student achievement, student attendance, while positively impacting behavior in schools with a high population of disadvantaged students.

English Language Learners (El): IPA's use of multiple modalities is particularly important for English Learners (EL) students in the regular classroom. It builds oral language skills, concept comprehension, and key social skills. Research shows that students who engage in complex forms of socio-dramatic play and multisensory learning, have greater language skills, better social skills, and greater information processing skills than those students given little or no play time (Miller, 2009).

We will further meet the needs of EL students through:

- Providing strong classroom instruction by teachers holding ESL/EL certifications
- One-on-one tutoring by or under the supervision of ESL/EL certified teacher
- Extra time and help with individual or group assignments
- Peer tutoring
- Supplementary curriculum focused on ESL/EL students

Homeless Students: Understanding the effects of homelessness on a child's development, education, and socio-emotional wellbeing, IPA will take special care in the education of students who are deemed homeless who "lack a fixed, regular, an adequate nighttime residence" (Center Serve, 2015). They will be given all of the rights and privileges under the McKinney Vento Act as well as a free appropriate public education. IPA will provide students with any and all needed school supplies, they will have free access to field trips, learning activities and project based learning opportunities. IPA's Parent Guild will become involved in fundraiser opportunities for the economically disadvantaged as well as doing coordinated carpooling and transportation offerings. Additionally, IPA will consider all needs of the student and make referrals for community services as needed by individual family situation.

High Achieving Students: IPA is committed to a developmentally driven education for all. Students achieving above grade level as measured by standardized test and interim benchmark assessments, will receive appropriate academic extensions within the classroom. Teachers will differentiate by using appropriate resources, products, assignments, and pacing. During a portion of small group collaboration time, high achieving students may be paired with lower performing students to offer support or be paired with other high achieving students to share challenging assignments. Enrichment activities and Main Lesson block projects will also provide opportunities for academic challenges.

Special Education: IPA will adhere to all state and federal laws and regulations regarding special education including, but not limited to, requirements outlined in the Utah State Board of Education Special Education Rules (USBE-SER II.A.) as well as the Individuals with Disabilities Education Act (IDEA), Americans with Disabilities Act (ADA), and section 504 of the Rehabilitation Act of 1973. The Executive Director will oversee the special education department, closely monitor special education caseloads, and follow special education caseload guidelines from the USOE. We will further meet the needs of Special Education students through:

- Properly licensed teachers (SpEd -mild to moderate, severe) and highly trained paraprofessionals will work with individuals and groups
- Providing auxiliary service providers, including but not limited to, psychologists, speech-language pathologists, occupational therapists, and physical therapists as needed
- Students are educated in the least restrictive environment possible
- Provide timely and thorough Individual Education Plan (IEP) development
- The Special Education Director will closely monitor and oversee that all students receive accommodations and services set forth by their IEP.

Funding will come from special education monies, and if necessary, the general school budget, in compliance with school fiscal policy.

Students with Special Needs: It is IPA's priority to identify students with special needs as quickly as possible. Upon entrance to the school, initial paperwork will ask if the student has a current IEP. If an IEP is in place, records from the previous school will be requested and special education services will begin immediately in accordance with the existing IEP. The IEP team will then determine whether to adopt the existing IEP or convene a meeting for the purpose of constructing a new IEP.

IPA'S CHILD FIND

The Special Education staff will train all members of the instructional staff annually in confidentiality and "child find" procedures. IPA will use the Multi-Tiered System of Support (MTSS) to find students who are suspected of having a disability not yet identified or determined eligible for special education services. If a student is not progressing toward mastery of the Utah Common Core State Standards or is struggling socially, behaviorally, in communication or with motor skills, the teacher will follow the three-tiered system of support:

- Tier One (Prevention) includes high-quality classroom instruction delivered by highly qualified teachers and regular assessments of all students to monitor their progress toward reaching grade-level benchmarks.
- Tier Two (Selected Structured Intervention) includes targeted group intervention in class or outside of the classroom for students who are not meeting grade level benchmarks. During Tier Two students may be referred to the Student Success Team (SST).
- Tier Three (Intensive Intervention) includes more intensive and possibly individualized intervention for students who continue to be at risk. SST members identify the specific academic areas of need for low achievers and plan interventions that are monitored and reviewed at subsequent meetings. At this level, a student may be referred for Special Education eligibility assessment (with parental permission) according to IDEA.

STUDENT SUCCESS TEAM

The Student Success Team (SST) is a general education function to successfully prevent advancement to Tier 3 interventions. The team is made up of the special education teacher, a lower and upper classroom teacher, the Executive Director or designee, any appropriate specialty teacher, and, when needed, the school psychologist or other specialist. The team uses a systematic problem -solving approach to identify the student's needs during Tier 2 intervention and is responsible for developing a plan (with specific timeline for implementation) to enable the student to be successful.

At any tier of intervention, a student may be referred for Special Education testing by their teacher, SST, or their parent. Once a student has been referred for Special Education assessment, the process is no longer a general education function and becomes driven by the protocol set forth by IDEA. If a student is deemed eligible for special education placement, IPA will ensure that the services provided and the plan created will be designed to provide the student with a free and appropriate public education in the least restrictive environment possible.

SECTION 504 OF THE REHABILITATION ACT

IPA recognizes its legal responsibility to ensure that no qualified person with a disability shall, on the basis of disability, be excluded from participation, be denied the benefits of, or otherwise be subjected to discrimination under any of IPA's programs. Any student, who has an objectively identified disability that substantially limits a major life activity including but not limited to learning, is eligible for accommodation by IPA. If a child is suspected to be eligible for a 504 plan, a 504 team will be assembled by the Director and will include the parent/guardian, the student (where appropriate) and other qualified persons knowledgeable about the student, the meaning of the evaluation data, placement options, and accommodations. The 504 team will review the student's existing records; including academic, social and behavioral records, and is responsible for making a determination as to whether an evaluation for Section 504 services is appropriate. If the student has already been evaluated under the IDEA but found ineligible for special education instruction or related services under the IDEA, those evaluations may be used to help determine eligibility under Section 504. The final determination of whether the student will or will not be identified as a person with a disability is made by the 504 team in writing and notice is given in writing to the parent/guardian of the student in their primary language along with the procedural safeguards available to them. If during the evaluation, the 504 team obtains information indicating possible eligibility of the student for special education per the IDEA, a referral for assessment under the IDEA will be made by the 504 team.

SERVICES AND PLACEMENT

By using Waldorf methodologies IPA has the tools necessary to affectively educate children with disabilities in a full inclusion classroom and the least restrictive environment. For IPA students with mild/moderate and or moderate/severe learning disabilities, IPA will utilize

strategies that support their ability to process and retain information, build social relationships, and organize effectively for learning.

The Waldorf approach makes accommodations easier than might be possible in a traditional classroom because of its highly differentiated and holistic approach to meeting the needs of each student. IPA will make it possible for students with special needs to meet grade level standards, scaffolded and modified if needed, as set forth in individual plans. This is facilitated by IPA's practice of looping allowing students with IEPs the advantage of working to achieve their goals with the same teacher for consecutive years minimizing instructional time lost during transitions between grades and assimilation. Students will demonstrate what they know through formal and informal testing, portfolios, oral presentations, and projects without being impeded by their disability.

QUALIFIED SPECIAL EDUCATION STAFF

It is a priority of IPA to employ a highly qualified and highly trained faculty and staff. This is especially true regarding the special education department. The Special Education Director (SPEDD), teachers, and paraprofessionals will hold the appropriate certification and licensing. They will participate in continual processional development centered on students with special needs and attend all state required special education in-service class outlined in the Utah State Office of Education (USOE) rules and regulations as well as those mandated by the Executive Director. The SPEDD will be responsible for the school's implementation of special education services adhering to the IDEA and Utah Special Education State Board of Education Rules (USBE SER) and Guidelines. When hiring special education staff, the Executive Director will follow the USBE SER and Utah's public charter school laws for hiring highly qualified teachers.

OUTREACH AND RECRUITMENT

IPA will use a spectrum of marketing techniques in order to recruit students from a variety of backgrounds and cultures. IPA will comply with all State and Federal laws regarding educational access, including serving homeless students, immigrant students, non-English speaking students, and students with disabilities. IPA will also seek to provide marketing materials translated into Spanish (and other languages as the need and capacity exist) and made available to parents, as needed. Our objective is to have a student population that is representative of Provo School District in terms of socio-economics (median income in a 5 mile radius of the proposed site is approximately $52,000), culture and ethnicity, academic performance, and special needs. IPA's outreach efforts, for which $50,000 has been budgeted, will include the following:

1. A well designed and maintained school website including videos and resources
2. Social media presence –Facebook, Twitter, Waldorf related sites, Blogs
3. Monthly open house/parent information nights

4. Information booths – City celebrations, parades, farmers markets,
5. Press release in local papers- Ads in Community Brochures, including programs for arts events
6. Networking with local churches, parent organization, daycares, etc.
7. Door –to-door communications in neighborhoods surrounding the school
8. Yard signs/ flyers at libraries, markets, stores, and residences
9. IPA's school ground breaking, ribbon cutting
10. Promotion at local Utah Waldorf community celebrations

IPA's outreach began in March of 2015 when Dena Lundgreen began promoting the proposal for a Waldorf methods charter school to be located in Utah County through the Utah Waldorf Facebook page. Since then, the school's progress has been updated and has become an exciting and talked about prospect within the local Waldorf community. An IPA Facebook page is currently being maintained to keep interested parties updated. Recently, IPA launched a seven day Facebook campaign targeting Provo area families resulting in an increased amount of page "likes" and interest in learning more about the school's program. Campaigns, as well as, community based information meetings have commenced prior to charter approval.

Following charter approval, notices of public Board of Trustees meetings will be posted on the school's website as well as on the Utah Public Meeting Notice website as required by the Utah Open Meetings Act. IPA will launch an aggressive marketing campaign to increase awareness of the school and its methods to generate enrollment for the 2017 school year.

LOTTERY AND ENROLLMENT

IPA will recruit from all segments of the community and in a manner that does not discriminate against students of a particular race, color, national origin, religion, sex, sexual orientation, or disabilities; however, IPA may target additional recruitment efforts toward our target market that surrounds the new school.

Although we do not anticipate that we will have a high percentage of students moving out of the school, we will have a rolling enrollment process, meaning, if we lose a student, we will take the student who is at the top of the waiting list for that grade.

Preferential Enrollment

Primary preferential enrollment for any grade is given to children of the school's **founders**. Founders are individuals who have served a significant role in the development of the school, making a substantial and consistent investment of time and resources in the charter application and school opening process. They interested in IPA's charter as "Founder" or "Board Member" and must meet the following criteria:

- Regular attendance at 80% or more of IPA's Board and/or Committee Meetings

(relevant to individual's responsibilities) annually;

- A minimum of 120 hours of work for IPA
- Work must be directly connected with the activities and goals of the Board of Trustees and/or Committees (up to half of these hours may be comprised of attendance at meetings);
- Documentation of all qualifying activities. Founder status will not be conferred based upon financial or other donations made to the school. IPA will not give preference to any student and will not make any enrollment decision on any basis prohibited by state or federal law, including federal civil rights laws and IDEA 2004. Specifically, IPA will not request any data of applicants other than their name, grade level, and parent contact information (including possible founder or staff status) prior to the lottery.

Secondary preferential enrollment is given to children of **teachers** who work more than 20 hours per week for the school. Children and grandchildren of independent contractors providing services to the school are not eligible for admission preference.

Third preferential enrollment will be given to **siblings** of students already admitted to or attending IPA.

Fourth preferential enrollment is given children of **employees**.

The combined number of students from these four preferences will not exceed five percent (5%) of the total student population.

Open Enrollment

IPA intends to provide families the convenience of enrolling in the lottery online. A computerized system for randomly selecting students for admission will be used. For those families with little or no access to technology, paper versions of the enrollment forms will be available upon request.

Once a student has been admitted to the school through an appropriate process, he or she may remain in attendance through subsequent grades and will be exempt from the lottery process.

Lottery Selection

A lottery is a random selection process by which IPA admits applicants into the school. IPA will use a lottery if, during the open enrollment period, more students apply for admission to the charter school (in any grade) than can be admitted. The names of prospective students shall remain confidential.

Although students who have preferential enrollment are exempt, by law, from participation in the lottery process, they will be placed into the lottery in the same manner as other students. Should there be a student from the preferential group that did not get picked by the lottery, they will take one of the allowable five percent slots that are predetermined by the number of slots available times five percent. If the five percent slots are full, then the student will be put

back into the lottery pool. Student numbers will be selected using bingo balls with a matched list of students to specific numbers (multiple birth students will have the same number). Students will then be admitted to the school in the order created by the lottery process until all openings for each grade level are filled. Remaining student names are added to the waiting list, preserving the order created by the lottery process. When a student is admitted to the school through the lottery process, all siblings of that student are admitted immediately, if space is available. If space is not available for a particular grade, that sibling will be placed on the waiting list. The annual lottery will be held on-site on the 4th Wednesday of February. IPA will notify applicants of the lottery results within 2 weeks. Students placed on the waiting list will be given the opportunity to attend the school if spots become available during the school year. Families will be notified and students have 7 days to accept the opening.

Students who apply after the enrollment period will be admitted as space allows or will be added to the waiting list via the lottery process. In enrollment years subsequent to the first, IPA will continue to grant preferential enrollment and may add or modify preferences as allowed by state law and will occur only through an amendment process where both Board of Trustees and chartering entity agree.

The Board of Trustees will establish and update, as needed, policies and procedures for admittance and registration in accordance with current state laws, including provisions for an open admission, lottery, and preferential enrollment. The school will ensure that notice of admission policies, procedures, and timeframes for the admission process is provided to the public through a variety of means.

TRANSFER AND WITHDRAWAL POLICY

Utah State Law governs student transfers between Utah's public charter schools and school districts.

Before June 30, 2017: If a student has accepted enrollment to IPA for the 2017-18 school year and the parent wishes to withdraw the student from IPA for enrollment in his or her school district of residence for the 2017-18 school year, the student's parent must submit a notice of intent to enroll to IPA administration no later than June 30, 2017.

If a student has accepted enrollment to IPA for the 2017-18 school year and the parent wishes to withdraw the student from IPA for enrollment in another Utah charter school for the 2017-18 school year, the student's parent must submit a notice of intent to enroll to the school along with their letter of acceptance from that charter school to the IPA administration no later than June 30, 2017.

If a student's application for registration at IPA has been approved and the student wishes to enroll but has already accepted enrollment at another Utah charter school for the 2017-18 school year, the student's parent must inform the other charter school of their intent to enroll at IPA and must also submit the letter of acceptance from IPA to the other charter school no later than June 30, 2017.

After June 30, 2017: If a student has accepted enrollment to IPA for the 2017-18 school year and the parent wishes to withdraw the student from IPA for enrollment in another Utah charter school or school district, the parent of a student enrolled at IPA must obtain approval from both the IPA administration and the Utah school district or charter school in which enrollment is sought. If a student wishes to enroll at IPA but has accepted enrollment to another Utah charter school for the 2017-18 school year, the student's parent must obtain approval from both the IPA administration and the Utah charter school in which the student is already enrolled. Student records will be released as soon as all appropriate paperwork is completed

SECTION 4
PROGRAM OF INSTRUCTION

We intend to use a curriculum that has already been developed
We do not intend to offer career education as a focus
We do not intend to utilize a blended/distance learning model
We do not intend to offer gifted education as a focus
We do not intend to partner with a college or university

SUMMARY

IPA's program of instruction is meant to educate the whole-child to successfully matriculate into the next stages of their education. At IPA, "whole-child" means that we recognize that creating educated and capable students does not merely consist of meeting the needs of their intellectual development. IPA recognizes that children are moral beings; therefore, we must pay attention to the development of their feelings, character, and personality, as well as, their social growth and well-being. We recognize that children are artistically inclined; therefore, we must nurture their imagination, creativity, and curiosity. We recognize that children naturally need to move, play, and explore the physical world; therefore, we must provide time and opportunities to do so. These attributes are not parts of the child we simply "cover" during the school day through isolated character education programs, or compartmentalized art and PE classes, instead meeting these aspects is purposely integrated into our curriculum and methodology. This is why we have chosen Waldorf's whole-child method to meet the needs of our students. It is guided by the principle that children learn best when they are engaged in learning in a three-fold manner: intellectually (head), emotionally (heart), and actively (hands). This approach brings forth creative imagination, critical thinking, self-confidence, and a respect for nature and humanity while building a strong academic foundation.

IPA provides a college preparatory education through the implementation of basal Math and English Language Arts programs aligned to the Utah Common Core State Standards. These programs are taught using Waldorf methodology-a methodology supported by the latest research in educational neuroscience establishing strong linkages between high student achievement and Waldorf methods. Marzano's research confirms that the use of certain

practices used in Waldorf schools, like teacher looping, summarization, and interdisciplinary teaching allow children to excel on a variety of assessments, including standardized tests (Oberman, 2008). Further, IPA's ELA and Math curriculum is supplemented with Waldorf – based curricula in art, music, and movement. Science and Humanities (world cultures, history,) follow the Utah State Standards enriched with corresponding Waldorf curricula. IPA's instruction is a combination of seat-based direct instruction, experiential learning, arts integration, and project-based learning. Teachers follow their students through multiple grades in first through sixth grade, a practice known as *looping.* Kindergarten teachers remain with kindergarten classes. Subject Specialists provide instruction in the arts, music and movement, further extending classroom instruction. Service Learning, Technology Literacy, and Sustainability Education programs are also integrated into core subjects.

IPA'S CURRICULA

The following table identifies curriculum used by subject and grade level.

Grade levels	**English language Arts**	**Mathematics**	**Science**	**Humanities (World cultures, history)**
k-3	Literacy By Design Enriched with Waldorf literature (fables, myths, cultural stories, legends, etc.)	Saxon Math	Utah Common Core State Standards FOSS kits National Geographic for Kids	Utah Common Core State Standards Waldorf supplemental curriculum
			Waldorf supplemental curriculum	
4-6	ReadyGEN Supplemented with Waldorf literature	Saxon Math	*See grades k3*	*See grades k-3*

DESCRIPTION OF PURCHASED COMMON CORE ALIGNED CURRICULUM

English Language Arts (ELA)

Literacy by Design (Houghton Mifflin Harcourt), is a research based balanced language arts and reading program co-authored by Dr. Robert Marzano, a leading educational researcher cited throughout this document. Providing a basal language arts program for grades k-3 gives IPA teachers the needed resources to comprehensively teach and meet all English Language Arts standards and a source around which to construct Waldorf multisensory, cross curricular, and arts integrated Main Lesson Blocks. IPA has chosen Literacy by Design because it teaches the five pillars of literacy -phonics, phonemic awareness, reading fluency, vocabulary, comprehension, as well as, writing and spelling through literature and themes conducive to the Waldorf humanities curriculum as well as the Utah Core Standards in science. It provides summative assessments, an intervention guide, and a rich fiction and nonfiction leveled classroom library. It integrates full group, small group, individual, and hands-on learning in alignment with Waldorf methodology while allowing flexibility for integrating art, music, and movement.

ReadyGEN (Pearson Publishing), is the latest Common Core aligned comprehensive literacy program structured around literature. The program comes with Teacher's Guides containing comprehensive lessons addressing ELA foundational skills, speaking and listening, and writing (ReadyGEN, 2015). Providing a literature based literacy program for grades 4-6 gives IPA teachers the needed resources to comprehensively meet all English Language Arts standards and a source around which to construct Main Lesson Blocks. Because ReadyGEN is not a scripted program, it allows flexibility for the integration of arts, music, and movement. The program has a balance of narrative and informational tests. This balance lends itself to Waldorf's method of cross-curricular integration of science, history, math, etc.

Mathematics

Saxon Math (Houghton Mifflin Harcourt), is a comprehensive, hands on proven math program implemented in grades k-6. Instruction is built around a combination of conversation, hands-on activities, and paper-pencil practice (Math, 2011). In grades k-2, instruction is teacher directed, but becomes more student directed in grades 3-6. The program is aligned to the Common Core State Standards through Teacher's Guides, as well as, supplemental materials. The nature of Saxon math- its emphasis on hands-on activities, manipulatives, conversation and practice- provides IPA teachers with guidance, flexibility, and tools that are in alignment with IPA's multisensory approach to instruction.

WALDORF CURRICULUM

Two organizations exist pertaining to Waldorf education; The Association of Waldorf Schools of North America (AWSNA) which pertains to private Waldorf schools, and the Alliance for Public Waldorf Education (APWE). Neither organization has developed Waldorf curricular programs that can be purchased and implemented into a school atmosphere. Instead Waldorf curriculum

is a comprehensive scope and sequence of tasks and content and the developmental stage at which content should be taught. This scope and sequence can be found in a book primarily used by private Waldorf schools: The Tasks and Content of the Steiner- Waldorf Curriculum. As Waldorf education has moved into the public sector, APWE has compiled the Waldorf-Common Core Curriculum Alignment and Handbook which is a comprehensive document aligning traditional Waldorf curriculum to the CCSS. IPA will refer to both resources for the scope and sequence of its Waldorf-specific curriculum and to ensure alignment to the Utah State Standards when applicable.

IPA's Waldorf- Specific Curriculum k-6

Humanities: The Waldorf humanities curriculum is the study of ancient and modern world cultures. It includes music, poetry, art, and literature. It acknowledges that the cultures of the past have influenced humanity throughout time and continue to influence the values and morals of today's world. Students learn about world religions and cultures from a historical perspective. Beginning in grade two, fables are taught; history and legends in grade three; Norse mythology in grade four; and ancient cultures of India and Egypt in grade five; and the cultures of Persia and Mesopotamia in grade six. By exposure to those cultures through their legends and literature, students gain knowledge of and an appreciation for diversity of humankind. By the close of sixth grade, students will have journeyed from Greece to Rome, through medieval history, the Renaissance, the Reformation, the Age of Exploration, up to the present day. These subjects may be integrated into Main Lessons in language arts and writing instruction, serve as the basis for research projects, or integrated into a project based math lesson. The performing arts curriculum described below is an integral part of humanities curriculum as these studies culminate into a class performance in second through sixth grade.

Art: Waldorf's art curriculum consists of visual, performing, and practical arts. Students learn to draw, paint, sculpt, and perform dramatic presentations. They also learn practical arts such as knitting, crocheting, sewing, and woodworking. These skills not only develop fine motor skills, coordination, and perseverance, but require students to think logically, mathematically and use creative problem solving.

Music: Waldorf's music curriculum consists of learning to read and compose music, sing, understand and create rhythms, and play the recorder and other instruments.

Science: Waldorf science curriculum is a scope and sequence of science content integrated with ecology and the natural world. It is an integral part of Waldorf education. It begins with nature stories in kindergarten and continues through the grades. IPA teachers create inquiry-based lessons using curricular resources (see table), labs, IPA's Landscaped for Learning schoolyard (described below), and field trips. Instruction is a balance of experiential learning and project based learning with systematic study of terms and concepts in life, earth, and physical science. IPA's approach nurtures curiosity as students practice observation and analytical skills. Students learn how scientists understand our world and how ongoing scientific advancements shape the world.

Movement Education: Waldorf education recognizes the importance of movement in cognitive development. A visiting artist from Tanner Dance (or another organization) will teach dance and movement. Teachers will be trained in how to incorporate movement into instruction solidifying IPA's multi-sensory education.

Service Learning: One of IPA's goals is to educate children in such a way that they are able to envision and create a productive and peaceful world as adults. Service to others contributes to a sense of self-sufficiency, self-esteem, and accomplishment. It strengthens qualities of self-discipline, perseverance, patience, and imagination. Community service is an intrinsic part of that goal. Each grade will participate in at least one service learning project per year along with one initiated schoolwide.

Sustainability Education and Nature-Based Learning: IPA educates the whole-child to see himself as living within the context of a whole environment. Whenever appropriate and relevant students will learn outside. IPA will be "landscaped for learning" where trees and flowers, and a garden provide learning opportunities for science, botany, art education and more. The schoolyard will boast an organic garden planted and maintained by upper grade students and will be used for science, health, and sustainability education. Children learn about plants, animals, ecology and the world around them through hands-on experiences as caretakers. They begin to internalize their connection to and responsibility to care for the natural world. This manual work with the earth and elements can also be therapeutic for the developing child who may have behavioral difficulties. Physical education classes and recess are always held outside unless weather or air quality is restrictive.

Technology Literacy: Besides using core curriculum and Waldorf-specific curricula, IPA intends to research and implement a program that teaches technology literacy. Students will learn ethics and internet safety, publishing, how to create multimedia presentations, basic coding, etc.

IPA'S FIDELITY TO AND REPLICATION OF WALDORF

There are three primary components of a Waldorf school that are incorporated into IPA: **Curriculum** (discussed above), **Methods of Instruction and Delivery**, and **Teacher Engagement**.

METHODS OF INSTRUCTION AND DELIVERY

IPA shows fidelity to Waldorf by implementing the following 15 hallmark methods of instruction and delivery regularly used in Waldorf schools to provide an innovative and rich experience that meets the needs of students with a variety of learning styles and achievement levels. In addition, these methods ensure quality educational outcomes and distinguish IPA from other college predatory schools that focus on textbook assignments, rote memorization, scripted curriculum, and singular modality of instruction.

1. **Looping:** Looping is the practice of a teacher remaining with the same group of students for more than one consecutive year. According to researchers, "the most important

variable in a positive elementary school program is the constant attention of a single teacher/caregiver with whom a child can develop a predictable and meaningful relationship" Looping saves an average of six weeks of instructional time at the beginning of each year. Classroom community is developed as students form strong bonds with their peers and teacher. This structure of continuity helps create a relationship of trust and understanding between student and teacher which is a hallmark of Waldorf education.

2. **The Main Lesson:** The day begins with the Main Lesson, a two-hour instructional period focusing on the core curriculum: math, language arts, science and humanities. Lessons are theme based and always include multiple objectives (at least 2) and are generally cross-curricular decreasing the compartmentalization of information and increasing student understanding of how concepts connect. A variety of learning approaches are used to facilitate learning through multiple modalities (visual, auditory, kinesthetic) with the purpose of reaching the whole-child and all styles of learners. Modalities include, but are not limited to: direct instruction, cooperative learning, project based learning, presentations, arts integration, movement, music, technology, hands-on, and nature based learning. For example, during a second grade science unit involving botany, the teacher may read aloud an informational text about flowers that grow in the desert. The teacher uses this text to teach adjectives and how to compare and contrast objects. Later the class may go outside to IPA's Landscaped for Learning Schoolyard, sit down with a clipboard and colored pencils to draw and scientifically label local flora, noticing their smell and surrounding ecosystem. Students may be assigned to think about the plant's role in nature, thereby capturing the notion of respect for the environment intended in science studies. Because inquiry is the cornerstone of both math and

   science at IPA, integrating both disciplines occurs whenever possible, therefore, the teacher has planned to integrate a math objective regarding geometry taught through the studying patterns and geometric shapes that show up in nature. Teachers in the older grades may use such an opportunity to introduce the Fibonacci sequence paving the way for higher-level mathematical study. In this way, IPA's curriculum and methodology invites students to practice a variety of skills and develop many capacities in an imaginative and more applied context.

3. **Main Lesson Block:** The 2-6 weeks of time consisting of themed Main Lessons that immerse students in subject matter
4. **Main Lesson Book:** A core feature of the Main Lesson is the making of a Main Lesson book. Each student produces a Main Lesson book for every block of study. What begins as a blank journal becomes an individual record of experiences, observations and gained knowledge, along with hand-drawn illustrations, and written reflection of learned content. In the scenario above, students draw and label the flowers in their Main Lesson Book. As a portfolio of work, a student's Main Lesson books reflect key objectives and skills a student has learned, while also displaying the student's inspiration.

Multidimensional, complex and thoughtful, Main Lesson books are an important way in which learning is expressed and can become an authentic assessment tool for teachers and a reference for students.

5. **Head, Heart, and Hands Lesson Structure:** Teachers use IPA's customized lesson plan template to ensure all lesson plans consistently exhibit the three pedagogical components of:
   The head- cognitive intellectual activity (associated with the left brain) focused around the Common Core State Standards and learning objectives.
   The heart - creating a connection or relevance to the learner through creative-intuitive activity (associated with the right brain) by integrating arts, music, movement, and nature.
   The hands- kinesthetic reinforcement or practical application of content generally resulting in a product or artifact.
6. **Focused Concentration:** The structure of the school day at IPA is attuned to the students' inherent biorhythms. The most intense and focused learning (Main Lesson) happens at the beginning of the day when the students are most receptive. The afternoons are typically used for outdoor activities, project-based or inquiry based learning, and special events.
7. **Teaching Through Narratives:** Instruction is typically literature based. This is achieved in grades k-3 through literature in the Literacy by Design ELA program and through ReadyGEN in grades 4-6. Both will be supplemented with literature from the Waldorf scope and sequence. History is taught initially through narrative and stories from a wide range of sources: fairy and folk tale, legend, fable, parables, mythology, and literature and then moves on to recorded history and historical fact. Teachers use biographies to strengthen students' identification with people who made a difference. Communicating, exchanging viewpoints, dialogue and debate are part of lessons.
8. **Sequential Cycling (whole to part to whole):** A robust body of research has signaled the trade-off made in many curricula in our high accountability context between teaching basic skills and knowledge and teaching higher order thinking skills (Darling Hammond, 2008). At IPA, "lessons move from the whole, or the big picture, through a story or image, to the part, or the specific skills to be acquired or practiced, and then back to the whole through artistic activity designing graphic organizers, engaging in projects, or writing essays to reflect on the whole. This movement from whole to part and back to whole means a lesson begins with synthesis and analysis and then moves to practicing recall and repetition, to come back to synthesis and analysis in the integration" (Oberman, 2010). IPA's purchased ELA and Math programs are in alignment with sequential cycling
9. **The Use of Imagery:** When presenting factual information teachers strive to present information with both a pictorial and emotional (heart) element. Teachers avoid abstract concepts throughout the early childhood grades (k-2) and stress the pictorial element that grows with students' changing understanding of the world. Teachers use

imagery that evokes strong sensory impressions and stimulates the imagination wherever appropriate in speaking to the children up to the second grade. Teachers transition to more abstract intellectual processes in third grade when the ability to think in abstract and causal terms begins to emerge. Starting late third grade, teachers adopt metaphor, simile, and comparison to create mental images.

10. **Application of Knowledge and Skills:** IPA teachers use Project-Based Learning- "a systematic teaching method that engages students in learning knowledge and skills through an extended inquiry process structured around complex, authentic questions and carefully designed products and tasks." Research shows that students engaged in learning through projects "construct solutions, thus shifting the emphasis [from the product] toward the process of learning" (Buck Institute for Education, 2004). This type of learning is in alignment with Waldorf's head, heart, and hands methodology, as well as, multi-sensory instruction. Further, students have the freedom to use multiple mediums such as art, music, and technology, to research, solve, and present solutions to given problems.
11. **Engaging Learning Environment:** A regular change of activities stimulates student's interest. Teachers balance concentration and relaxation, mental and practical work, movement, listening and participating, observing and doing. Each lesson balance cognitive, emotional/social, and active learning.
12. **Arts-immersion:** Visual and performing arts are integral parts of the daily curriculum. *See **IPA's Waldorf- Specific Curriculum k-6***
13. **Movement Education:** *See **IPA's Waldorf- Specific Curriculum k-6***
14. **Service Learning:** *See **IPA's Waldorf- Specific Curriculum k-6***
15. **Sustainability Education and Nature-Based Learning:** *See **IPA's Waldorf- Specific Curriculum k-6***

Instructional Overview

Instruction within IPA's curriculum is organized after the three primary Waldorf structures and routines:

1. The Main Lesson: *see **#2** above*

2. Practice Period: Taking place after the two-hour block, the practice period is when students receive differentiated instruction according to their individual needs.

3. Reinforcement through Specialty Subjects such as art, music, technology and movement, support the "heart, hands" portion of the Main Lesson.

The implementation of Waldorf Curricula and the 15 Methods of Instruction and Delivery described above, make IPA a Waldorf school. The following three deviations are what makes IPA a Waldorf "methods" school.

DEVIATION FROM WALDORF

IPA deviates from traditional Waldorf schools in the following three ways:

1. **Basal Programs**: The use of basal programs to create Waldorf Main Lessons is not typical of Waldorf schools. However, the practice is becoming more essential for public Waldorf schools as demonstrated by Waldorf- inspired district schools such as:

Alice Birney (k-8) - Sacramento County School District

Winn Elementary (k-8) - Sacramento County School District

Mariposa School of Global Education (k-8) - Las Virgenes United School district in Agoura, California.

As well, many charter schools such as the Winterberry Charter School in the Anchorage, Alaska School District and Community Schools for Creative Education in the Alameda, California School District use basal reading and math programs.

IPA uses purchased ELA and Math programs for the following reasons:

- The programs that IPA use are CCSS aligned. Using such curriculum ensures alignment to and meeting of the CCSS
- To ensure teachers have research based and comprehensive resources with which to create Waldorf Main Lesson plans
- To ensure students receive sequenced content that builds upon itself as they progress through the grades
- To ensure pacing common to traditional public schools for students transferring in or out of IPA (discussed below)

2. **Pacing:** Historically, pacing in Waldorf schools differs from that of traditional public schools. Some standards are addressed at grade levels different from those stated in the Common Core. For example, Waldorf kindergarten does not include reading instruction or assessment. IPA believes the Utah Common Core State Standards represents worthy goals in teaching literacy, higher order thinking skills, application of knowledge, and deeper understanding of concepts, therefore, reading instruction begins in kindergarten and follows traditional school pacing. This pacing continues into first grade and beyond. IPA's purpose of providing educational innovation aims not to alter essential content, but the methods by which it is taught. The key premise behind IPA's approach is that the power to accelerate learning does not need to artificially force students into their intellect and away from their heart and hands thus, fidelity to Waldorf's instructional methods is always shown.

3. **Technology:** Private Waldorf schools are typically "no technology" schools while some Waldorf public schools consider themselves to be "low" technology schools resulting in very little use or delayed usage until sixth grade. IPA's founders are well aware that 21st century students are "digital natives." They are growing up immersed in technology and it will continue to be an integral part of their adulthood. This reality makes technology a nature part of the whole-child. IPA will present technology as a tool of learning, creativity, and one of self-expression. Students will learn to code, create multimedia presentations, conduct internet research, publish their writing, etc.

TEACHER ENGAGEMENT

The third primary component of a Waldorf school that is incorporated into IPA is Teacher Engagement. IPA and Waldorf education views the teacher as the key text and source from which students learn. The role of the teacher is more than just dispensing information, rather the teacher is seen as an instructor, an expert, a mentor, an artist, and a professional.

Professional Learning Community (PLC): IPA teachers are highly collaborative and view themselves as part of a learning community dedicated to every child's success, not an isolated teacher concerned only for his/her group of students. They work collaboratively in weekly grade level meetings, referred to as PLCs, to plan Main Lessons, share ideas, discuss and analyze individual and grade level student data for the purpose of refining instruction to better meet the needs of students. Specialty teachers, as well as, Special Education teachers attend PLC meetings as a resource when appropriate. Teachers work with parents as partners for the purpose of shaping students' achievement and relationship to learning. Every two months, the entire faculty meets in a School PLC Data Meeting. During this meeting schoolwide data is analyzed and discussed after which a plan of action is made to support continued student growth or target areas for improvement. Each Monday, the Executive Director sets the tone for the week through a welcoming school wide assembly called the "Community Circle." During this time, teachers and their classes are recognized and celebrated for their excellence and hard work.

Lesson Planning: IPA teachers are collaborative and engaged in lesson planning. Although teachers are given ELA and Math programs to follow, they do not robotically follow a "script" that dictates what to say or the method in which to present content. Instead they use the program's content, materials, and pacing to craft Waldorf Main Lessons using IPA's own Head, Heart, and Hands Lesson Template. This template ensures fidelity to Waldorf instructional methods, as well as, the integration of the arts, movement, and technology.

Ample time is provided to classroom teachers for lesson preparation through the use of time when students are being instructed by specialty teachers, PLC meetings, and shortened Fridays. Once a Main Lesson Block (theme based unit) has been created, teachers submit it to an electronic databased. By doing this, IPA is building a database of Main Lessons to use and reuse. Once submitted, teachers can edit and refine the lessons as they choose.

PROFESSIONAL DEVELOPMENT

A recent study by the Rand Corporation, a leading research nonprofit, found that, "teachers matter more in student achievement than any other aspect of schooling." Further, "When it comes to student performance on reading and math tests, a teacher is estimated to have two to three times the impact of any other school factor, including services, facilities, and even leadership" (Education, 2012). The heart of Waldorf Education is continual personal growth and achievement thus, IPA teachers participate in ongoing professional development through a variety of avenues both Waldorf based and independent of Waldorf. IPA believes that teachers who continually refine their craft become master teachers who are fully engaged in student learning and school success.

Waldorf Specific Professional Development

The Waldorf method is well-established with a long history, therefore, many teacher development opportunities exist which IPA will utilize including:

- Online training
- Certification programs through colleges and universities
- Teacher conferences throughout the country
- Collaboration with the APWE or consultant for targeted training
- Mentorships with existing Waldorf charter schools inside and outside of Utah
- Collaboration with Rudolf Steiner College to provide professional development
- Waldorf training videos
- Collaboration with local Waldorf advocates

Supplemental Training in Alignment with Waldorf Methodology:

- Love and Logic behavior management program
- Service Learning
- Sustainability Learning and Nature Based Learning
- Purchased curricular programs
- Contract with experts in project-based learning for targeted training
- Contract with experts in multisensory lesson planning for targeted training
- Training from Tanner Dance or other experts on movement in the classroom
- Training in educating special populations and multiple intelligences
- Collaborate with local independent teacher trainers such as Mentor Solution, etc. for k-3 literacy training, etc.

In addition to monthly school wide professional development, the Executive Director will work with each teacher to create a personal professional development plan which includes objectives for teaching in the given academic year and a schedule for completing Utah State licensure (as appropriate), and other training opportunities.

Involvement of Teachers through Committees: Teachers play a supportive role to each other and participate in school governance through the Leadership Team, Student Success Team, and various committees throughout the year. The Leadership Team meets once a month and is made up of the Executive Director, one representative from each grade level, specialty teachers, and a representative from the Special Education department. This team helps determine professional development needs, student and schoolwide needs and is a mouthpiece for the faculty. The Student Success Team supports teachers in instruction that leads to student achievement and growth. It is made up the executive director, one teacher representative from the early grades (ki-3), one from the upper grades (4-6), and any specialized staff members such as the school psychologist, occupational therapist, or speech therapist. Teachers consult this group for support concerning struggling students who do not hold IEPs. The group may conduct a child study, recommend various methods for Tier 1 instruction, recommend various Tier 2 interventions, and provide other needed support to the teacher as he/she supports the student.

STRATEGY FOR SUCCESSFUL IMPLEMENTATION OF PEDAGOGY

Just as Waldorf schools have proven, throughout the world, their ability to develop successful academic environments for children, IPA also ensures an efficient and successful replication of the Waldorf model by: (1) replicating the three primary components of a Waldorf school (discussed above): Implementing Waldorf Curriculum, Methods of Instruction and Delivery, and Teacher Engagement (2) providing a holistic, meaningful and academically rigorous education focused around the Utah Common Core State Standards, and (3) meeting the performance goals set forth in Section 5, IPA will employ the following strategy of implementation:

Teachers Recruitment:

1. Actively recruit Waldorf trained teachers through colleges and universities offering Waldorf certification
2. Actively recruit local teachers interested in developmentally driven, arts integrated, whole-child pedagogy who are willing to be trained in IPA's model
3. Actively recruit local teachers with experience in multi-sensory, whole-child, or project based teaching
4. Hire specialty teachers who can masterfully incorporate the arts, music and movement into core lesson plans

Provide Needed Supports:

1. Ongoing Waldorf specific, as well as, general professional development as listed above
2. Monthly schoolwide professional development
3. Provide teachers with curriculum and programs on which to build head, heart and hands Main Lessons

4. Provide teachers with Waldorf lesson plan templates to guide them through the lesson planning process
5. Build a database of Main Lesson Blocks written by IPA teachers and accessible to all teachers
6. Assemble a robust teacher library full of resources for teachers to reference throughout the year in lesson planning
7. Provide mentorships for every teacher new to Waldorf methods, either with an outside consultant, or another experienced teacher in the school. Ensure that relationships with mentors begin prior to school opening and involve lesson planning and organization of the classroom schedule and environment.
8. Regularly evaluate and support teachers in meeting their personal goals and IPA's organizational goals.

Actively Seek Developed Resources and Supports

The founders of IPA understand the importance of a network of support in creating a successful school. Because IPA is replicating a globally successful model, there are extensive supports and resources available to facilitate overall school success. Two board members have, and are continuing to form, working relationships with the principals and Board of Trustees s of successful Waldorf charter schools throughout the country. Collaboration with the Alliance for Public Waldorf (APWE), has occurred during the writing of this application as well as the proposal. Once approved, IPA will seek memberships in APWE. IPA will continue to:

1. Collaborate with the Alliance for Public Waldorf Education
2. Collaborate with independent Waldorf consultants
3. Form partnerships/mentorships with successful public Waldorf schools throughout the United States with special interest to those that use basal ELA programs
4. Visit established Waldorf schools
5. Collaborate with existing Waldorf methods/inspired school(s) inside Utah

Before opening in the fall of 2017, IPA will provide a 2-week teacher training during the summer of 2017 to all incoming teachers. The training with be given by Waldorf experts, representatives from purchased curricula, and local teacher trainers. The training will focus on:

1. Waldorf philosophy, methodology, and curriculum
2. ELA and Math curriculum of the grade to be taught in the coming year
3. Structuring the main lesson block- At the end of this two-week training, each grade level will have constructed the first Main Lesson Block.
4. Integrating art, music, and movement into the classroom
5. Assessment

Each year thereafter, returning teachers will attend a week of professional development before school begins. New teachers will be required to attend two weeks one of which will focus on Waldorf philosophy, methodology, and curriculum.

During the planning year, 2016-2017, IPA's board will hire the Executive Director and a Curriculum Director. The Executive Director will collaborate with a Waldorf expert regarding best practices in Waldorf charter school start up. The Curriculum Director will collaborate with experts including Waldorf consultants and Pedagogical Directors of other Waldorf schools regarding lesson planning, arts integration, etc.

During the operational year, 2017-2018, the Executive Director will continue this collaboration, or one more suited to operational needs, in order to support the organization and the faculty. The Curriculum Director will collaborate with experts as needed.

RESEARCH BASED PROVEN EDUCATIONAL OUTCOMES

Dr. Mary B., 2009's *Transformational Teaching: Waldorf-inspired Methods in the Public School* specifically addresses Waldorf education in the public setting. Goral looks at public school teachers who implemented Waldorf-inspired teaching into their urban classrooms in Louisville, Kentucky. This qualitative study found that students in these classrooms were more engaged in the learning process and were happier in school. Teachers reported that methods inspired by Waldorf education helped them build strong classroom communities and kept the teachers' passion for teaching alive (Goral, 2009).

In "Learning from Rudolf Steiner: The Relevance of Waldorf Education for Urban Public School Reform," a study published in 2008, researcher Ida Oberman concluded that the Waldorf approach successfully laid the groundwork for future academics by first engaging students through integrated arts lessons and strong relationships instead of preparing them for standardized tests. In her assessment of four California public schools that use Waldorf methods, Oberman conducted a study comparing standardized test scores between Waldorf Charter Schools and schools of similar demographics in California. This study showed that 2nd Grade Waldorf students perform slightly below their peers, while 4th Grade students are about equal in performance. By 8th Grade, the Waldorf students matched the top 10% of their peers and far surpassed the average scores on the California Statewide Tests (Oberman, 2010).

In a more recent 2011 study, public Waldorf schools were compared to traditional public schools using their district standardized test scores in reading and math. Test score results suggested the Waldorf experience provided a slower academic build-up resulting in lower test scores in the early grades followed by higher levels of advanced performance by the eighth grade (Larrison, 2012).

As mentioned earlier, IPA will deviate from typical Waldorf practice of delaying early literacy. Mariposa School of Global Education is a k-8 Waldorf-methods school created by the Las Virgenes United School district in Agoura, California. Mariposa, like IPA, has opted to include

reading instruction in their kindergarten curriculum without sacrificing play and project based learning. This approach continues through first and second grades and is supported by proficiency scores that show Mariposa second graders score above the state average in English language arts as indicated by the California Standards Test (Great Schools, 2015). IPA anticipates like results as we accelerate early reading.

Specific of Waldorf Charter Success

The Waldorf method has been replicated over the past 20 years in over 60 public charter schools in states from Alaska to Florida.

One example of the success of this replicable design is Stone Bridge Charter School (SBCS) in Napa, California serving grades k-8. Originally known as Napa Valley Charter School, SBCSs charter was granted by the State of California with Twin Ridges Elementary School District acting as sponsor in 1998. In 2004, in response to a change in state law requiring charter schools to be authorized by their local district, the school embarked on a process to update the charter and to apply to the Napa Valley Unified School District for local authorization. During this process the school changed its name to Stone Bridge School. Since then, SBCC's charter has been renewed twice, once in 2010 and again in 2015. The school enjoys a student retention rate of > 96% and an attendance rate of > 96%. SBCC has consistently attracted highly qualified teachers and has a stable administration, solid Board of Trustees, and supportive community. The school has grown both academically and in population. This shows in their academic standing. While the school-wide (grades 2-8) Academic Performance Index score (based on STAR tests) was just above the state target at 801 for the last testing year of 2013, their middle school score (grades 6-8) was 883. This is based on the pacing and age appropriate/more gradual introduction of academics in the Waldorf curriculum as compared to current mainstream public schools. SBCC's middle school scores continue to rise while the mainstream public middle school scores typically flatten or decline.

This following data is based on STAR and demonstrates how well students are doing in relation to the state content standards. On each of these assessments, student scores are reported as performance levels for the entire school with the percent describing the rate of students scoring at Proficient or Advanced (meeting or exceeding the state standards).

	Stone Bridge			**District**			**State**		
Subject	**2010-2011**	**2011-2012**	**2012-2013**	**2010-2011**	**2011-2012**	**2012-2013**	**2010-2011**	**2011-2012**	**2012-2013**
ELA	61%	73%	60%	53%	56%	52%	54%	56%	55%

Math	66%	67%	51%	48%	49%	46%	49%	50%	40%

Another example is the Journey School located in Aliso Viejo, CA. Journey opened in 2000 with 90 students in grades K–3 growing the total school to 240 students grades K–8 by 2007. They have had their charter renewed by Capistrano Unified School District twice; 2005 and 2010. These renewals and current student achievement data demonstrate Journey's consistent trend in performing above the state average. As above, the following data is based on California's "STAR Program."

	Journey			**District**			**State**		
Subject	2010-2011	2011-2012	2012-2013	2010-2011	2011-2012	2012-2013	2010-2011	2011-2012	2012-2013
ELA	64%	74%	74%	73%	75%	74%	54%	56%	55%
Math	65%	65%	74%	66%	67%	65%	49%	50%	50%

This data is consistent with much of the data from other Waldorf schools: students have, at times, lower test scores in early grades, but as they grow through the curriculum the solid foundations of earlier grades are revealed in ever-increasing levels of proficiency.

DIRECT OBSERVATIONS OF WALDORF METHODS

IPA's board Vice President, **Chris Allen**, began observing Waldorf education in the early 1990's. He is a founder of The Arizona Council for Waldorf Education, an organization that has assisted with the founding of eight schools in Arizona, six of which are public charter schools. One of these is 21- year-old Desert Marigold School (DMS) a K-12 charter school in Phoenix, AZ. The following describes his direct observations at DMS as well as other Waldorf-inspired charter schools in Arizona:

Waldorf is truly a holistic model of education. Students learn foreign languages, play several musical instruments, participate in the fine arts, knit, construct a modest building, and have gardening experience, in addition to a rigorous education providing them with an ability to advance as far as they can go. A recent MIT President was Waldorf educated and one of many examples of successful Waldorf students.

Parents love the Waldorf way. My own children had a traditional education supplemented with

Waldorf-inspired parental teaching and have done extraordinarily well. My oldest son is a Harvard graduate who has won multiple awards and scholarships and the Director of Education in Southern California. My other children are educators with advanced degrees and honors. I owe their dedication to learning and well roundedness to Waldorf methodology.

Waldorf educated children are "pro-active" in their approach to all facets of life. The majority have a true "can-do" attitude and a love and thirst for education that permeates the school site.

Waldorf classrooms are engaging and dynamic; full of activity where children are learning by doing or are fascinated by a story they are listening to, and experiencing in a variety of ways.

My wife is a Waldorf teacher. They are truly engaged and teach out of love for and belief in a system that has worked and continues to work.

IPA's board Secretary and Authorizing Agent, **Dena Lundgreen**, is deeply devoted to Waldorf methods in the public realm and has the following to say concerning her experience with the methodology:

As a teacher in district, charter, and private schools, I have successfully implemented Waldorf methods in my classrooms ranging from kindergarten to fifth grade and populations ranging from high socio-economic status to severe poverty and high English language learners. None of these schools were Waldorf schools. The methodology is simply best practices in alignment with how the brain learns and is conducive to all learners and circumstance. I have used the methods with curriculum I have created myself, as well as, created "head, heart, and hands" lesson plans around basal language arts programs. Currently, as a mentor for new and struggling teachers in one of the lowest performing schools in Utah, I often coach teachers to implement aspects of Waldorf methodology (multisensory instruction, art, music, movement) into their core instructional practice. When teachers change instruction to include the elements above, behavior issues lessen and student engagement increases resulting in desired student outcomes. I have seen and experienced, first hand, how Waldorf methods change the classroom, its students, and the teacher in positive ways.

APPROACH TO STUDENT DISCIPLINE

Love & Logic

In support of IPA's mission to create secure students strong in the capacities of thinking, feeling, and willing and in alignment with Waldorf's child-centric approach, IPA's core discipline procedure and policy will follow the proven Love & Logic philosophy of discipline which is: Each student is a unique individual with unique developmental, social, and educational needs. As a result, every disciplinary situation becomes unique in nature Consequences for misbehavior provide the best learning value when matched to the unique student and the unique situation. The odds for students learning from their mistakes and changing their behavior increase dramatically when they see a reasonable connection between their behavior and the resulting consequences.

By implementing Love and Logic IPA's approach to discipline will:

- Place the teacher in control of instruction and empower students to make responsible choices and decisions
- Require staff members to focus on relationships, building respect and positive rapport with students
- Enhance student self-concept by nurturing behavioral competence and responsibility
- Encourage self-regulation, thinking, and good decision-making
- Hold students accountable for their choices through the use of empathy and logical consequences
- Teach students problem solving skills
- Prepare students to function effectively in a society filled with temptations, decisions, and consequences

Because Love & Logic will be the school wide approach to discipline and in support of Waldorf's emphasis on rhythm and consistency, faculty, staff, and administration will participate in comprehensive and on-going training in Love & Logic methodologies. All adults will implement the 9 Essential Skills of Love & Logic when interacting with students. By doing so, the needs of all students will be addressed through creating a caring classroom and school culture, building connections within the classroom and all areas of the school, and building student competence for problem-solving and decision-making.

Service Learning

IPA believes as Dr. Marvin Berkowit who said: "Effective character education is not adding a program or set of programs to a school. Rather, it is a transformation of the culture and life of the school" (Good Character, 2015). Thoughtfully implemented, service learning develops citizenship, responsibility, and many other character virtues, making it a highly effective character education program in and of itself. All classes will incorporate aspects of service learning into their class curriculum, as well as, participate in one formal project per year.

SAFE AND ORDERLY CLIMATE

IPA believes that the climate and culture of the school must consistently maintain a feeling of safety for all students. The school wide implementation of the Love and Logic philosophy coupled with the holistic Waldorf philosophy, supports a culture that models, nurtures, and sustains a school climate where students feel emotionally, intellectually and physically safe. IPA will adopt a student Code of Conduct that aligns with Love and Logic's goal to encourage students to take responsibility for their actions and develop self-discipline. IPA will hold all students, employees, and other adults to the highest standards of behavior on school property

and during school-sponsored activities. Recognizing that threats to safety may occur despite best efforts, a school safety audit, performed by an outside school safety expert will be conducted before the school opens and annually thereafter. We will also follow the self-assessment program developed by safeandsoundschools.org. The Executive Director will be designated as the lead safety officer and will develop a staff-based school safety committee. This committee will meet regularly, hold trainings, and conduct drills to ensure an orderly response from students and employees in the event of an emergency.

CODE OF CONDUCT

All students, faculty, and parents will conduct themselves in a manner that contributes to a productive, safe, happy, inviting learning environment for themselves and others. Behavior expectations will be posted in their relative areas –bathrooms, halls, classrooms, lunchroom, etc.

1. **Be Safe** Examples: Walk orderly and quietly in hallways, follow playground and lunchroom rules. Students will not bring to the school nor use any harmful or illegal items or substances while on school property or at an event sponsored by or affiliated with the School.

2. **Be Respectful** Examples: Show kindness, use polite language, be truthful and honest, share and help each other, take turns, solve problems peacefully.

3. **Be Responsible** Examples: Keep a neat work area, take care of building, playground, and supplies, borrow only when necessary, and take care of other people's property. Electronic toys, games, and other personal equipment are not allowed at school. Such items are a disruption. IPA cannot be responsible if they are lost or stolen.

4. **Be Ready** Examples: be prepared for class, be attentive, do your best work, respect other learners, be on time, have good attendance, honor school dress code

CLASSROOM AND SCHOOLWIDE DISCIPLINE

One of the central aims of IPA is that all of the children will have the opportunity to experience the benefits of the curriculum in an environment that encourages their potential and fosters self-esteem and wellbeing. Certain expectations of the students are therefore essential to achieving these aims. Student attentiveness, cooperation, punctuality, an attitude of readiness, and respect for adults, peers and property must be sought at all times and at all levels of student participation at school. In situations where these expectations are not met, the following Progressive Discipline Process will be followed:

Step 1: Using Love and Logic principles teachers will seek age appropriate, class-based interventions, which redirect inappropriate behaviors into more successful behaviors with the least disruption to the class and which are least restrictive to the individual involved. Involving parents during this step is at the teacher’s discretion.

Step 2: If the student continues to behave inappropriately despite the class-based interventions, the teacher will use an office referral/behavior report detailing the situation and will send the student to the office. The teacher may request that the student speak to the administrator (or the administrator's designee) and may request that the office referral/behavior report be signed by the parents and the student and returned to school the subsequent day.

In addition to this progressive response to specific behavioral incidents, chronic discipline issues may require an individualized behavior support plan (BSP). In these cases, the teacher will create a plan designed to meet the specific needs of the child, with the help of remedial, resource, behavior or movement specialists or other professionals as necessary.

Step 3: Students who engage in dangerous or disruptive conduct may be subject to discipline, and potentially to suspension or expulsion as outlined in the IPA's comprehensive Suspension and Expulsion Policy

BEHAVIOR POLICY AND STUDENTS WITH DISABILITIES

The Executive Director will be responsible for understanding the legal requirements for discipline in relation to students with disabilities. In most cases, behavioral expectations will be the same for all students unless the behavior is a manifestation of a student's disability and/or special considerations have been made relative to a student's IEP. Ultimately, ensuring the safety of all students and school personnel will be our first priority. IPA will adhere to state and federal law for students with IDEA plans. If the pupil qualifies as a disabled student under IDEA, or if the student has a 504 plan or is currently being evaluated for special education services, suspension must follow all applicable state and federal laws regarding students with disabilities. The special education team (including parents, school director, special education director, and school counselor) must ensure that any disciplinary or suspension procedures are aligned with the student's IEP and are carefully documented. When making decisions on behavioral interventions for students receiving special education services, the IEP team shall refer to the USOE Special Education Least Restrictive Behavior Interventions (LRBI) Guidelines for information on research-based intervention procedures.

PARENT ENGAGEMENT IN SCHOOL CULTURE

Parent involvement is vital to Waldorf education as well as the existence of charter schools. As such, families will have many opportunities to become involved in their child's education, as well as, school governance. Families will be strongly encouraged, but not required, to contribute at least 4 hours of volunteer service per child to the school each month. Family volunteer hours will not affect student opportunities to participate in activities nor their grades.

- IPA will encourage an inclusive and collaborative environment with parents by: Implementing an Open Door policy where parents are always welcome to conference with administration

- Holding parent orientation meetings prior to the beginning of the school year
- Providing a Student/Parent Handbook at orientation that will include a section outlining parental obligations and opportunities for involvement
- Soliciting feedback and information from parents through surveys and focus groups
- Keep parents consistently informed through social media, e-mail, the school's website, phone calls and flyers, as well as a monthly school newsletter
- Provide opportunities to participate on school committees and the Board of Trustees
- Provide parent education nights and workshops that give families first-hand experience with the Waldorf philosophy and curriculum
- Enrichment nights with specialty teachers (art, music, drama)
- Invitations to attend school festivals, celebrations, exhibits and performances.
- Parent-Teacher Conferences, allowing open communicating regarding student progress and challenges.

Parent Guild

Parents will have the opportunity to engage in the school's community through the Parent Guild. The Parent Guild will meet monthly to plan and coordinate efforts to involve families in a vibrant school community. Members of the Guild will:

- Oversee student-related activities at the school
- Help with recruitment of students and families
- Oversee use of volunteers within the school
- Direct various aspects of the school, such as gardening, handwork.
- Provide Board of Trustees and administration insight into student needs
- Coordinate IPA's community partnerships
- Assist in fund-raising and festivals

SECTION 5
PERFORMANCE MEASURES

While IPA anticipates that its educational program and methods of instruction will have a particular appeal to educationally disadvantaged students and intends to provide high quality opportunities to these subgroups, we will not specifically recruit and do not anticipate enrolling a larger population of these students than the percentage at surrounding schools. Should IPA's population of students with special needs exceed the anticipated threshold, IPA may seek to work with the State Office of Education on approving the use of an Additional Measure of Comprehensive Performance.

Outcome Based Goals

Measure	**Metric**	**Board Goal**
Language Arts	The percentage of students attending a full academic year in grades 3-6 who are proficient on the SAGE Language Arts end	Year 1 60% Year 2 70% Year 3 80% +
Reading Proficiency	The percentage of students in grades 1 and 2 attending a full academic year in grades 1-3 who are determined to be reading at grade level according to the DIBELS end of year assessment.	90%+
Math Proficiency	The percentage of students attending a full academic year who are proficient on SAGE Math end of year test	Year 1 60% Year 2 70% Year 3 80% +
Writing Proficiency	The percentage of students attending a full academic year who are proficient on SAGE Writing end of year test	Year 1 60% Year 2 70% Year 3 80% +
Science Proficiency	The percentage of students attending a full academic year who are proficient on SAGE Science end of year test	Year 1 60% Year 2 70% Year 3 80% +

Mission Specific Goals

Measure	Metric	Board Goal
Art and Music Integration	Percentage of teachers integrating art and/or music into at least 50% of their instruction (including student practice) after 2 years in operation as indicated by Administrative observation and curriculum maps	100%
Lesson Planning	Percentage of teachers creating and implementing head, heart, and hands Main Lessons as indicated by administrator observations and written lesson plans	100%
School Community	Percentage of grade level teams meeting weekly in data driven Professional Learning Communities as defined by the PLC record and administrator observation	100%
Service Learning	Percentage of students participating in 1 Service Learning project in grades K-6 per year after 2 years in operation as indicated by grade level curriculum maps	100%
Parent Satisfaction	Percentage of parents satisfied with IPA's performance after 2 years in operation as indicated by the end of year Parent Survey	90%+

APPROACH TO ASSESSMENT

IPA believes assessment is:

- An ongoing process that helps identify, at various stages in the learning process, what a student knows, understands, and can do.
- Vital for a clear understanding of overall school performance
- A collaborative process (i.e. common formative assessments,)

- Should be a process that encourages, challenges and motivates students to higher levels of learning and self-awareness
- Multiple types of evidence must be used to better understand each learner's strengths and needs, and to plan for support and enrichment.
- Should allow students authentic opportunities to display their accomplishments and demonstrate their learning

EVALUATION OF STUDENTS

IPA evaluates the progress of students by ongoing formative and summative assessments, administered at appropriate intervals. Formative assessments provide regular and timely feedback regarding student attainment of standards, which allows teachers to modify instruction to better meet the diverse learning needs of all students. Formative assessments are not punitive nor are they generally used to determine a final grade. Summative assessments are accountability measurements that identify whether or not a student has mastered a standard or objective. They are generally used as part of the grading process.

IPA's assessments include, but are not limited to:

Common Formative Assessments: Grade level teams collaboratively design these interim assessments to measure student progress towards mastery of objectives/standards included on benchmark assessments. Such assessments can take on a variety of characteristics such as traditional pencil and paper tests, teacher observations, discussions, task completions, student reflections, etc.

Progress Monitoring (formative): Teachers utilize progress-monitoring tools to track student learning, assess and improve both remediation and extension practices, to refine tiered instruction, and strengthen Response to Intervention.

Benchmark Assessments (summative): Student growth towards and proficiency of standards is measured through a beginning of the year, middle of year, and end of year benchmark assessment. Such assessments are generally included in purchased ELA and math basal programs.

Portfolios (summative): Comprehensive student portfolios include work samples such as Main Lesson books, final papers, written work and reports, artwork etc.

Projects/artwork (summative): Both individual and group projects are assessed using a rubric

Curriculum-based Assessments (summative): Teachers administer curriculum-based assessments such as end-of- unit assessments, spelling tests, etc.

State-mandated Assessments (summative): such as DIBELS, SAGE, etc. IPA is committed to complying with all state testing requirements and meeting or exceeding state goals. Recognizing that testing requirements and windows can and may change. IPA's plan for

completing the assessment requirements for Utah public schools is driven by information received through the Utah State Office of Education. IPA's Executive Director will ensure that all statewide assessment policies and procedures are adhered to and implemented appropriately.

DATA USE AND COLLECTION

IPA uses the above formative and summative assessments to collect data. Once collected, the data is used for the following:

1. Drive Tier 1 instruction, remediation, reteach, and challenge activities.
2. Evaluate teacher effectiveness.
3. Evaluate program efficacy and implementation.
4. Evaluate fulfillment of the Charter School Performance Standards and site goals, as well as, goals in the charter agreement.
5. Assess overall school performance.
6. The Leadership Team in tandem with administration will use data to determine school wide professional development needs.
7. Grade level teams and individual teachers will data to identify and customize any needed professional development.

MANAGING AND REPORTING STUDENT PROGRESS

IPA intends to research (or possibly develop) a data management system such as Aspire, to manage grades, assessments, report cards, attendance, behavior, etc.

Student progress is reported to parents through formal and informal parent teacher conferences and frequent progress reports.

POLICIES AND CRITERIA FOR GRADE PROMOTION

IPA will adopt the traditional class configuration. Students will be organized in homerooms by grades based on their age. Advancement from one grade to the next will happen annually on a traditional school schedule. A student satisfactorily completing each grade's work will be promoted to the next grade. Graduation from the school occurs when a student has completed the final year offered by the IPA (Grade 6).

Grade Retention and Advancement

Grade level retention or advancement are discouraged except under extreme circumstances based on individual student need. Advancement or retention decisions shall be made after the following have been implemented:

a) Teacher(s) adapting teaching strategies and curriculum to meet the learning and instructional needs of the student

b) Teacher(s) keeping written records of the student's performance

c) Teacher(s) meeting with parents when advancement or retention is under consideration

d) Parents meeting with the executive director to provide input regarding the desired change

e) Review of the request by the Local Case Management Team, which includes at a minimum, current classroom teacher, school administrator, school psychologist, and a representative from the special education team.

f) Final placement decisions remain with the LCMT.

The advancement/retention provisions of this policy are not applicable to special education students being served under a special education Individualized Education Program (IEP). The student's IEP Team must make placement decisions for such students.

EVALUATION OF SCHOOL

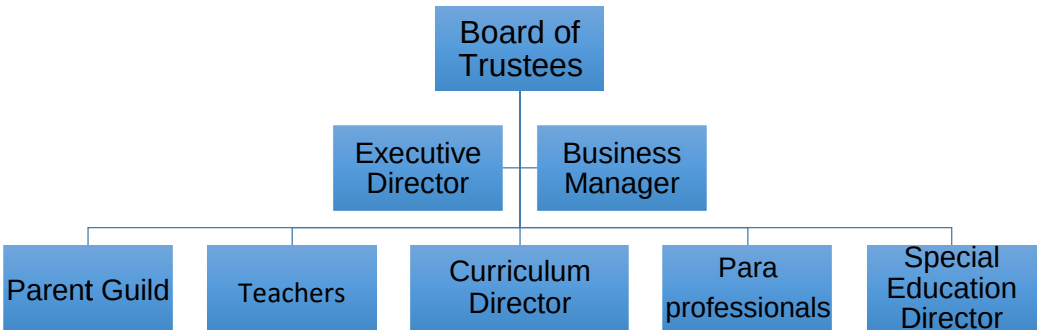
IPA will engage in an annual Strategic Planning Process at which time the Board will evaluate the school's progress towards meeting the mission, vision, performance measures, Charter School Performance Standards and goals set forth in the Charter Agreement. Criteria to be determined by the Board of Trustees in harmony with accepted school accreditation standards. The board may choose to consult a Waldorf expert to help evaluate the implementation of Waldorf methods within IPA's program of instruction. Further, the board will analyze overall school performance using data from:

1. Student achievement
2. Teacher evaluations
3. Parent and student surveys
4. Teacher surveys and input

The board will also evaluate itself and the executive director using criteria to be determined.

SECTION 6
Governance

ORGANIZATIONAL STRUCTURE OF IPA



ORGANIZATION AND ROLE OF BOARD OF TRUSTEES

Governed locally by citizens, parents, and educators, charter schools are free to be innovative in their design and are highly accountable to the community. IPA will be operated by a Board of Trustees whose primary task is to set policy and clear standards for success with specific performance outcomes for achievement. Teacher salary increases are tied to school wide improvements and achievement, as well as, parent satisfaction and student retention. In other areas of the school program, continuous school improvement plans are used to address other school goals and staff responsibility for achieving those goals. A board comprised of parents, community leaders, and experts in various fields will operate IPA. The Board has fiscal oversight responsibility and long-term decision-making obligations. In addition to evaluating the progress of the school and its director, the board members create policy, review financial information, make key budgetary decisions, hire and evaluate the director, and set short and long-term educational goals.

Board Duties and Obligations

The board believes that mission and vision statements should guide the day-to-day operation of the organization and should dictate every decision made. Developing systems to ensure the growth of the school is a shared responsibility of the board and the school's director, and will assist in maintaining continuity between the organizing board's vision and that of future Board of Trustees s.

Founding board officers (president, vice president, secretary, and treasurer) shall serve one year terms with no limitations as to number of terms served. Officers shall be selected at the last regular meeting of the calendar year. Secret ballots representing a majority of votes cast shall determine the selection of officers for a given term. Meetings shall be held monthly from August to June, the second Thursday, but may occur more frequently during start up as determined by the seated Board. Board meeting notifications will take place utilizing the school's website, and the school's physical facility. Minutes shall be noted and forwarded to the necessary parties.

The Board of Trustees shall further the goals and objective of IPA as reflected in the mission statement, as well as, throughout the charter application. The Board of Trustees shall provide leadership, guidance, oversight, knowledge, and experience to the administration, faculty, students and parents. The board will provide an annual progress report for all because constituency and stakeholder groups. The Board of Trustees shall have power over and control of the business affairs as provided for in Utah and federal law and in the articles of incorporation.

Board members shall perform their duties, including those as a member of any board committee, in good-faith, in a manner reasonably believed to be in the best interest of the school, and with such care as an ordinarily prudent person in a like position would use under similar circumstances.

For purposes of encouraging full participation of the Board of Trustees, each board member is expected to fulfill the following duties and obligations:

1. Be knowledgeable about essential documents binding or affecting the academy, including the charter school application, the charter school contract and any amendments, school budgets, and board and school policies and procedures.

2. Maintain the confidentiality of discussions in the executive session and where necessary to preserve the confidentiality of personnel matters, parents and children matters, and school business.

3. Respect and adhere to the lines of communication established by the board as to any specific matter requiring an official spokesperson on issues involving the media, outside agencies, mediators/arbitrators, and/or attorneys. In the event individual board members are contacted for information, where the board designates an official spokesperson, members are requested to defer to the chosen spokesperson.

4. Recognize and act in accordance with all board approved school policies, including those established to ensure the daily orderly operations of the classrooms and classwork.

5. Board members are expected to maintain discretion and act in a professional manner at all times when dealing with board business or raising school issues, including adherence to the board's conflict of interest policy as articulated in its bylaws, and any related policies adopted by the Utah state school board or office of education, or the IR

Delineation of Roles of the Board of Trustees and Executive Director

The following chart describes the roles and responsibilities of the IPA's trustees and administrator. IPA will review the chart annually and updated if necessary.

Responsibility	**Board of Trustees**	**Administrator**
Legal	Exercises fiduciary role to ensure that the charter school is properly managed. Maintains legal status; insures the proper paperwork is submitted to governmental agencies. Reviews financial and business dealings and exercises proper judgment in self-dealing transactions -- avoidance of conflicts of interest.	Must provide information to the board to demonstrate that the charter school is well managed. Compiles information for annual filing requirements. Signals to the board if either of the situations is likely to occur.

Finance and Accounting	Approves annual budget.	Prepares annual budget with input from staff and finance committee
	Reviews periodic financial reports (balance sheet, income statement, changes in financial position). Ensures that proper internal controls are in place.	Oversees preparation of periodic financial reports. Implements proper financial controls.
Planning	Establishes mission and program direction for the charter school and approves goals and objectives designed to achieve those ends. Reviews strategic plan and progress. Assesses compliance/progress in achieving educational and other outcomes agreed to in the charter contract. Assesses program evaluation plan.	Participates in establishing mission and program direction for the school. Contributes to vision of the charter school; and assists the board in maintaining focus and momentum toward the goals Develops specific program goals and objectives based on the board specific mission. Develops reports or oversees staff development of reports to demonstrate program progress.
Policy	Develop and adopt written policies Responsible for reviewing policies periodically	Identifies need for new policies Responsible for assuring the implementation of policies and for assisting the board in analyzing policy options

Personnel	Sets and reviews personnel policies. Hires Charter School Administrator and Business Manager and evaluates their performance.	Implements personnel policies. Recommends changes in personnel policies to the board. Hires/fires all personnel and evaluates performance of staff members

Member Composition

There shall be a minimum of five regular voting members of the Board of Trustees consisting other volunteers from the community who are committed to realizing IPA's mission and vision as articulated in the charter. This will be a professional board. Trustees may be parents of students, but there is no requirement that at least one trustee be a parent of a student.

A simple majority of the current board constitutes a quorum of the board (for example, three of five and four of six or seven). This is required for all meetings and votes. If any two members of the board are related, each individual shall be counted towards constituting a quorum; however, for voting purposes, if both individuals are present, each shall have one–half vote. All Board of Trustees members shall be required to complete professional development including compliance with the open meetings law training and other training as determined annually by the board. IPA's director shall be a non-voting member of the Board of Trustees.

Procedures for Selection of New Board Members

The founding board will consist of at least five individuals, as identified in the charter application and as listed in the minutes of IPA's organizational meeting of the Board of Trustees. This board will provide governance and oversight during the development and implementation process.

FOUNDING BOARD MEMBERS

Bill Brown- Board Chair

President of Impact Navigators LLC

Bill is a successful businessman and entrepreneur with vast experience and board membership, new business development, nonprofit organizations, strategic planning, finance, human resources, sales and marketing, among the plethora of other things. He is a master at fulfilling mission and vision statements. He believes strongly and community, Sustainability, and education. His broad range of expertise and experience will keep IPA financially sound, academically aligned, and legally compliant.

Chris Allen –Vice Chair

Vice President Gains Corporation

Chris is deeply devoted two IPA's success. He has been involved in Waldorf education for 25 years. As a founder of the Arizona Council for Waldorf Education he has a comprehensive understanding of Waldorf education and Waldorf charter schools. He is a parent of Waldorf educated children and the husband and father of Waldorf educators. His connection with and knowledge of the public Waldorf community will be especially invaluable as IPA begins to recruit teachers, research curriculum, and create relationships with and visit Waldorf charter schools around the country. He is excited to bring an educational philosophy, in which he believes deeply, to the children of Utah County.

Dena Lundgreen- Secretary

K-3 Literacy Coach Granite School District

Dena has over 12 years of experience in education. Along with earning a Utah Principal's licensure, her dream has been to write a k-6 Waldorf-inspired charter. She taught in various charter schools in the valley, and was lead content designer for a local international curriculum company. Her expertise in data and assessment, curriculum and instruction, teacher mentoring, child development, school supervision, and Waldorf methodology will continue to be invaluable in IPA's development and sustainability. She attended Brigham Young University and lived in Provo for twelve years of her life. Her love for and connection to the Provo community drives her commitment to IPA's success.

Gayla Gallacher- Treasurer

First National Bank

Gayla's expertise with finance is vital to IPA's development and sustainability. She will ensure that IPA begins and continues to be financially sound and that financial decisions are ethical, legal, and in the best interest of the school and the students it serves.

Tom Nied- Voting Member

CEO of Impact Navigators LLC

Tom has a broad base of experience in executive management, turn-around businesses, entrepreneurial and start-up businesses, new business development, marketing and sales, finance, operations, human resource development, strategic planning, teaching, and mentoring. His vast experience will support IPA in marketing and recruiting, hiring, and finance.

Lyndsay Huntsman- Voting Member

Director of the Park City Center for the Advancement of Professional Studies

Lyndsay is a successful and innovative veteran educator with both classroom and administrative experience. Her experience in staff development and hiring, stakeholder involvement, school budget and funding, data, instruction, and curriculum will help drive and support IPA's development.

Shawn Potter- Voting Member

Managing Partner Wasatch Law Group

Shawn is a successful attorney who has experience in real estate and construction industries, businesses matters, and related litigation in both public and private proceedings. His expertise in law will ensure IPA is and continues to be legally compliant in all areas before and after charter approval.

IMPLEMENTATION AND DEVELOPMENT OF SCHOOL PROGRAM

IPA's founding board fully understands the mission of the school and is committed to continually expanding each member's understanding of the school's whole-child educational model. It is well constituted to navigate to school through the conceptual development process. Outside expertise or professional guidance will be sought as needed. As IPA proceeds to the implementation process, the current board will seek to identify other individuals who would add complementary strength or expertise to strengthen the board's overall capacity. The board is receptive to applications for membership at any time. A nominating committee may consider applications prior to consideration by the full board. Appointments will be made in public meetings by discussion and vote of the board. However, new appointments will generally be made in conjunction with the annual meeting at which time the terms of roughly 1/3 of the existing board members expire. Prior to the expiration of the existing term, and/or to fill vacancies, the board may designate a board nominating committee, responsible for establishing the procedures and timeline for soliciting and interviewing candidates to fill new terms. If the nominating committee does not convene and/or fails to fulfill its duties the board itself shall be responsible.

Annually, the board will determine officers in an open public vote of the majority of the quorum. With the knowledge that board members also have responsibilities outside of the school, all interested parties should give careful consideration of the demands on board members. Board applicants must exhibit strong moral behavior and be willing to give of their time, energy, and abilities to help the school achieve its stated mission and purpose. Board applicants must demonstrate an ability and willingness to attend all board meetings and to work with other board members, staff, faculty, and others in achieving specific goals or completing projects adopted by the board. New board members will be elected by public vote of the board once candidates are interviewed.

In the event of a midterm vacancy of a board position, replacement applicants may be sought and will follow the existing selection procedure described above.

OPEN AND PUBLIC MEETING LAW

Board members shall abide by Utah's Open and Public Meetings Act (Utah Code Ann. §§ 52-4101 et. seq.). The open meeting law states that discussing board business, policy, actions, resolutions, etc. between three or more board members except at regularly scheduled meetings is illegal. "Meeting" with another board member is defined as communication through person, telephone, or any other means. Confidentiality must also be maintained. Personnel matters, individual students, and negotiations are confidential by law.

PUBLIC SERVANTS

As public servants, each board member is committed to conducting him or herself in a way that signifies their position as a public servant by working ethically to fulfill the school's mission, following all laws and regulations regarding the school, and by managing the school's funds in a responsible manner. It is expected that all board members will exhibit a professional demeanor at all board meetings. Issues being discussed will not be personalized nor directed toward any other board member, staff member, parent or anyone else.

MANAGEMENT OF PUBLIC FUNDS

The board is fully aware of the enormous responsibility involved with managing public funds. Therefore, the board is committed to adhering to sound budgeting principles, receiving and reviewing regular financial reports, reviewing the school's budget at least twice a year, adhering to applicable purchasing and procurement guidelines/rules, and conducting a thorough third-party financial audit each year to ensure proper management of public funds. While all board members have experience with managing budgets, The Board Treasurer possesses a unique combination of financial experiences that will assist the board with its fiscal responsibilities and decisions. The board Treasurer will ensure attendance at future financial trainings to increase the board and administration's understanding of the proper management of public funds.

LEGAL COMPLIANCE

The board will ensure that the school operates within the bounds of applicable laws, rules, and regulations, and that the school meets all other applicable obligations. The board recognizes the wide range of applicable legal obligations that govern a public charter school. These legal obligations include public education law, public meetings law, government records law, employment law, corporate/non-profit law, special education law, and contract law to name a few. Each member of the board possesses unique experience and expertise that will ensure the school is operating in legal compliance.

COMMITTEES

The Board of Trustees we'll establish committees as necessary to more effectively and efficiently fulfill its responsibilities. It is likely that as the school proceeds to the development process, the following committees will be formed:

Facilities Committee

The facilities committee will work to identify needs and implement a plan for the financing and construction of the school facilities and maintenance of the school. The committee will report any recommended actions, costs, and associated timelines to the board for review, approval, and action. The school director or business manager will likely chair this committee. The board will appoint the facilities committee, two of whom will be board members.

Accountability Committee

The accountability committee will meet all of the statutory requirements and will work to provide academic oversight to the school. Duties of the committee shall include:

1. Making recommendations to the director and board regarding the prioritization of expenditures of school monies
2. Reporting to students, parents, and the board of education on the educational performance of the school and providing dates for the appraisal of such performance
3. Making recommendations to the Director and business manager and board on the expenditure of school grants

LEGAL STATUS

IPA is a Utah nonprofit corporation and will apply for 501(c)(3) status from the IRS.

BOARD COMMITMENT TO ONGOING PROFESSIONAL DEVELOPMENT

IPA's board recognizes the importance of ongoing professional development; therefore, the board is committed to continually work to improve its knowledge, skills, and understanding of effective board governance, intends to take advantage of the numerous professional development options, such as the Board of Trustees Online Training modules, the Utah Best Practices Guidance Handbook, and board development literature.

SECTION 7
STAFFING

IPA's Staffing Needs and Plan

Based on our target student population of 530, the pedagogical indications for quality instruction, the following table summarizes the staffing needs at IPA and is reflected in the budget submitted under Section 8. IPA has a 1:25 teacher/student ratio in grades 1-6 and a 1:20 teacher/student ratio in kindergarten. However, both kindergarten teachers and each first grade teacher has one part-time paraprofessional. Each grade level team in grades 2-6 share one part-time paraprofessional.

Position	Grades Taught	Quantity	Position	Grades Taught	Quantity
Executive Director	n/a	1	Special education teacher	K-6	1
Curriculum director	n/a	1	Paraprofessional	SpEd K 1 2-6	1 2 3 6
Computer teacher/IT specialist	n/a	1	Art Teacher	1-6	1
Head Secretary Assistant Secretary	n/a	1 1	Music Teacher	1-6	1
Custodian	n/a	1	Kindergarten teacher	k	2 (4 half day classes)
Business Manager	n/a	1	Class grade teachers	1-6	18 (3 per grade level)
Special Education Director	n/a	1	Physical Education	1-6	1

At- Will Employment

IPA is an at-will employer. The school will not sign employment contracts for any length of time for any employee. All HR policies, forms, manuals, and procedures will protect the school's at will employment status. All personnel will be hired in compliance with all Federal and State rules and regulations. IPA's Executive Director will terminate employees only when it is in the best interest of the students and the mission of the school. The Board of Trustees will terminate

the Executive Director or Business Manager only when it is in the best interest of the students and the mission of the school.

Equal Opportunity Employer

IPA will follow all applicable state and federal employment laws, Americans with Disabilities Act (ADA), etc. IPA will not discriminate in any employment practices against a qualified individual with a disability nor discriminate against an applicant or employee based on race, color, national origin, religion, and/or gender. As necessary, IPA's Executive Director will seek counsel and assistance from qualified legal and human resources professionals concerning employment issues in order to ensure that the school conducts itself in accordance with the law. IPA will create an employee handbook containing the school's employment policies and procedures that will be updated as necessary and will be distributed to all employees.

Background Checks

All of the staff, including paraprofessionals, instructional aides, classroom aides, substitute teachers, parent volunteers, Board of Trustees and community members who will spend any significant unsupervised time with students will submit to and pass a criminal background check prior to beginning service with the school as required by UCA § 53A-1a- 512.5. The Director will ensure that all background checks are complete and maintained in the school's employee files. Background checks will be renewed every three years.

Educator Credentials

All teachers must maintain their license and other credentials appropriate to their position. IPA seeks to support and engage quality teachers and staff, but retains the right to terminate employment with or without cause and to determine whether cause for termination or discipline exists. Teachers will be employed for an indefinite period and in an at-will capacity. This means that both the school and the teacher retain the right to end the relationship at any time, with or without notice, and for any reason or no reason at all. IPA will not employ an educator whose license has been suspended or revoked by the Utah State Board of Education.

RECRUITMENT OF TEACHERS

IPA will use a variety of strategies to attract teachers that are a good fit, including, but not limited to:

- Posting positions through online boards at colleges that provide Waldorf teacher training, such as Antioch University and Rudolf Steiner College
- Posting on Waldorf based job boards: Waldorf Today, etc.
- Hosting informational meetings for students in teacher certification programs at nearby colleges.
- Participating in job fairs throughout the state as well as electronic job fairs

- Posting positions and regular updates on IPA's development through social media and electronic job boards such as teachers-teachers, Utah Department of Workforce Services' Jobs List, Craig's List, etc.

Hiring Practices

The Executive Director has the sole responsibility of hiring and firing all staff members. The Board of Trustees is not involved unless by the request of the Executive Director. The Executive Director approves all job descriptions for posting and will post all job openings internally and externally, establish criteria for screening applications, determine which applicants to interview, and will use proven and legally appropriate interview techniques to determine which candidates are the best match. Available positions will also be highlighted in regular email to the parent community and in school newsletters. Often the job descriptions will include an opening and closing date of at least 30 days and sometimes up to 90 or more. However, positions will occasionally be listed as "open until filled."

The Board of Trustees has the sole responsibility of hiring/firing the Executive director and Business Manager.

Evaluation and Interviews of Job Candidates

The Executive Director screens cover letters and applications for applicants of highest qualifications. The Curriculum Director, as well as, grade level team members may be invited to attend candidate interviews. The objective of the interview is to assess the candidates on the following 3 criteria:

1. Understanding of the mission of the school and the desire to promote it

1. Educational qualifications

2. Experiential history of similar methodologies

Teacher Qualifications:

- At least a bachelor's degree at an approved higher education institution. Master's preferred

- Hold a current level 1 or 2 elementary Utah teaching license or be on track to complete an alternative licensure within 3 years of hiring

- Have a firm understanding of how to teach the Utah Core through project based learning and/or direct instruction methods, and/or multisensory and arts integrated pedagogy

- Have experience in the administration, interpretation and development of formative and summative assessments

Responsibilities:

- Plan and implement core lesson plans showing fidelity to Waldorf methodology and CCSS
- identify individual student needs, conduct student studies, and address student concerns
- Develop, in accordance with IPA's guidelines and policy, reasonable rules of classroom behavior and appropriate techniques that are consistently applied
- Create a classroom environment conducive to learning by employing a variety of appropriate teaching techniques and methods, including direct instruction, arts integration, movement integration, cooperative learning, and hands-on activities.
- Use reflection, innovation, and creativity when designing instruction. Ensure that activities and instruction are tied to relevant and meaningful outcomes. Promote the ability of students to articulate what they are learning and why at any point in the learning process.
- Accommodate students with IEPs as required.
- Recognize learning problems and make referrals as appropriate.
- Evaluate accomplishments of students on a regular basis using multiple assessment
- Keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents formally periodically during the year, and provide progress and interim reports as required or as requested
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.
- Attend and participate in all Charter professional development days and activities.
- Keep educators' license and endorsements up-to-date and applicable to assignments.
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, assemblies, field trips, and other responsibilities as assigned.

Job Offers

All offers of employment will be contingent on reference checks and background checks. If selected for employment the process for completing new-hire paperwork and documentation, including any required background checks, will be handled by the school's business office.

IPA will use the following strategies to ensure teacher excellence:

1. Ongoing professional development as outlined under Program of Instruction

2. Employee compensation
3. Faculty participation
4. Regular, established evaluations

SCHOOL MANAGEMENT ROLES AND RESPONSIBILITIES

Executive Director

- Evaluate instructional program effectiveness
- Develop and enforce policies and procedures
- Supervise teachers and aides, regularly observe classes and groups, and coordinate the development of training programs in methods, content, and structure
- Work with other administration (including members of the Board of Trustees) on the purchase, distribution, and evaluation of curriculum materials and financial reporting
- Work with other administration and the Business Manager to coordinate state and federal reports of fiscal data
- Manage the instructional professional development program
- Document operations of charter programs to develop accurate budgets, procurement and spending
- Work with Business Manager to maintain fiscal control; Report accurate fiscal information
- Ensure school facilities are managed effectively.
- Provide for uniform enforcement of school standards and oversee appropriate and reasonable student discipline as issued in accordance with school policy
- Hold and attend parent/teacher/student conferences in regards to student and school issues
- Interview, select, and orient all new employees
- Provide training, tools, and all necessary information for each staff member to successfully perform their job functions
- Oversee and assess the performance of all school employees
- Hold employee evaluation conferences based on records of performance observations
- Promote a positive, nurturing school environment
- Evaluate the effectiveness of outside service providers

- Ensure effective, research-based professional development is provided and implemented
- Abide by all state and federal laws that apply to charter schools and charter policy
- Ensure compliance of budget guidelines and work with Business Manager to maintain fiscal control.
- Ensure school-wide compliance with all policies and procedures.
- Attend other meetings and training that provide legal guidance
- Participate in the school's annual fiscal audit and oversee the preparation of the school's Annual Budget, Annual Financial and Annual Program Reports
- Oversee Special Education department

STAFF ROLES AND RESPONSIBILITIES

Curriculum Director

- Work with the Executive Director to ensure the quality of instruction at IPA
- Mentor teachers on the implementation of Waldorf methods, the Utah Core, and lesson planning
- Mentor teachers on classroom management
- Facilitate training and development opportunities for teachers
- Meet weekly with teachers in team settings
- Mentor and work with specialty teachers in Waldorf methodology
- Disaggregate and analyze student data to present to faculty, administration, etc.
- Oversee school wide assessments DIBELS, SAGE, etc.
- Fulfill duties as assigned by Executive Director
- Special Education Director
- Oversee program management and compliance
- Assist in the creation and outfitting of facilities for students with disabilities
- Continually supervise curriculum program to ensure it is pertinent to student's needs
- Administer guidance in composing and implementing outside service contracts for special education students

- Direct the fiscal aspects of the special education department with the Business Manager and confirm that programs are cost effective and funds are managed within budgets

- Perform all state and federal special education reporting at year end and periodically and as required during the school year

- Coordinate and lead the school's state and federal audits of special education reporting and data

- Enter special education data accurately into the school's Student Information System to ensure accuracy in reporting and appropriate and adequate funding is received • Ensure that adequate supplies and equipment are available

- Evaluate special education program quality through assessment findings, including student achievement data

- Stay abreast of and abide by state and charter regulations and policies for charter schools

- Confirm that policies established by federal and state law, and the charter policy in area of Special education are being met

- Gather, manage and file all hardcopy and computerized reports, records, and other documents required by charter, state and federal regulations Evaluation and Reporting Meet with parents as requested to discuss needs and progress of students.

- School Secretary

- Prepare data for school, state, and federal enrollment reports

- Organize and manage hardcopy and electronic school and student files

- Act as school registrar for student information and records

- Draft correspondence, forms, reports, etc. as requested by the School Director and other administrative staff

- Oversee school calendar, scheduling, and appointments for administrative staff and Disperse and manage paperwork for newly enrolled students

- Assist, manage and access information for various school and government required reports

- Complete regular updates of the SIS system

- Record and track attendance as required for school and state reports

- Maintain and ensure the confidentiality of records and information regarding students, parents, and staff in accordance with accepted professional ethics, state and federal laws
- Answer incoming calls, take accurate messages, and transfer to appropriate staff
- Coordinate substitutes
- Assist with the daily arrival and departure of students
- Greet and assist students, parents and the general public
- Paraprofessionals
- Work with students and teachers as assigned
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, assemblies, field trips, and other responsibilities as assigned.
- Identify student needs and differentiate instruction to meet those needs
- Fulfill assignments as requested by teacher or administration
- Attend professional development, trainings, and meetings as requested
- Specialty Teachers
- Plan and implement core lesson plans showing fidelity to Waldorf methodology and CCSS
- identify individual student needs, conduct student studies, and address student concerns
- Develop, in accordance with IPA's guidelines and policy, reasonable rules of classroom behavior and appropriate techniques that are consistently applied
- Collaborate with teachers
- Fulfill assignments as requested by teacher or administration
- Attend professional development, trainings, and meetings as requested
- Keep educators' license and endorsements up-to-date and applicable to assignments.

SECTION 8
BUSINESS PLAN

IPA's Board of Trustees recognizes the need to make sound financial decisions a daily practice of the school in order to accomplish our mission. In addition, IPA's budget priorities and decision making are aligned to our mission. For example, we have prioritized the hiring of skilled staff, including a Curriculum Director, training and professional development for incoming teachers, and the acquisition of curriculum materials in the first years as these are essential components for success in meeting IPA's mission. The area of scope for financial decision-making includes, but is not limited to, facilities, maintenance and operations, staffing and benefits, curriculum, materials, technology, and purchased services. The Board of Trustees holds the school's Executive Director accountable for administering the budget. As yearly budgets and projections are prepared, IPA will ensure the funds are tied to fulfilling IPA's vision and mission and that the vision and mission remain operationally feasible. Below is a description of activities for appropriate accounting of costs for the planning year, the first and second operational years, and the contingency budget if enrollment only reaches 75%

After the second operational year, IPA projects a net asset balance of $617, 003. This will provide the resources necessary to respond to support new priorities for the developing school or to address unanticipated needs should they arise.

We anticipate that the school will reach full enrollment of 530 in its first year of operation. Three years of operating budgets have been included in Appendix B of this application, the balance for year three is projected at roughly $743,222. An overview of cash flow projections for the first three years is as follows:

Ivy Preparatory Academy's Cash Flow Overview: Years 1 – 3

	Balance	**Cumulative**
Year 1	$207, 540	$80, 040
Year 2	$409, 463	$617, 003
Year 3	$333, 759	$743, 222

PLANNING YEAR

The school's lease agreement will include the initial furnishings, fixtures, and equipment (FF&E), so the school's operating budget will be spared most expenses during the start-up period. For the final year before opening, IPA will seek a $300,000 loan through the Charter School Start-up Loan program. These funds would be used as follows:

Personnel: $82,500 ($75,000 for salaries, $7,500 for benefits)

These funds will be used to pay the principal/director and an assistant. Primary activities:

1) Recruitment and selection of teachers; 2) marketing, community outreach, student recruitment and registration; 3) site readiness; 4) oversee implementation of

technology infrastructure; and 5) negotiate contracts, subject to board approval, for instructional

2) Service providers to complement school employees (e.g., speech and language specialist, school psychologist).

Marketing: $45,000

As outlined in the Market Analysis section, these funds will be used to enhance the school's web site, print materials, and other marketing activities.

Balance: $172,500

This will provide a small cushion as we launch our first year.

OPERATIONAL YEARS 1-2

By July 2016, we anticipate that nearly all of the staff will have been hired and that the school facility will be full of activity preparing for the opening of this new school. A number of open houses will be held to help students and their families develop a sense of belonging and ownership in the new school. Teachers will participate in a variety of planning, training and professional development activities. The school's administrative team will continue the process of registering students and gathering student records.

Key aspects of the budget for the first two years of operations are provided below:

School Lunch: IPA will not have a school lunch program. We will address the needs of students who may qualify for free and reduced lunch on an individual basis.

Fund Balance: IPA's operating budget projects a fund balance of $80,000 at the end of its first year, and a cumulative balance of $617,003 at the end of its second year. This will provide important flexibility to enable the school to address unanticipated needs as they arise, or to proactively address new priorities for the developing school.

Teacher Salaries: Teachers will be paid average of the typical charter schools, allowing the school to hire teachers with experience, but having the fiscal ability to recruit the most promising younger teachers. Average teachers' salaries are projected at $40,000 in year one, but don't increase until year three.

Professional and Technical Services: IPA will primarily rely on internal professional development services seeking outside professional development and consultation when deemed necessary and cost-effective. We have budgeted a total of $80,000 for the first two of years of operation which will increase to $84,000 thereafter for contracting Special Education service providers, business management assistance such as Charter Solutions, Red Apple, etc.

Administrators: In year one, there will be a principal/director and a curriculum director 125000?

Facility Operations: IPA will be responsible for regular maintenance and cleaning of the school. IPA will employ on site custodian with $35,000 for services, and $40,000 for supplies and equipment

Building Lease: For year one, projected lease payments are roughly $50,000 per month.

School Buses: IPA does not plan to provide transportation to and from the school; however, students at all grade levels will have opportunities to participate in field trips. The school will likely contract for bus transportation services initially.

Program Records: All records will be:

- retained for three years after the close of the fiscal year in which funds were expended
- until any pending audits have been completed
- until all findings and recommendations arising from audits or issues have been completely resolved

Federal Program Funding: IPA will follow all fiscal and federal policies and procedures regarding any federal programming i.e. Title I, Title VII, according to Administrative Rule R277 and Rule R277 113. LEA Fiscal Policies and Accountability given by State of Utah.

Charter Start-up Loan Repayment: The operating budgets for the first six years will include $50,000 in payments toward the anticipated start-up loan of $300,000.

CONTINGENCY BUDGET

Alternative budgets based on breakeven enrollment targets have been provided side-by-side with the regular budgets in Attachment B. By adjusting staffing and salary levels, along with making proportional adjustments for per pupil expenses categories (e.g., instructional supplies), IPA can function successfully at lower enrollment levels. Teacher contracts will include a provision for salary adjustments based on enrollment levels (providing added incentive for good performance). With these adjustments, the projected fund balance at the end of year one with breakeven of the enrollment target will be $16,046. IPA will operate in a fiscally conservative and prudent manner so that the school has the resources it needs to support school improvement efforts on a continual basis.

Measure	Metric	Board Goal
Current ratio	Current Assets ÷	> 1.25
Debt ratio	Total Liabilities ÷	< 22 percent
Occupancy costs	Facility Costs ÷	< 22 percent

Maintain applicable bond covenants	No Default Certification, Audited Financial Statements	No default. School upholds all contractual obligations.
Current assets to total annual operating	[Current Assets ÷ (Total Annual Operating Expenses ÷	> 60 days cash on hand
expenses Adherence to Budget	(Budgeted expenditure - Expenditure) / Budgeted expenditure	Overall budget to actual expenditures within 5 percent of budget

FISCAL PROCEDURES

The governing board is ultimately responsible for the financial health of the school. The Board exercises its responsibility by:

1. Hiring the chief executive officer/director to manage school's financial operations and to comply with the school's board-adopted financial policies and procedures guidelines.
2. Designating a board treasurer (see Bylaws job description excerpt at the end of this section) to work closely with the principal/director and business management personnel, acting as a bridge between the Board and management, to ensure that the Board fully understands the organization's financial status.
3. Developing and approving the school's annual budget, including regular review and adjustments as required.
4. Reviewing regular financial status reports, including profit and loss, budget vs. actual, cash flow, balance sheet and accounts payable.
5. Reviewing and approving the annual financial audit report.
6. Participating in board professional development training with emphasis on financial management and oversight.

As per IPA's organizational plan, the Board of Trustees is expected to hire additional personnel to execute the business plan and oversee the business operation. The business manager may be a person hired by Board of Trustees, or a contracted service provider may perform the business management functions. The business manager must be experienced and have a track record of successful charter school financial management (see the business manager and treasurer description at the end of this section).

The business manager will work closely with the principal/director. Together, they are charged with executing and managing the financial operation of the school. The business manager, in concert with the principal/director, will work closely with the Board of Trustees, particularly the board treasurer, in the development of the annual budget, reporting and oversight of the school's finances and business operation.

The Board of Trustees will adopt a comprehensive policy for its fiscal operation, The *IPA Financial Policy and Procedures Guide,* to which guidelines the principal/director and school's business management personnel will comply. Key policies of interest to reviewers follow.

Standards – the school will utilize uniform budgeting, accounting, and auditing procedures and forms approved by the State Board of Education, which must be in accordance with generally accepted accounting principles (GAAP) and governmental auditing standards (GAAS) and Title 63J, Chapter 1, Utah Budgetary Procedures Act.

Budget – IPA's principal/director and business manager have primary responsibility for preparing an annual operating budget of revenues and expenses and a cash flow projection. Budgets are reviewed by the board treasurer and presented to the Board of Trustees at an open and public meeting. They are reviewed regularly and modified, as necessary. IPA will comply with the budgeting rules for local school boards as outlined in 53A-19-102.

Budget Reports – On a regular basis, at least monthly through the end of the first operational year, the principal/director and business manager are responsible for preparing financial status reports for the board treasurer and the full Board of Trustees, including profit and loss, budget vs. actual, cash flow, balance sheet, and accounts payable. Upon request, a monthly (quarterly after the first operational year) financial statement will also be provided to the staff of the Utah State Charter School Board. Business management staff will maintain complete and open records for any person who requests the information, in compliance with Utah State Laws and federal regulations governing the request of public records**.**

Segregation of Duties & Signature Authority – Because of our small size, it is especially important to be conscious of the separation of duties to prevent fraud or the appearance of fraud, especially in areas concerning cash, revenue receipts and check signing. At least one of the board president and treasurer, and the principal/director shall have signatory authority and are responsible for authorizing cash transactions. Signature authority may be granted to others as directed by the Board. All checks must have two signatures. The person who has prepared the check may not sign the check. Appropriate documentation must accompany expenditures.

Independent Auditor – As per its policies and state law, IPA will engage a qualified independent auditing firm to conduct an annual audit of its financial operation and prepare financial statements and annual financial reports required by the Utah State Office of Education and the Utah State Auditor. IPA will also engage an audit firm to confirm its October student census count and the year-end student date upload.

PURCHASING POLICIES AND PROCEDURES (PP&P)

IPA's purchasing guidelines exist to ensure that goods and services are acquired at fair and reasonable prices and that the highest personal standards of conduct are maintained in all relationships with vendors, suppliers, and subcontractors. IPA adheres to the following procurement objectives:

1. Procurements will be completely impartial based strictly on the merits of supplier and contractor proposals and applicable related considerations such as delivery, quantity, etc.
2. Make all purchases in the best interests of the school and its funding sources.
3. Obtain quality supplies/services needed for delivery at the time and place required.
4. Buy from responsible and dependable sources of supply.
5. Obtain maximum value for all expenditures.
6. Deal fairly and impartially with all vendors.
7. Be above suspicion of unethical behavior at all times; avoid any conflict of interest, related parties or even the appearance of a conflict of interest in IPA's supplier relationships.

In short, the school utilizes the following procurement guidelines:

a. Contracts under $1,000 – The school uses the purchasing objectives noted above when procuring goods and services for amounts less than $1,000.
b. Contracts from $1,000 to $50,000 – The school seeks price quotes from at least two vendors (three quotes are preferred) and awards the contract to the responsible vendor offering the supply or service needed for the best price, appropriate quality and in the necessary timeframe.
c. Contracts greater than $50,000 – The school conducts a formal advertised competition using sealed bids or proposals. An award is offered to the qualified bidder who meets the School's specifications and offers the best price.
d. Construction contracts – The school follows all state and federal guidelines inclusive of state public bidding laws.

8. Expendable Revenue and Undistributed Reserved – IPA's management and Board of Trustees will work to set standards on its annual operating safety margins. During the annual budget review, any plans to use expendable revenue and/or undistributed reserves must be in fulfillment of the school's mission, values and spending priorities, and receive Board approval in an open meeting. IPA will comply with the rules associated with school budget undistributed reserves in 53A-19-103.
9. Investments and Banking – The school will invest its funds in a fiscally prudent manner. The following priorities shall be followed: safety of principal, cash flow, liquidity, and yield. The school shall allocate interest earnings or losses, as they are realized, not less than annually. Reports, no less than quarterly, shall be provided to the Board of Trustees by the business management staff indicating fund balances, interest earnings to date and a forecast for the remainder of the fiscal year. IPA bank accounts will be placed in reputable and stable financial institutions and be FDIC insured. Utah Money Management Council reports will be sent in accurately and timely. The school will comply with Rule R628-2, "Investment of Funds of Public Education Foundations

Established under Section 53A-4-205 or Funds Acquired by Gift, Devise or Bequest," commonly called, the Money Management Act.

10. Fundraising and Donations – All revenue producing activities at IPA, including fundraising projects, must be board approved and support the school vision and educational philosophy. Proposals for fundraising projects should answer the following questions:
    a. For what purpose do we need additional funds?
    b. How much revenue do we intend to generate?
    c. How does this fundraiser align with our school's mission statement and educational beliefs?
    d. What are the responsibilities attached to receiving additional funds?

IPA welcomes donations from private sources. Accepted funds must be consistent with the mission and philosophy of the school and promote the education, health, or safety of students.

USOE SCHOOL FINANCE TRAINING

School Finance and Statistics Trainings – Appropriate school personnel, including the principal/director and business manager, will attend USOE School Finance & Statistics trainings regarding the minimum school program, financial reporting requirements and legislative changes of import to charter schools and districts. The principal/director (and the business manager where necessary) will attend all USOE charter school section monthly meetings. The business manager also will complete the required annual finance training each spring. IPA, in its efforts to ensure that all fiscal matters are handled responsibly and ethically, understands the need for ongoing training especially with regards to handling public funds.

BUSINESS ADMINISTRATOR

Business Manager Position Description

Business manager reports to the chair of the Board of Trustees and supports the CEO.

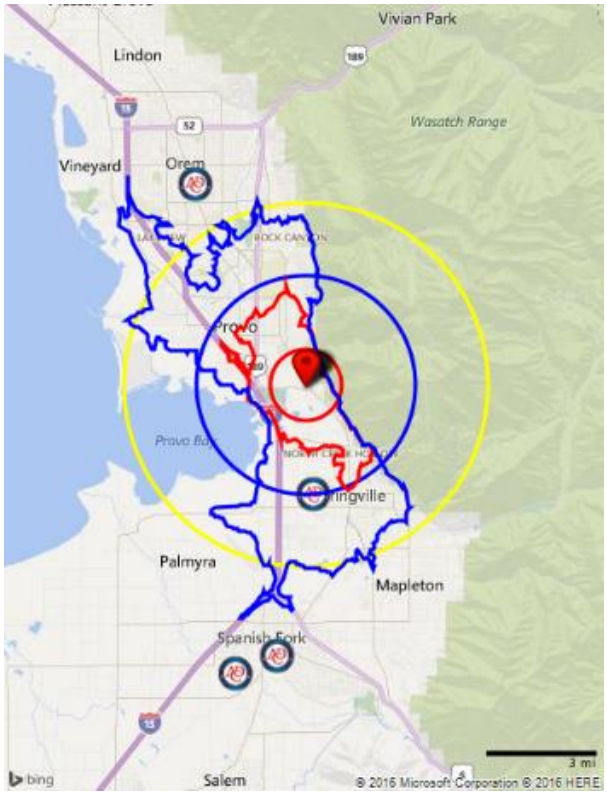
Specific responsibilities:

- Provides direction for the financial management of the school and facilitates board financial oversight.
- Provides direction for the oversight of the school's record keeping and accounting.
- Ensures the presentation of timely and meaningful financial reports to the Board.
- Leads the monitoring of budget implementation.
- Ensures the development of the annual budget and its submission to the Board for its approval in cooperation with the board treasurer.
- Oversees development and board review of financial policies and procedures.
- Ensures the presentation of the recommendations of the auditor to the Board for their approval.

- Leads in reviewing the results of the audit including the management letter, develops a plan for remediation, if necessary, and presents the results to the Board.
- Takes responsibility for designing an annual board education program so that all board members can effectively conduct oversight of the financial health of the organization.

PREFERRED SCHOOL SITE

Acknowledging that land acquisition can be challenging, IPA's Board of Trustees has consulted various developers over the past months. Although we have found options including buildings to retro-fit and land in various parts of the state, our focus is on 1860 east State Street in Provo. The site is ideal for our purpose as it is located close to Micro Focus (formerly Novell) and various businesses, enabling IPA to draw students from the surrounding areas, as well as, provide a more desirable commute for many working families seeking a charter school option.



Facility Plan Budget Total (Approximation)	Provo Site
Total acquisition cost	$1,100,000.
Total construction after contingency	$ 5,512,000
Total professional fees	$289, 380.
Total project financing fess/costs	$165,360.
Facility plan budget total	$7166,740.
Facility yearly lease rate	$645, 006.60

FACILITY

Meeting the Needs of a Waldorf Methods School

IPA consulted a charter school developer to determine the charter school space needs. The quick calculation for the gross square feet determined the school would best fit in a space

between 27,000 and 54,000 square feet. The Facility Committee also determined a more detailed look at the space needs and determined the school would optimally use 20 classrooms, ten offices/small rooms, a gym with a stage, a teacher work room/copy room, music room, computer lab, faculty break room, a lobby space, and an art room with plumbing for safety and clean up stations. An extra 30% of the subtotal new square foot space is allocated for hallways, bathrooms, and closets. The exterior of the school has parking needs and outdoor play space. The parking lot will need to serve approximately 60 spaces for staff (36), visitors (20), and handicapped (4) stalls. The parking lot will comply with ADA rules and regulations, and include a layout to accommodate drop-off and pick up of students. The other external areas needed are a Playground with play structures, a small garden and greenhouse.

The lower grades will need more space than the upper grades so that the students can have the traditional Waldorf moveable classroom design. Conceived in Scandinavia and developed in Germany, nearly one-third of the 222 Waldorf schools in Germany use this design. The moveable classroom, known as the Bochumer Model, utilizes low benches that can be moved and utilized in a multitude of ways: a circle, horseshoe, long lunch table, a balance beam, or an obstacle course. The moveable classroom encourages greater movement in the classroom which is believed to help create an academic setting that is developmentally conducive to learning in a way that is dynamic, interesting, and fun (see http://www.pinehill.org/movableclassroom).

Before IPA is approved and to facilitate accuracy of the facility process, IPA will continue to consult with an experienced realtor, architects, structural engineer, and financial advisers to ensure a timely delivery of the construction project and to keep facility costs in alignment with our budget.

LEASE OR BUILD TIMELINE

On or Before December 2016:

Consistent with UCA § 53A-1a-507(9) IPA will submit facility proposals to the state before entering a facility contract on or before January 1, 2017.

Prior to any purchase of land, contract to lease, construction or remodel, IPA's Facility Committee will with work with a Contractor/Builder/Architect to:

- Analyze current utilities access to the site (power, sewer, water and phone as well as fiber-optic cable for mandatory state online testing). Begin work with utility providers to ensure timely access for the school.
- Conduct a traffic study/analysis with necessary follow-up coordination with impacted government entities to ensure sufficient road access/construction timelines.
- Ensure completed purchase or lease contract of property (contract between builder and landowner).
- Ensure local municipality or city has reviewed and approved the project within their limits of authorization.

- Complete construction design plans and incorporate into a final design. The following plan reviews need to be completed prior to construction:
- Complete plan review by certified plans examiner;
- Structural Peer review of plans;
- Energy Code Review and State Fire Marshal review of plans.
- Complete final architectural designs with spec book finalization.
- Complete USOE and State Charter Board authorization forms to begin construction.
- Ensure Builder has completed construction financing—ensure this is documented and school is provided verification.
- Begin excavation of site (if applicable).

Consistent with UCA § 53 A-1a-507(9), IPA will submit any lease, lease-purchase agreement or other contract or agreement relating to the charter school's facility or financing the charter school facilities to its chartering entity for review and advice prior to the charter school entering into the lease, agreement, or contract. Consistent with R277-470- 7(C), IPA will enter into a facility contract on or before January 1, 2017 and construction or renovation will start immediately after the agreement is signed. Consisting with R277-471, the Facility Committee will submit SP-5 the School Construction Inspection Specialist.

The Facility Committee will also identify a Building Officer to monitor construction/remodel weekly, submit formal SP-8 reports to the State monthly starting at the beginning of construction/remodeling. In order to qualify as a Building Officer an individual must:

- Building Officer must be an employee of IPA, or member of the Charter Council—independent of all possible conflicts with Builders, Financiers or others;
- Building Officer should personally complete SP-4, SP-5, SP-8's, SP-9, SP-10 and SP-11;
- Building Officer should be recipient of the regular inspection reports and should monitor construction progress will all parties;
- Begin researching playground equipment and other exterior elements (bike-racks, benches, playground floor material, etc.);
- Create and submit contingency plan to State in case of delayed facility completion; and
- Ensure necessary classroom, kitchen (break room), and playground equipment have been ordered.

February to July 2017:

During the time the school is under construction, IPA Facility Committee will submit monthly reports to the State Charter School Board. The Facility Committee is will complete the Construction Checklist and manage the design and renovation work to ensure that the building will serve students with disabilities.

IPA's Building Officer/Contractor will:

- Ensure relevant government entities have school zone signage completed, or on track to be completed by date of occupancy;
- Ensure landscape will be completed this month (8 weeks prior to occupancy);
- Finalize installation of security system, phone system, internet and intercom/PA; and
- Obtain identified space within the building to begin housing necessary classroom materials and begin delivery (desks, chairs, etc.).

August 2017:

IPA's Building Officer/Contractor will:

- Obtain Occupancy Permit for the building—ideally no later than 8/1.

Begin the following:

- Student Testing & Assessment
- Teacher room prep
- Assembly and distribution of desks, chairs, filing cabinets, shelves, etc. **End of August 2017**: School in Session

SECTION 9
EDUCATION SERVICE PROVIDER

IPA has discussed services available from Educational Service Providers (ESP) and interviewed various ESP's. Presently, IPA does not intend to contract with an ESP. However, IPA reserves the right to contract should the Board of Trustees determine that an ESP will provide better expertise and alignment with the school's mission. Among the activities that may be contracted are: Special Education management services, Assessment Coordination, and Finance and Regulatory Compliance.

WORKS CITED

Babineaux, R. (1999). Evaluation report: Thomas E. Matthews Community School

Baratz-Snowden, J., & Darling-Hammond, L. (2005). *A good teacher in every classroom: Preparing the highly qualified teachers our children deserve*. San Francisco, CA: Jossey-Bass.

Catterall, J. (2004), Ten Year Study Shows Music Improves Test Scores.

http://center.serve.org/nche/downloads/briefs/reauthorization.pdf

Creghan, C. (2013). The effects of Project-Based Learning on economically disadvantaged students: A multi-year study. LAMAR UNIVERSITY-BEAUMON

Darling-Hammond, L. (2008). *The flat world and education: How America's commitment to equity will determine our future*. New York, NY: Teachers College Press.

Darling-Hammond, L., & Baratz-Snowden, J. (2007). A good teacher in every classroom: Preparing the highly qualified teachers our children deserve. *Educational Horizons, 85*(2), 111132.

Gardner, H. (2006). *The development and education of the mind: The selected works of Howard Gardner*. London: Routledge.

Goral, M. (2009). *Transformational teaching: Waldorf inspired methods in public school*. Great Barrington, MA: Steiner Books.

Great Schools, (2015). Mariposa California Standards Test. Retrieved from

http://www.greatschools.org

Kotulak, R. (1996, June). Learning how to use the brain. Brain Development In Young Children: New Frontiers for Research, Policy and Practice" Conference, Chicago, on June (Vol. 13, p. 1996)

Larrison, A. L., Daly, A. J., & VanVooren, C. (2012). Twenty years and counting: A look at Waldorf in the public sector using online sources. *Current Issues in Education, 15*(3), 1-23.

Marzano, R. J. (2004). Building background knowledge for academic achievement: Research on what works in schools. Ascd.

Miller, E., & Almon, J. (2009). Crisis in the Kindergarten: Why Children Need to Play in School. Alliance for Childhood (NJ3a).

Oberman, I. (2010, January). *Assessment and Waldorf Public Charter Schools*. Presented at the Alliance for Public Waldorf Education Annual Conference.

Oberman, I. (2008). Waldorf education and its spread into the public sector: Research findings. *Encounter, 21*(2), 10-14.

Oppenheimer, T. (1999). Schooling the imagination. *Atlantic, 284*(3), 71-81.

Project Foundry. (2015). *Why project based learning?* Retrieved from http://projectfoundry.org/project-based-learning-explained/why-project-based-learning.html

Rawson, M., & Richter, T. (2005). The educational tasks and content of the Steiner Waldorf curriculum. Forest Row, Sussex; Steiner Waldorf schools fellowship.

Schreiner, C. and Schwantner, U. (2009). *Section 9.6 comparison of skills and individual characteristics of Waldorf students*. PISA 2006: Austrian Report with a Focus on the Sciences

Steiner, R. (1995). The Fifth Gospel: From the Akashic Record: Thirteen Lectures Givn in Oslo,

Berlin and Cologne between 1 October 1913 and 10 February 1914. James Carrey Publishers.

Steiner, R. (1996). Rudolf Steiner in the Waldorf School: Lectures and Addresses to Children, Parents, and Teachers, 1919-1924 (Vol. 6). Steiner Books.

Sylwester, R. (1998). Art for the brain's sake. *Educational Leadership, 56*(3), 31-35.

Thomas, J. W. (2000). A review of research on project-based learning.

Ullrich, H. (1994). Rudolf Steiner. *Prospects: the Quarterly Review of Comparative Education*, *24*(3-4), 555–572. doi:10.1007/BF02195288

Walker, A., & Leary, H. (2009). A problem based learning meta-analysis: Differences across problem types, implementation types, disciplines, and assessment levels. Interdisciplinary Journal of Problem-based Learning, 3(1), 6

APPENDIX A: LIST OF ADMINISTRATIVE RULES AND THEIR TITLES FROM WHICH THE CHARTER SCHOOL REQUESTS TO BE WAIVED.

IPA is not requesting waivers

APPENDIX B ARTICLES OF INCORPORATION

JBB

RECEIVED
SEP 29 2015
Utah Div. of Corp. & Comm. Code

SEP 29 '15 PM3:47

ARTICLES OF INCORPORATION
OF
Ivy Preparatory Academy

I

The name of this corporation is Ivy Preparatory Academy.

II

A. This organization is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the Nonprofit Public Benefit Corporation Law for charitable purposes.
B. The Specific purposes for which this corporation is organized include, but are not limited to: assisting in educational pursuits of young people through charter schools, scholarships, teacher enhancement, etc.

III

The name and address in the State of Utah of this Corporation's initial agent for service of process is:

Name: Dena Lundgreen

Address
615 East 5900 South Principal office

Murray, UT 84107

The name and address in the State of Utah of this Corporation's incorporator for service of process is:

Name: Dena Lundgreen

Dena Lundgreen

Address
615 East 5900 South
Murray, UT 84107

IV

A. The corporation is organized and operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code.
B. Notwithstanding any other provision of these Articles, the corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income tax under Section 501 (c)(3) of the Internal Revenue Code or (2) by a corporation contributions to which are deductible under Section 170(c)(2) of said Code, or the corresponding provisions of any future statute of the United States.
C. No substantial part of the activities of this corporation shall consist of carrying on propaganda or otherwise attempting to influence legislation; nor shall the corporation participate or intervene in any political campaign (including the publishing or distribution of statements) on behalf of any candidate for public office.

Date: 09/29/2015
Receipt Number: 6167653
Amount Paid: $30.00

V

The names and addresses and office held of the persons designated to act as the initial Board of

Directors of this corporation are: Dena Lundgreen, 615 East 5900 South, Murray, UT 84107; William Brown, 700 east 4576 South, SLC, UT 84321, Tom Nied, 700 East 4576 South, SLC, UT 84321

VI

A. The property of this Corporation is irrevocably dedicated to charitable purposes and no part of the net income or assets of the corporation shall ever inure to the benefit of any director, trustee, member or officer of this corporation, or to any private person. The Corporation does not issue stock to any of its voting members.
B. Upon the dissolution or winding up of the corporation, any assets remaining after payment of, or provision for payment of, all debts and liabilities shall be distributed to a governmental entity described in Section 170(b)(1) (A)(v) of the Internal Revenue Code, or to a nonprofit fund, foundation, or corporation which is organized and operated exclusively for charitable purposes, which has established its tax exempt status under Section 501(c)(3) of the Internal Revenue Code, and which is qualified to receive "qualified conservation contributions" within the meaning of Section 170(h) of said Code, or the corresponding provisions of any future statute of the United States.
C. In the event of a liquidation of this corporation, all corporate assets shall be disposed of in such a manner as may be directed by decree of the superior court for the county in which the corporation has its principal office, on petition therefore by the Attorney General of by any person concerned in the dissolution, in a proceeding to which the Attorney General is a party.

IN WITNESS WHEREOF, the undersigned, being the President of the Board of Directors of Ivy Hall Charter School and the initial directors named in these Articles of Incorporation on September 28, 2015.

President of the Board of Directors

William Brown, President

DECLARATION

We are the persons whose names are subscribed below. We collectively are all of the Board of Directors of Ivy Hall Charter School and all of the initial directors named in the Articles of Incorporation, and we have executed these Articles of Incorporation. The foregoing Articles of Incorporation are out act and deed, joint and severally.

Executed on September 22, 2015

at 700 East 4657 South, SLC, UT 84321

I declare that the foregoing is true and correct.

William Brown, President

APPENDIX C: IVY PREPARATORY ACADEMY CHARTER SCHOOL BYLAWS

ARTICLE I: NAME AND PURPOSE

Section A. Name. The name of the corporation is the Ivy Preparatory Academy (hereinafter "the Corporation").

Section B. Purpose. The purposes of the Corporation shall be:

1. to act and operate exclusively as a nonprofit corporation pursuant to the laws of the State of Utah, and to act and operate as an educational institution in a manner to be determined by the Board of Trustees and included here;

2. to engage in any and all activities and pursuits, and to support or assist such other organizations, as may be reasonably related to the foregoing and following purposes;

3. to provide programs, instruction and materials to encourage, support and facilitate student learning and development;

4. to engage in any and all other lawful purposes, activities and pursuits, which are substantially similar to the foregoing and which are or may hereafter be authorized by Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and the regulations promulgated thereunder (the "Code") and are consistent with those powers described in the Act; and

5. to solicit and receive contributions, purchase, own and sell real and personal property, to make contacts, to invest corporate funds, to spend corporate funds for corporate purposes, and to engage in any activity in furtherance of, incidental to, or connected with any of the other purposes.

ARTICLE II: MEMBERSHIP

The Corporation has no members. The rights, which would otherwise vest in the members vest in the directors of the Corporation (hereinafter the "directors", the Board" or "members"). Actions require approval by a simple majority of all members.

ARTICLE III: BOARD OF TRUSTEES

Section A. Powers. The Board shall conduct or direct the affairs of the Corporation and exercise its powers, subject to applicable education law, not-for-profit corporation law, the Corporation's charter and these Bylaws. The Board may delegate the management of the activities of the Corporation to others, so long as the affairs of the Corporation are managed, and its powers are exercised, under the Board's ultimate jurisdiction. Without limiting the generality of the powers hereby granted to the Board, but subject to the same limitations, the Board shall have all the powers enumerated in these Bylaws, and the following specific powers:

1. to elect and remove directors;

2. to select and remove officers, committee members, service providers and the executive director of the school; to prescribe powers and duties for them; and to fix their compensation;

3. to conduct, manage and control the affairs and activities of the Corporation, and to make rules and regulations;

4. to enter into contracts, leases and other agreements which are, in the Board's judgment, necessary or desirable in obtaining the purposes of promoting the interests of the Corporation;

5. to carry on the business of operating the charter school and apply any surplus that results from the business activity to any activity in which the Corporation may engage;

6. to act as trustee under any trust incidental to the Corporation's purposes, and to receive, hold, administer, exchange and expend funds and property subject to such a trust;

7. to acquire real or personal property, by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of such property;

8. to borrow money, incur debt, and to execute and deliver promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations and other evidences of debt and securities;

9. to lend money received only from private sources and to accept conditional or unconditional promissory notes therefore, whether interest or non-interest bearing, or secured or unsecured; and

10. to indemnify and maintain insurance on behalf of any of its trustees, officers, employees or agents for liability asserted against or incurred by such person in such capacity or arising out of such person's status as such, subject to the provisions of the Utah Not-for-Profit Corporation Law and the limitations noted in these Bylaws.

Section B. Number of Trustees. The number of trustees of the Corporation shall be not fewer than five. The Board shall fix the exact number of directors, within these limits, by board resolution or amendment of the Bylaws.

Section C. Appointment of Trustees.

1. Appointment. The initial Board members shall be those individuals identified as such in the charter application prepared for submission to the Utah State Office of Education on or before September 30, 2015.

2. Eligibility. The Board may elect any person who in its discretion it believes will serve the interests of the Corporation faithfully and effectively and so long as the prospective board member meets all applicable regulations of the Utah State Office of Education.

3. Term of Office. The regular term for board membership shall be three years; however, initial board members shall be assigned to one-, two-, or three-year terms so that roughly one third of the Board shall be up for reelection in any given year.

4. Term Limits. Board membership shall not be automatically term limited, but shall be subject to vote of the Board Members who are not up for reelection.

5. Time of Elections. The Board shall appoint directors whose term begins on July 1st of a given year at the annual meeting for that year, or at a regular meeting designated for that purpose, or at a special meeting called for that purpose to fill a mid-year vacancy.

6. Related Members. If any two members of the board are related, each member shall be counted fully in constituting a quorum; however, in regard to voting, if both members are in attendance each shall have one-half vote. If only one of the related members is present, he or she shall have a full vote.

Section D. Removal of Director. The Board may remove a director in accordance with the applicable provisions of the education law and the non-profit law, with such removal requiring a sixty percent vote of an assembled quorum of the Board.

Section E. Resignation by Director. A director may resign by giving written notice to the board president or secretary. The resignation is effective upon receipt of such notice, or at any later date specified in the notice. The acceptance of a resignation by the board president or secretary shall not be necessary.

Section F. Vacancies. A vacancy is deemed to occur on the effective date of the resignation of a director, upon the removal of a director, upon declaration of vacancy pursuant to these Bylaws, or upon a director's death. A vacancy is also deemed to exist upon the increase by the Board of the authorized number of directors.

Section G. Compensation of Directors. Directors shall serve without compensation. However, the Board may approve reimbursement of a director's actual and necessary expenses while conducting corporation business in accord with the set budget and board imposed limits for such activities.

ARTICLE IV: PRINCIPAL OFFICE

The Corporation's principal office shall be at the following address: Provo or at such other place as the Board may select by resolution or amendment of the Bylaws. The secretary shall note any change in office on the copy of the Bylaws maintained by the secretary.

ARTICLE V: MEETINGS OF THE BOARD

Section A. Place of Meetings. Board meetings, annual meetings, or special meetings shall be held at the corporation's principal office or at any other reasonably convenient place as the Board may designate.

Section B. Adjournment. A majority of the directors present at a meeting, whether or not a quorum, may adjourn the meeting to another time and place.

Section C. Notices. Notices regarding meetings will follow Utah Open Meetings Law.

ARTICLE VI: ACTION BY THE BOARD

Section A. Quorum. Unless a greater proportion is required by law, a majority of the entire Board shall constitute a quorum for the transaction of any business or of any specified item of business

Section B. Action by the Board.

1. Actions Taken at Board Meetings. Except as otherwise provided by statute or by these Bylaws, the vote of a majority of the Board present at the time of the vote, if a quorum is present at such time, shall be the act of the Board. If at any meeting of the Board there shall be less than a quorum present, the directors present may adjourn the meeting until a quorum is obtained.

2. Board Participation by Other Means. In all events, a quorum of the board must be present to lawfully conduct a board meeting of the charter school. Directors may participate by means of video-conferencing or by virtue of other electronic means and may be counted toward achieving a quorum provided all directors participating in such meeting are able to hear one another and there is no objection from any director.

Section C. Committees.

1. The Board may choose to establish working committees consistent with relevant laws and regulations in the state of Utah, though these committees may not conduct official Board business.

Section D. Standard of Care.

1. Performance of Duties. Each director shall perform all duties in good faith and with that degree of diligence, care and skill, including reasonable inquiry, as an ordinary prudent person in a like position would use under similar circumstances.

2. Reliance on Others. In performing the duties of a director, a director shall be entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, presented or prepared by:

a. One or more officers or employees of the Corporation whom the director believes to be reliable and competent in the matters presented;

b. Legal counsel, public accountants or other persons as to matters that the director believes are within that person's professional or expert competence; or

c. A board committee on which the director does not serve, duly designated in accordance with a provision of the Corporation's charter or Bylaws, as to matters within its designated authority, provided the director believes the committee merits confidence and the director acts in good faith, with a standard of care (referenced in paragraph D.1), and after reasonable inquiry when the need is indicated by the circumstances, and without knowledge that would cause such reliance to be unwarranted.

3 Investments. In investing and dealing with all assets held by the Corporation for investment, the Board shall exercise the standard of care described above in paragraph D.1 and shall consider among other relevant considerations the long and short term needs of the Corporation in carrying out its purposes, including its present and anticipated financial requirements. The Board may delegate its investment powers to others, provided that those powers are exercised within the ultimate direction of the Board.

Section E. Rights of Inspection. Every director has the right to inspect and copy all books, records and documents of every kind and to inspect the physical properties of the Corporation, provided that such inspection is conducted at a reasonable time after reasonable notice, and provided that such right of inspection and copying is subject to the obligation to maintain the confidentiality of the reviewed information, in addition to any obligations imposed by any applicable federal, state or local law.

Section F. Participation in Discussions and Voting. Every director has the right to participate in the discussion and vote on all issues before the Board or any board committee, except that any director shall be excused from the discussion and vote on any matter involving such director relating to: (a) a self- dealing transaction; (b) a conflict of interest; (c) indemnification of that director uniquely; or (d) any other matter at the discretion of a majority of the Board present.

Section G. Duty to Maintain Board Confidences. Every director has a duty to maintain the confidentiality of all board actions, which are not required by law to be open to the public, including discussions and votes that take place at any executive sessions of the Board. Any director violating this confidence may be removed from the Board.

Section A. Officers.

ARTICLE VII: OFFICERS

1 Titles. The Officers of the Corporation are president, vice president, secretary, and treasurer. The Board of Trustees may create such other officer positions as it deems necessary. Each officer position shall specify and include its duties and responsibilities in these Bylaws. No officer may hold more than one position at the same time.

2. Election. For all positions other than secretary, the officers shall be elected from among the Board of Trustees at each annual meeting of the directors and shall serve for one year and until their successors are elected and qualified. The Board may elect an individual to serve as secretary who is not a member of the board.

3. Terms. The president may serve no more than three consecutive one-year terms. Directors elected to the other officer positions may serve no more than five consecutive one-year terms. Former officers, after a break in service of one year, may be elected to another term as an officer.

4. Duties. Officers shall have the duties and responsibilities belonging to their office, including those that follow.

(a The president shall be the chief executive officer of the Corporation, responsible, along with his/her fellow directors, for the oversight of its business and affairs. He/she shall preside at all meetings of the Board. The president shall have full and equal vote as accorded to all members. The president may enter into and execute in the name of the Corporation contracts or other instruments that are authorized by the Board of Trustees. The president may delegate, as needed, to any other officer any or all of the duties of the office of president. He/she shall have such other powers and duties as may be prescribed by the Board or by these Bylaws.

(b The vice president shall have such duties and responsibilities as may be delegated to him/her by the president. The vice president shall have full and equal vote as accorded to all members. In the absence of the president, the vice president shall perform all the duties of the president and, when so acting, shall have all the responsibilities of and be subject to all the restrictions as fall upon the president, including presiding at meetings of the Board of Trustees. He/she shall have such other powers and duties as may be prescribed by the Board of Trustees or by these Bylaws.

(c The secretary shall cause notices of all meetings to be served to all members of the Board of Trustees and the director and shall keep or cause to be kept the minutes of all meetings of the Board, including the time and place, the names of those present, the actions taken, and the votes on such actions. The secretary shall present the minutes of the previous meeting at the subsequent meeting to be voted on by the Board and duly noted in the minutes of the instant meeting. The secretary shall keep the seal of the Corporation. He/she shall have such other powers and duties as may be prescribed by the Board or by these Bylaws.

(d The treasurer shall be the chief financial officer of the Corporation and shall have oversight of the business administrator or business service provider as that employee or service takes responsibility of the financial records, investments, and other evidences of school properties and assets. The treasurer shall ensure that the business administrator or business service provider keeps regular books of account for the Corporation that set out business transactions of the Corporation, such books to be at all times open to inspection at their place of keeping to any board member. The treasurer shall be the chair of the financial

committee, which shall prepare an annual budget, in conjunction with the school director and the school business administrator, for the consideration and approval of the Board. The treasurer shall ensure that the business administrator deposits all moneys and other valuables in the name and to the credit of the Corporation with such depositories as shall be designated by the Board. The treasurer shall provide oversight to the business administrator or business service provider in the investment and reinvestment of funds of the Corporation and the disbursement of funds of the Corporation as may be ordered by the Board. The treasurer shall render to the Board and the members of the school community, at the annual meeting, statements evidencing the current financial condition of the Corporation. The treasurer shall ensure that the business administrator or business service provider establishes a system of adequate financial recording showing quarterly income, expenditures, and balance and shall, at the first meeting following the end of each quarter, submit to the Board a detailed written financial report in compliance with the Utah statutes and regulations relating to charter schools. The treasurer, as chair of the finance committee, annually shall recommend an auditing firm to be hired by the Board to review the books of the Corporation and provide a report on them to the Board.

Section B. Election, Eligibility and Term of Office.

1. Election. The Board shall elect the officers annually at the annual meeting or a regular meeting designated for that purpose or at a special meeting called for that purpose, except that officers appointed to fill vacancies shall be elected as vacancies occur.

2. Eligibility. A director may hold any number of offices, except that neither the secretary nor treasurer may serve concurrently as the chairman.

3. Term of Office. Each officer serves at the pleasure of the Board, holding office until resignation, removal or disqualification from service, or until his or her successor is elected.

Section C. Removal and Resignation. The Board may remove any officer, either with or without cause, at any time. Such removal shall not prejudice the officer's rights, if any, under an employment contract.

Any officer may resign at any time by giving written notice to the Corporation, the resignation taking effect upon receipt of the notice or at a later date specified in the notice.

ARTICLE VIII: NON-LIABILITY OF DIRECTORS

The directors shall not be personally liable for the Corporation's debts, liabilities or other obligations.

ARTICLE IX: INDEMNIFICATION OF CORPORATE AGENTS

The Corporation shall, to the fullest extent now or hereafter permitted by and in accordance with standards and procedures provided by law and any amendments thereto, indemnify any person made, or threatened to be made, a party to any action or proceeding by reason of the

fact that he, his testate or intestate was a director, officer, employee or agent of the Corporation, against judgments, fines, amounts paid in settlement and reasonable expenses, including attorneys' fees. Furthermore, the Corporation shall maintain liability insurance to protect each director and officer of the Corporation for any issues that arise in relation to their service to the Corporation.

ARTICLE X: SELF-DEALING TRANSACTIONS

The Corporation shall not engage in any self-dealing transactions, except as approved by the Board. "Self- dealing transaction" means a transaction to which the Corporation is a party and in which one or more of the directors has a material financial interest ("interested director(s)"). Notwithstanding this definition, the following transaction is not a self-dealing transaction, and is subject to the Board's general standard of care:

A transaction which is part of a public or charitable program of the Corporation, if the transaction (a) is approved or authorized by the Board in good faith and without unjustified favoritism; and (b) results in a benefit to one or more directors or their families because they are in a class of persons intended to be benefited by the program.

ARTICLE XI: OTHER PROVISIONS

Section A. Fiscal Year. The fiscal year of the Corporation begins July 1 of each year and ends June 30.

Section B. Execution of Instruments. Except as otherwise provided in these Bylaws, the Board may adopt a resolution authorizing any officer or agent of the Corporation to enter into any contract or execute and deliver any instrument in the name of or on behalf of the Corporation. Such authority may be general or confined to specific instances. Unless so authorized, no officer, agent or employee shall have any power to bind the Corporation by any contract or engagement, to pledge the Corporation's credit, or to render it liable monetarily for any purpose or any amount.

Section C. Checks and Notes. Except as otherwise specifically provided by Board resolution, checks, drafts, promissory notes, orders for the payment of money, and other evidence of indebtedness of the Corporation may be signed by the president of the Board and executive director. Such items for amounts of $5,000.00 or greater must be signed by these individuals.

Section D. Construction and Definitions. Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in law and shall govern the construction of these Bylaws. Without limiting the generality of the foregoing, words in these Bylaws shall be read as the masculine or feminine gender, and as the singular or plural, as the context requires, and the word "person" includes both a corporation and a natural person. The captions and headings in these Bylaws are for reference and convenience only and are not intended to limit or define the scope or effect of any provisions.

Section E. Conflict of Interest. Any director, officer, or committee member having an interest in a contract, other transaction or program presented to or discussed by the Board or board committee for authorization, approval, or ratification shall make a prompt, full and frank disclosure of his or her interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include all relevant and material facts known to such person about the contract or transaction that may reasonably be construed to be averse to the Corporation's interest. The body to which such disclosure is made shall thereupon determine, by majority vote, whether the disclosure shows that a conflict of interest exists or can reasonably be construed to exist. If a conflict is deemed to exist, such person shall not vote on, nor use his or her personal influence on, nor be present during the discussion or deliberations with respect to, such contract or transaction (other than to present factual information or to respond to questions prior to the discussion). The minutes of the meeting shall reflect proceedings, including the disclosure made, the vote therein and, where applicable, the abstention from voting and participation. The Board may adopt formal policies requiring:

1. Regular annual statements from directors, officers and key employees to disclose existing and potential conflicts of interest; and

2. Corrective and disciplinary actions with respect to transgressions of such policies. For the purpose of this section, a person shall be deemed to have an "interest" in a contract or other transaction if he or she is the party (or one of the parties) contracting or dealing with the Corporation, or is a director or officer of, or has a significant financial or influential interest in the entity contracting or dealing with the Corporation.

APPENDIX D: MINUTES FROM BOARD OF TRUSTEES MEETINGS

Ivy Preparatory Academy Board of Directors Organizational Meeting Minutes Tuesday

September 22, 2015

7:00 – 8:00 p.m.

4547 South 700 East Suite 205 Salt Lake City, UT 84107

In Attendance: Bill Brown, Dena Lundgreen, Tom Nied, Lyndsay Huntsman, Gayla Gallacher, Shawn Potter, Chris Allen.

I. Bill Brown, agreed to serve as Chair to conduct the organizational meeting. Dena Lundgreen served as the Secretary. Bill called the meeting to order.

II. Introductions were made around the table and room.

III. Discussion on the Adoption of the Bylaws:

a. Remuneration was discussed and it was determined that the board would donate services.

b. Participation at meetings via teleconferencing is an option.

c. Bylaws Approved: Bill Brown moved to approve and adopt the Corporate Bylaws, with the amendment for liability insurance to be provided. Dena Lundgreen seconded the motion - with unanimous approval of the board members.

IV. Finalized list of initial board members: Bill Brown, Chris Allen, Dena Lundgreen, Tom Nied, Lyndsay Huntsman, Gayla Gallacher, Shawn Potter

V. IPA charter application

a. Anticipated roles were discussed along with potential technology to be purchased, potential grants, and alternative funding sources.

b. Charter Application Approved for Submittal: Dena Lundgreen motioned to approve charter application, and Bill Brown seconded the motion. The board unanimously approved in favor.

VI. A discussion on the roles of board members transpired. Election of Board officers:

a. Nominations & election of President – Bill Brown

b. Nominations & election of Vice President – Chris Allen

c. Nominations & election of Treasurer – Gayla Gallacher

d. Nominations & election of Secretary – Dena Lundgreen

e. Corporate Officers Elected: Bill Brown made a motion to approve these positions, and Dena Lundgreen seconded the motion, which was unanimously approved by all seven board members.

VII. Adjourned at 8:00 pm

APPENDIX E EXECUTED CONTRACTS

Presently, IPA does not intend to contract with an ESP. However, IPA reserves the right to contract should the Board of Trustees determine that an ESP will provide better expertise and alignment with IPA's mission. Among the services that may be contracted are: Janitorial Services, Assessment Coordination, Finance and Regulatory Compliance, Special Education coordinator.

ATTACHMENT A: FOUNDING BOARD BACKGROUND INFORMATION

Name: WILLIAM H. BROWN **Role with school: Board President**

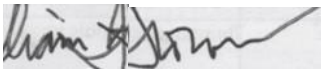
Expertise: Corporate Management, Nonprofit Board Chairman, Public School Program Advisory Board Member

Statement of Intent: I am passionate about improving the outcomes for the students in our educational environments. The combination of expertly delivered common core curriculum combined with application of STEM education policy and curriculum and a focus on project based learning can significantly impact student development. I desire to not only improve student performance based upon standard methods but also add sill sets including critical thinking and creative enlightenment to further enhance the learning and development process. In addition to the passion, I bring business and leadership skills to assemble and lead a team of subject matter expert that will be able to deliver a high quality and sustainable program.

Not-for-Profit History: Building upon my experience as a franchise owner of a supplemental learning business (Huntington Learning Center, Hartford CT) I have been heavily engaged in pro bono and formal engagement in educational initiatives at all levels. I have served and been chairman of a nonprofit organization supporting entrepreneurism in Utah (Entrepreneur Launch Pad), Served as mentor in educational competition programs (Utah Entrepreneur Challenge at the University of Utah, DECA competition at the LOS Business College and other programs and venues. Additionally, I currently serve as a pro bono member of the Advisory Board for the Park City Center for Advanced Professional Studies (PCCAPS).

Employment History: Addressed in previous sections of this document, I have experience in the development of small businesses, management of an education business, an entrepreneur, a business development consultant and mentor and small business owner. Experience in financial and business management comes also from positions at large corporations including Medtronic, Inc., where I held various positions in senior and operational management with my last position being Director of Emerging Solutions in a medical device division (I left that position to build a team that eventually acquired two businesses from Medtronic).

Education History: My formal education included BSEE program at Newark College of Engineering (1974) and BBA program at the City University of New York (1975). This was wrapped around two years of military service which constituted an irreplaceable education (Vietnam Era Veteran). During my career I have taken numerous classes in business, leadership, entrepreneurism, quality management and critical thinking, all to follow my path to learning/doing which I typically phrase as "Knowledge, Understanding and Applying".
WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERI FY ANY INFORMATION PROVIDED ABOVE FOR the Ivy Preparatory Academy CHARTER SCHOOL.



Name: CHRISTON C. ALLEN **Role with school: Board Vice President**

Expertise: Establishing Waldorf based schools

Statement of Intent: I will serve as Board Vice President for Ivy Preparatory Academy. I have been involved with Waldorf education for close to 25 years. This involvement began with the founding of Arizona Council for Waldorf Education which is an organization that fosters the development of Waldorf inspired schools in Arizona. We currently have seven operating schools in Arizona. One of these, Desert Marigold School is a K-12 charter school which will celebrate its twenty-first birthday this coming year. I have served as a board member for DMS which is located in the Phoenix, Arizona area where I maintain a residence. Both my wife and daughter are experienced Waldorf teachers whom I have encouraged for a number of years. I have maintained a business office in Utah and for the last several years have been involved in meetings and presentations involving Waldorf education, primarily in Utah County where I have presented "Why Waldorf Works" as a well-attended lecture. I have also assisted with education conferences where I have made introductions for Waldorf/charter school professionals from other geographical areas.
It has been a dream of mine for many years to see Waldorf education, particularly the charter school version, made available to our children. I believe very strongly in the curriculum and principles represented by Waldorf. I believe the Ivy Prep group to have the abilities and motivation and resources to make Waldorf work in the Provo area of Utah County.

Not-for-Profit History: I have made a special study of non-profit funding programs for K-12 schools. I have consulted Arizona based Waldorf charter schools on an individual school basis and for many years as a founder and member of AC>NE (Arizona Council for Waldorf Education), which has assisted with the development of currently, seven schools. ACWE has been in existence for almost 25 years and we have two schools which were established 20 years ago. One of these, on which I have served as a school board member, is a K-12 Waldorf inspired charter school. I have also spent many years working with my religious organization and also the Boy Scouts of America in a variety of positions.

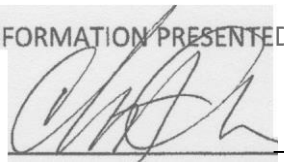
Employment History: I am currently employed as Vice President of Gains Corporation, which is the managing member of Gains Venture Group, LLC. We have funded a number of companies seeking to become publicly traded. The principals of this group have been involved together for many years in non-profit activities, specifically for members of the Hilton (hotel) family, one of which is my associate in Gains. Two of the other Gains associates were Phoenix, "Philanthropist" of the year. I have owned and operated a consulting firm, C.C. Allen and Associates, an Arizona proprietorship, for 25 years. We have helped scores of companies in becoming publicly traded and also in developing capitalization programs. I have a cum laude Bachelor of Science Business degree from Arizona State University, and also wrote a syndicated column "Franchise Facts" which appeared in small newspapers for a number of years.

Education History: I attended schools; elementary through College in Arizona. I began my college training in 1969 at Mesa Community College where I completed two years before entering the U.S. Navy in early 1972. During my years in the service, had special training in Oceanography and associated subjects and was able to work on the implementation of the Magnetic Anomaly Detection System initially developed by Gulf 011. This was part of my work as an anti-submarine warfare operator. I was a helicopter crewman (duties including search and rescue) and was in charge of Aircrew Training for enlisted service men until my honorable discharge in 1975.

I re-entered college in 1976 subsequently attending Arizona State University where I received a Bachelor of Science in Business Administration (cum laude and on the Dean's list six times). I spent two years in graduate school in English literature, also at A.S.U. was a professional lecturer for Discovery Resources, a New York based seminar company for three years, during which my 90-minute seminar was presented in New York, other U.S. cities, and also in Cancun, and Puerto Vallarta, Mexico.

I also served as an L.D.S. Institute teacher in Gilbert, Arizona.
WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERI FY ANY INFORMATION PROVIDED ABOVE FOR IVY PREPARATORY ACADEMY CHARTER SCHOOL.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Name: <u>GAYLA GALACHER</u> **Role with school: Treasurer**

Expertise: banking/finance

Statement of Intent: I will demonstrate my commitment to the school/community as I actively serve on the board of directors. I hope my experience in the finance and business lending industry will influence the success of the institution. I have a strong belief in the influence of education as a measure of success for the rising generation.
Not-for-Profit History: I have enjoyed being a Rotarian for the past 15 years. Not only has it given me the opportunity to help guide and direct the "Coats for Kids Car Show", it has also given me the great opportunity of working with children of all ages. Being of service to everyone, is the best feeling anyone can have. I have also worked as a volunteer teacher at the county detention center, working with boys from 8 to 18 in age. It was very important to me that I taught them how important education would be for them not only at the present time, but for their entire life

Employment History: I have been in the finance world for over 48 years. Present time: First National Bank of Layton: Business Development, Consumer/Commercial Lending. Key Bank Small Business Lending. West One Bank: Branch Manager. Zions First National Bank: Branch Manager, and Trainer

Education History: Graduated from South High School, 1967. Went to LDS Business College (2 years) Business Courses. Went to University of Utah (1year) Business Courses. Took several courses from Utah Bankers Association.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Ivy Preparatory Academy CHARTER SCHOOL.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Name: DENA LUNDGREEN **Role with school: Secretary**

Expertise: Education

Statement of Intent: I am committed to serving on the governing board of IPA and to building an excellent Waldorf- inspired child centered public charter school worthy of its community. I will use my expertise in teaching and learning to help guide curriculum and instruction decisions when appropriate. My experience with kinesthetic, arts integrated, project based learning, and whole-child education coupled with my knowledge of Waldorf education will give insight to the Board. I am dedicated to building a school culture that values the emotional, social, and intellectual wellbeing of every child and one that is respectful and collaborative within its staff. My training in Educational Leadership reinforces my dedication and competency to support IPA's administration. I am dedicated keeping IPA fiscally sound, academically strong, legally compliant, and a desirable educational choice for parents and students.

Not-for-Profit History: I served as an intern for the American Cancer Society where I promoted the organization and its programs within the community.

As a social worker for Early Head Start, I worked with low-income families and children with disabilities. My main responsibilities were conducting needs assessments, creating strategic plans of action, and connecting with other community and social service organizations to support the families within my caseload.

During my administrative internship, I worked closely with my mentor principals in creating and adhering to the school's budget, as well as, potential fund raising opportunities.

Employment History: I have been in the field of education for over 10 years. Six of those years were spent in charter schools while three were in private schools. I co-created a secondary ESL

program for Mount Vernon Academy and hosted several foreign exchange students in my home. As a teacher, I have created, served on, and collaborated with a variety of committees, worked closely with parents, kept and updated legal documents such as IEPs, and helped create emergency plans. As a social worker for Early Head Start, I built a variety of community partnerships. I was the Lead Content Designer for Waterford Research Institute, a local international curriculum company, where I designed content for a technology-based language arts program serving Title 1, ESL, and low performing students. I managed a small group of educators, computer programmers, and artists. I collaborated with the project manager concerning budget needs and allocation.

I am currently a k-3 literacy Specialist at Redwood Elementary where I coach and mentor teachers, as well as, create and give professional development

Education History: BS in psychology - Brigham Young University- graduated May 2004 MAEd- University of Phoenix -graduated June 2005 Principal Licensure Certificate - University of Phoenix- graduated June 2015 -UT Admin License to be granted October 2015

I am sufficiently qualified to help develop a Waldorf- methods charter school due to my knowledge of and experience in child/cognitive development, teaching experience in district, private, and charter schools, as well as my training and experience in educational leadership and administration.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Ivy Preparatory Academy CHARTER SCHOOL. I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BESTOF MY KNOWLEDGE.

Name: <u>SHAWN POTTER</u> **Role with School: Voting Member**

Expertise: Legal Counsel

Statement of Intent: I will serve as legal counsel. I understand my role is to provide the board and administration with legal advice in the setup and roll out of the school when requested as well as on specific issues that arise from time to time.

Not-for-Profit History: I previously served on the Salt Lake City Housing Authority Board, and currently represent the Community Development Corporation of Utah as its outside counsel. I have prepared and filed non-profit articles for numerous homeowner associations and provide guidance to their governing boards. I have also setup 501(c)(3) documents for a handful of clients over the years relating to youth leadership and sports.

Employment History: I have degrees in public policy and law. I have worked in government and as a private practice attorney. I started my legal career with a large litigation firm in Boise,

Idaho. I currently manage Wasatch Law Group in Park City, Utah, a much smaller law firm. As a practicing attorney I have represented an educational institution in connection with specific claims made by students as well as providing general counsel on specific requested areas such as employment issues, contracts, and the like. I have also been involved in litigation over construction claims related to school building projects.

Education History: Dixie College A.A. Political Science 1993 Brigham Young University B.A. & M.A. Public Policy 1996 University of Kansas School of Law J.D. 2001

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR IVY PREPARATORY ACADEMY CHARTER SCHOOL.

IAFFIRM THAT THE INFORMATION PRESENTED HEREIN *IS* TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Name: LYNDSAY HUNTSMAN **Role with School: voting member**

Expertise: Education

Statement of intent: I am dedicated to providing guidance, leadership, and insight for Ivy Prep as we establish a Waldorf methods charter school.

Non-profit History: Limited experience

Employment History: Director and principal of Park City Learning Center PCCAPS.

Assistant Principal

Aug. 2010 August 2015. Park City High School. Park City, Utah Aug.

2009-Aug. 2010 Park City High School. Park City. Utah instructed

students in the areas of Business. Finance and Marketing

Teacher

Aug. 2007- July 2009 \Morgan High School. Morgan. Utah. Instructed students in the areas of Business and Marketing

- Developed and supervised Future Business Leaders of America (FBLA) club Supervised the creation and design of the high school yearbook

Education History:

June 2010 June 2012 Southern Utah University Cedar City. Utah Masters of Education with an emphasis in Educational Leadership

- Graduated Summa Cum Laude

Jan 2005 May 2007 Weber State University Ogden. Utah

Bachelor of Science in Business Education Minor in Marketing Education and Multimedia

Graduated Cum Laude

Aug. 200 I · Dec. 2004 William Penn University Oskaloosa. 'Iowa

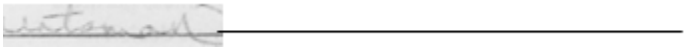
Bachelor of Arts in Sports Administration

- Minor in Business Management and Physical Education
- Graduated Cum Laude

Participated in intercollegiate soccer and softball

Member of the National Honor Society Alpha Chi

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR IVY PREPARATORY ACADEMY CHARTER SCHOOL.
IAFFIRM THAT THE INFORMATION PRESENTED HEREIN *IS* TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE



Name THOMAS NIED **Role with school Board Member**

Expertise Finance, organization, performance to goals, business strategy

Statement of Intent: My role on the board will be to ensure compliance to applicable laws, regulations, compliance and reporting requirements. Also, my role will be to ensure the mission of the school will be accomplished in the most effective legal, ethical and moral manner possible for students, parents, and school staff.

Not-for-Profit History: My personal history with not-for-profit organizations is comprised of leadership positions within the St. Louis, MO Boy Scouts of America (BSA) at the troop and district level. Also, I served as the president of our local community center, Chesterfield Bath and Tennis. My experience comprised of maintaining standards of conduct within the organizations, ensuring sound financial principles, and effective operating procedures.

Employment History: Adjunct professor at Westminster College, teaching Entrepreneurship at the graduate level

Impact Navigators, LLC -CEO, providing mentoring, advisory, and interim executive services for local Utah small businesses

Ligonier Management, LLC - CEO, providing, international coaching services to owners of small businesses in the US, Africa, and Europe
Kitco Defense, President responsible for profit/loss, regulatory compliance, and customer satisfaction
AAI Services, Inc. -Vice president - business development responsible for business strategy, new business growth, and member of company leadership team responsible for profit/loss, and customer satisfaction.
The Boeing Company/McDonnell Douglas -various management and leadership positions including business development, strategic planning, financial management, operations, and other technical functions.
In all the positions above, financial responsibilities included budgeting, reporting, trend analysis, internal/external reporting compliance, expenditure approvals, and audits.

Education History: Master of Business Administration, St. Louis University, Jan 83 - May 85
Bachelor of Science, Aeronautics, Parks College of St. Louis University, Sep 73 -Apr 77 WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERI FY ANY INFORMATION PROVIDED ABOVE FOR Ivy Preparatory Academy.

ESENTED HEREIN IS TRUE AND CORRECT TO THE BEST
I AFFIRM THAT THE INFORMATION PR
OF MY KNOWLEDGE.

9/29/75 _____

Applicant's Signature

ATTACHMENT B: BUDGET

Charter Name			Fiscal Year: FY17 (7/1/16 - 6/30/17)
Revenue			**Planning Year**
		Charter School Revolving Loan	$300,000
		Total Revenue from State Sources (3000)	
	Private Grants & Donations :		$0
		Source(s) *(specify)*	
	Loans:		
		Commercial	$0
		Other *(specify)*	$0
		Total Revenue from Other Sources (5000)	
		Total Revenue	**$0**

Expenditures		**Number**	**Salary/Cost**	**Total**
	--- SALARIES ---			
24.121	Salaries - Principals and Assistants	1.00	$50,000	$50,000
24.152	Salaries - Secretarial and Clerical	0.00	$0	$0
24.100	Salaries - Other School Administration	1.00	$25,000	$25,000
	Total - School Administration Salaries (100)			**$75,000**
26.182	Salaries - Operation & Maintenance of Facilities	0.00	$0	$0
	Total 2600 - Operation & Maintenance of Facilities Salaries (100)			**$0**
	TOTAL - ALL SALARIES (100)			**$75,000**
	--- BENEFITS ---			
24.210	Retirement - School Administration	0%	$75,000	$0
26.210	Retirement - Operation & Maintenance of Facilities	0%	$0	$0
	Total - All Retirement			**$0**
24.220	Social Security/FICA/Unemployment/Workers Comp - School Administration	10%	$75,000	$7,500
26.220	Social Security/FICA/Unemployment/Workers Comp - Operation & Maintenance of Facilities	10%	$0	$0
	Total - All Social Security/FICA/Unemployment/Workers Compensation			**$7,500**
24.240	Insurance (Health/Dental/Life) - School Administration	0%	$75,000	$0
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facilities	0%	$0	$0
	Total - All Insurance (Health/Dental/Life)			**$0**
24.290	Other Benefits *(specify)* - School Administration	0%	$75,000	$0
26.290	Other Benefits *(specify)* - Operation & Maintenance of Facilities	0%	$0	$0
	Total - All other benefits (*specify*)			**$0**
	TOTAL ALL BENEFITS (200)			**$7,500**
	--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---			
24.300	Purchased Professional & Technical Services - School Administration			
26.300	Purchased Professional & Technical Services - Operation & Maintenance of Facilities			$0

45.300	Purchased Professional & Technical Services - Building Acquisition & Construction Services			$0
	TOTAL - ALL PURCHASED PROFFESSIONAL & TECHNICAL SERVICES (300			**$0**
	--- PURCHASED PROPERTY SERVICES ---			
26.400	Purchased Property Services			$0
26.441	Rental of Land & Buildings			$0
26.450	Construction and Remodeling			$0
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			**$0**
	--- OTHER PURCHASED SERVICES ---			
24.520	Insurance(other than employee benefits - e.g. D&O)			$0
45.521	Property Insurance			$0
45.522	Liability Insurance			$0
24.530	Communication(telephone and other)			$0
26.530	Communication(telephone and other)			$15,000
24.540	Advertising			$25,000
24.550	Printing and Binding			$5,000
24.580	Travel/Per Diem			$0
26.580	Travel/Per Diem			$0
	TOTAL - OTHER PURCHASED SERVICES (500)			**$45,000**
	--- SUPPLIES ---			
10.600	Instructional Supplies			
10.641	Textbooks	0.00	$0	$0
21.600	Supplies - Student Support Services	0.00	$0	$0
22.600	Supplies - Instructional Staff Support Services	0.00	$0	$0
22.644	Library Books	0.00	$0	$0
22.650	Periodicals	0.00	$0	$0
22.660	Audio Visual Materials - Instructional Support Staff	0.00	$0	$0
24.600	Supplies - School Administration			$0
31.600	Supplies - Food Service			$0
31.630	Food - Food Service			$0
	TOTAL - ALL SUPPLIES (600)			**$0**

--- OTHER OBJECTS ---				
10.800	Other Objects- Instruction			$0
21.800	Other Objects- Student Support			$0
22.800	Other Objects- Instructional Staff			$0
24.800	Other Objects- School Administration			$0
26.800	Other Objects - Operation & Maintenance of Facilities			$0
31.800	Other Objects - Food Services			$0
10.800	Other Objects - Building Acquisition			$0
	Total - All Other Objects			**$0**
10.810	Dues and Fees - Instruction			$0
21.810	Dues and Fees - Student Support			$0
22.810	Dues and Fees - Instructional Staff			$0
24.810	Dues and Fees -School Administration			$0
26.810	Dues and Fees - Operation & Maintenance of Facilities			$0
	Total - All Dues and Fees			**$0**
TOTAL - OTHER OBJECTS (800)				**$0**
3000	Total State			$0
TOTAL REVENUES				
100	Salaries			$75,000
200	Employee Benefits			$7,500
300	Purchased Professional and Technical Services			$0
400	Purchased Property Services			$0
500	Other Purchased Services			$45,000
600	Supplies			$0
700	Property			$0
800	Other Objects			$0
TOTAL EXPENDITURES				

Excess or De	**ficiency of Revenues over Expenditures**			**-$127,500**
Other Source	**s of Funding (5000)**			**$0**
Net Asset Ba	**lance (Fund Balance)**			**-$127,500**
Reserves as	**Percentage of Total Revenue** (Net Assets / Total Revenue)			**#DIV/0!**
Percentage o	**f Funding Contributed to Reserve Balance** (Total Rev - Total Exp / Total Rev = >5%)			**#DIV/0!**

Notes:

The FY15 WPU value was used and indexed 3% per year.

$80, 000 budget for Purchased Professional & Technical Services (24.300)

Training budget is located at 21.580

The 24.300 account contains funds for a management company who provides their own accounting software. The school will also use Aspire SIS which is free from the state at the moment.

CHARTER SCHOOL WORKSHEET

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

Charter Name			
	Enrollment	**Rating Factor**	**WPU Generated**
Estimated enrollment (K)	25	0.55	13.75
Estimated enrollment (1-3)	200	0.9	180
Estimated enrollment (4-6)	175	0.9	157.5
Estimated enrollment (7-8)		0.99	0
Estimated enrollment (9-12)		1.2	0
Special Ed enrollment (K)			
Special Ed enrollment (1-12)	37.5		
Special Ed (Self-Contained)	3.75		
Number of Teachers (K-6)			
Number of Teachers (7-12)			
WPU Value	$2,972	*(Except for CTE Add-on and Special Ed.*	
No. of Teachers (FTE) (CACTUS)	0		
School Administrators (CACTUS)			

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	351.2500	$ 1,043,915
Professional Staff	0.059507	20.9018	62,120
Restricted Basic School:			
Special Ed--Add-on	1.0000	41.2500	112,448
Spec. Ed. Self-Contained	1.0000	3.7500	11,145
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	$261.97 per K-8 ADM		104,788

Total WPU Programs		417.1518	$ 1,334,416
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$28.30 per WPU		$ 11,805
Special Populations			
Enhancement for At-Risk Students	$26.38 per student		10,552
Enhancement for Accelerated Stude	$5.00 per student		2,000
Other			
School Land Trust Program	$49.35 per student		19,740
Reading Achievement Program	$15.81 per student-Guarantee Program		3,557
Charter Administrative Costs	$100 per student		40,000
Educator Salary Adjustment (ESA)	$5,215 per qualified educator plus benefits		-
ESA-School Administrators	$3,104 per qualified administrator		-
Library Books and Resources	$0.960162 per student	403.75	388
Local Replacement Dollars	Average $1,660 per student		670,225
Total Non-WPU			$ 758,267
One Time			
Teacher Materials/Supplies[1, 2]	$176.33 per eligible F.T.E.	0	-103
	Ivy Preparatory Acade	*y*	-
Total One Time			$ -
ESTIMATED Total All State Funding			**$ 2,092,683**
[1]			

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

CHARTER SCHOOL WORKSHEET

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

Charter Name			
	Enrollment	**Rating Factor**	**WPU Generated**
Estimated enrollment (K)	80	0.55	44
Estimated enrollment (1-3)	225	0.9	202.5
Estimated enrollment (4-6)	225	0.9	202.5
Estimated enrollment (7-8)		0.99	0
Estimated enrollment (9-12)		1.2	0
Special Ed enrollment (K)	8		
Special Ed enrollment (1-12)	53		
Special Ed (Self-Contained)	6.1		
Number of Teachers (K-6)	20		
Number of Teachers (7-12)			
WPU Value	$2,972	*(Except for CTE Add-on and Special Ed.*	
No. of Teachers (FTE) (CACTUS)	20		
School Administrators (CACTUS)			

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	449.0000	$ 1,334,428
Professional Staff	0.059507	26.7186	79,408
Restricted Basic School:			
Special Ed--Add-on	1.0000	63.5000	173,101
Spec. Ed. Self-Contained	1.0000	6.1000	18,129
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	$261.97 per K-8 ADM		138,844

Total WPU Programs		545.3186	$ 1,743,910
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$28.30 per WPU		$ 15,433
Special Populations			
Enhancement for At-Risk Students	$26.38 per student		13,981
Enhancement for Accelerated Stude	$5.00 per student		2,650
Other			
School Land Trust Program	$49.35 per student		26,156
Reading Achievement Program	$15.81 per student-Guarantee Program		4,822
Charter Administrative Costs	$100 per student		53,000
Educator Salary Adjustment (ESA)	$5,215 per qualified educator plus benefits		104,300
ESA-School Administrators	$3,104 per qualified administrator		-
Library Books and Resources	$0.960162 per student	536.1	515
Local Replacement Dollars	Average $1,660 per student		889,926
Total Non-WPU			$ 1,110,782
One Time			
Teacher Materials/Supplies[1, 2]	$176.33 per eligible F.T.E.	20	3,527104
	Ivy Preparatory Acade	y	-
Total One Time			$ 3,527
ESTIMATED Total All State Funding			**$ 2,858,219**
1			

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

Charter Name	FY18			FY18		
First Operational Year	**100% Enrollment**			**Breakeven Enrollment**		
Number of Students:		530			400	
Grade Configuration:	Grades			Grades		
Revenue						
Child Nutrition Program (CNP) and Lunchroom Sales		0	$0		0	$0
Student Activities	$168			$0		
Other	$0			$0		
Total Revenue From Local Sources (1000)	**$168**			**$0**		
Charter School Revolving Loan	$300,000			$300,000		
State Educational Funding	$2,858,219			$2,092,683		
Total Revenue from State Sources (3000)	**$2,858,219**			**$2,092,683**		
Lunch and Breakfast Reimbursement		0	$0		400	$162,720
Restricted Federal Through State	$0			$0		
Programs for the Disabled (IDEA)	$77,168			$58,240		
Elementary and Secondary Education Act (ESEA)	$71,995			$54,336		
Total Revenue from Federal Sources (4000)	**$149,163**			**$112,576**		
Private Grants & Donations:	$0			$0		
Source(s) *(specify)*	$0			$0		
Loans:				$0		
Commercial	$0			$0		
Other *(specify)*	$0			$0		
Prior Year Carryforward	-$127,500			-$127,500		
Total Revenue from Other Sources (5000)	**$0**			**$0**		
	Total Revenue	**$3,007,550**		**$2,205,259**		

Expenditures		Number	Salary/Cost	Total	Number	Salary/Cost	Total
		--- SALARIES ---					
10.131	Salaries - Teachers	21.00	$40,000	$840,000	16.00	$35,000	$560,000
10.132	Salaries - Substitute Teachers	0.50	$33,000	$16,500	0.50	$35,000	$17,500
10.161	Salaries - Teacher Aides and Paraprofessionals	10.00	$17,000	$170,000	5.00	$15,840	$79,200
10.100	Salaries - Other 1000-Instruction	0.00	$0	$0	0.00	$0	$0
	Total **10 (1000)-INSTRUCTION** Salaries (100)			**$1,026,500**			**$656,700**
21.141	Salaries - Attendance and Social Work Personnel	1.00	$25,000	$25,000	0.50	$25,000	$12,500

21.142	Salaries - Guidance Personnel	0.50	$35,000	$17,500	0.50	$35,000	$17,500
21.143	Salaries - Health Services Personnel	0.00	$35,000	$0	0.00	$35,000	$0
21.144	Salaries - Psychological Personnel	0.00	$35,000	$0	0.25	$35,000	$8,750
21.152	Salaries - Secretarial and Clerical	1.00	$25,000	$25,000	1.00	$25,000	$25,000
21.100	Salaries - Other 2100-Student Support	0.50	$35,000	$17,500		$0	$0
	Total - STUDENT SUPPORT Salaries (100)	3.00		**$85,000**			**$63,750**
22.145	Salaries - Media Personnel - Certified	0.00	$0	$0	0.00	$0	$0
22.162	Salaries - Media Personnel - Noncertified	0.00	$20,000	$0	0.25	$20,000	$5,000
22.100	Salaries - Other 2200-Instructional Staff Support	0.00	$20,000	$0	0.00	$0	$0
	Total - **INSTRUCTIONAL STAFF SUPPORT** Salaries (100)			**$0**			**$5,000**
24.121	Salaries - Principals and Assistants	1.00	$75,000	$75,000	1.00	$75,000	$75,000
24.152	Salaries - Secretarial and Clerical	0.00	$0	$0	1.00	$25,000	$25,000
24.100	Salaries - Other 2400-School Administration	1.00	$60,000	$60,000	1.00	$60,000	$60,000
	Total **-SCHOOL ADMINISTRATION** Salaries (100)			**$135,000**			**$160,000**
26.100	Salaries - Operation & Maintenance of Facilities	1.00	$35,000	$35,000	1.00	$25,000	$25,000
	Total **-OPERATION & MAINT OF FACILITIES** Salaries (100)			**$35,000**			**$25,000**
31.100	Salaries - Food Services	0.00	$20,000	$0	0.00	$20,000	$0
	Total **-FOOD SERVICES** Salaries (100)			**$0**			**$0**
	TOTAL - ALL SALARIES (100)			**$1,281,500**			**$910,450**
		--- BENEFITS ---					
10.210	Retirement - Instruction	4%	$1,026,500	$41,060	4%	$656,700	$26,268
21.210	Retirement - Student Support	4%	$85,000	$3,400	4%	$63,750	$2,550
22.210	Retirement - Instructional Staff Support	4%	$0	$0	4%	$5,000	$200
24.210	Retirement - School Administration	4%	$135,000	$5,400	4%	$160,000	$6,400
26.210	Retirement - Operation & Main of Facilities	4%	$35,000	$1,400	0%	$25,000	$0
31.210	Retirement - Food Services	0%	$0	$0	0%	$0	$0
	Total - All Retirement			**$51,260**			**$35,418**
10.220	Social Security/FICA/Unemployment/ Workers Comp - Instruction	10%	$1,026,500	$102,650	10%	$656,700	$65,670
21.220	Social Security/FICA/Unemployment/ Workers Comp - Student Suppo	10%	$85,000	$8,500	10%	$63,750	$6,375
24.220	Social Security/FICA/Unemployment/ Workers Comp -School Adminis	10%	$135,000	$13,500	10%	$160,000	$16,000
26.220	Social Security/FICA/Unemployment/ Workers Comp - Operation & M	10%	$35,000	$3,500	10%	$25,000	$2,500

31.220	Social Security/FICA/Unemployment/ Workers Comp - Food Services	10%	$0	$0	10%	$0	$0
	Total - Social Security/FICA/Unemployment /Workers Comp			**$128,150**			**$90,545**
10.240	Insurance (Health/Dental/Life) - Instruction	0%	$1,026,500	$126,000	0%	$656,700	$126,000
21.240	Insurance (Health/Dental/Life) - Student Support	0%	$85,000	$18,000	0%	$63,750	$0
24.240	Insurance (Health/Dental/Life) - School Administration	0%	$135,000	$12,000	0%	$160,000	$18,000
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Faciliti	0%	$35,000	$6,000	0%	$25,000	$0
31.240	Insurance (Health/Dental/Life) - Food Services	0%	$0	$0	0%	$0	$0
	Total- All Insurance(Health/Dental/Life)			**$162,000**			**$144,000**
10.200	Ivy Preparatory Other Benefits *(specify)* - Instruction	0%	$1,025,500	Ivy Academy 0	0%	$656,700	$0
21.200	Other Benefits *(specify)* - Student Support	0%	$85,000	$0	0%	$63,750	$0
24.200	Other Benefits *(specify)* - School Administration	0%	$135,000	$0	0%	$160,000	$0
26.200	Other Benefits *(specify)* - Operation & Maintenance of Facilities	0%	$35,000	$0	0%	$25,000	$0
31.200	Other Benefits *(specify)* - Food Services	0%	$0	$0	0%	$0	$0

Total - All Other Insurance **$0** **$0**

45.521	Property Insurance			$0			$0
45.522	Liability Insurance			$25,000			$25,000
10.530	Communication(telephone and other)			$5,000			$5,000
21.530	Communication(telephone and other)			$0			$0
24.530	Communication(telephone and other)			$0			$0
26.530	Communication(telephone and other)			$0			$0
24.540	Advertising			$10,000			$10,000
10.550	Printing and Binding			$1,200			$1,200
21.550	Printing and Binding			$5,000			$5,000
24.550	Printing and Binding			$0			$0
10.560	Tuition			$0			$0
21.570	Food Service Management			$0			$0
21.580	Travel/Per Diem			$5,000			$5,000
24.580	Travel/Per Diem			$0			$0
26.580	Travel/Per Diem			$0			$0
10.590	Inter-educational, Interagency Purchased Services			$0			$0
TOTAL - OTHER PURCHASED SERVICES (500)		**$56,200**					**$56,200**
--- SUPPLIES ---							
10.600	Instructional Supplies	20	$1,500	$50,000	14	$1,500	$21,000
10.641	Textbooks			$115,000			$115,000
21.600	Supplies - Student Support Services	20	$1,000	$20,000	14	$1,000	$14,000
22.644	Library Books	0	$0	$0	0	$0	$0
22.650	Periodicals	0	$0	$0	0	$0	$0
24.600	Supplies - School Administration	3	$1,000	$3,000	3	$1,000	$3,000
26.600	Supplies - Operation & Maintenance of Facilities	10	$1,000	$40,000	10	$1,000	$10,000
31.600	Supplies - Food Service	10	$1,000	$0	10	$1,000	$0
31.630	Food - Food Service			$0			$0
TOTAL - ALL SUPPLIES (600)				**$228,000**			**$163,000**
--- PROPERTY ---							
10.700	Property (Instructional Equipment) - Instruction			$25,000			$28,000

21.700	Property - Student Support Services			$5,000		$5,000
24.700	Property - School Administration			$5,000		$6,000
26.700	Property - Operation & Maintenance of Facilities			$5,000		$5,000
31.700	Property - Food Services			$0		$0
31.780	Depreciation - Kitchen Equipment Depreciation			$0		$0
49.710	Land and Improvements			$0		$0
49.720	Buildings			$0		$0
27.732	School Buses			$0		$0
10.733	Furniture and Fixtures - Instruction			$30,000		$20,000
24.733	Furniture and Fixtures - School Administration			$5,000		$5,000
21.733	Furniture and Fixtures - Student Support Services			$5,000		$5,000
10.734	Technology Equipment - Instruction			$40,000		$30,000
24.734	Technology Equipment - School Administration			$9,000		$9,000
21.734	Technology Equipment - Student Support Services			$2,000		$2,000
27.735	Non-Bus Vehicles			$0		$0
10.739	Other Equipment - Instruction			$0		$0
21.739	Other Equipment - Student Support Services			$0		$0
24.739	Other Equipment - School Administration			$0		$0
	TOTAL - ALL PROPERTY (700)			**$131,000**		**$115,000**
			--- OTHER OBJECTS ---			
10.800	Other Objects- Instruction			$0		$0
21.800	Other Objects- Student Support			$0		$0
24.800	Other Objects- School Administration			$1,000		$800
26.800	Other Objects - Operation & Maintenance of Facilities			$0		$0
31.800	Other Objects - Food Services			$0		$0
45.800	Other Objects - Building Acquisition			$0		$0
	Total - All Other Objects			$0		$0

10.810	Dues and Fees - Instruction			$0		$0
21.810	Dues and Fees - Student Support			$0		$0
24.810	Dues and Fees -School Administration			$900		$0
26.810	Dues and Fees - Operation & Maintenance of Facilities			$0		$0
	Total - All Dues and Fees			$0		$0
	TOTAL - OTHER OBJECTS (800)			**$1,900**		**$800**
	Total Building Acquisition & Instruction (4500)					
45.830	Int rest e			$0		$0
45.840	Re emption of Principal			$0		$0
	Total other financing sources (uses) and other items			**$0**		**$0**

1000	Total Local			$168		10$06
3000	Total State			$2,858,219		$2,092,683
4000	Total Federal			$149,163		$112,576
	TOTAL REVENUES		**$3,007,550**			**$2,205,259**
100	Salries			$1,281,500		$910,450
200	E oloyee Benefits m			$341,410		$269,963
300	chased Professional and Technical vices			$160,000		$130,000

300	Purchased Professional and Technical Services			$160,000			$130,000
400	Purchased Property Services			$600,000			$600,000
500	Other Purchased Services			$56,200			$0
600	Supplies			$228,000			$163,000
700	Property			$131,000			$115,000
800	Other Objects			$1,900			$800
	TOTAL EXPENDITURES			**$2,800,010**			**$2,189,213**
Excess or Deficiency of Revenues over Expenditures				**$207,540**			**$16,046**
Other Sources of Funding (5000)				**$0**			**$0**
Net Asset Balance (Fund Balance)				**$207,540**			**$16,046**
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)				**7%**			**1%**
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)				**0.06900629**			**1%**
Necessary Closure Fund (2 months Purch Prop Serv + Other)				**$100,317**			**$100,133**

Ivy Preparatory Academy

CHARTER SCHOOL WORKSHEET

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

Charter Name			
	Enrollment	**Rating Factor**	**WPU Generated**
Estimated enrollment (K)	80	0.55	44
Estimated enrollment (1-3)	225	0.9	202.5
Estimated enrollment (4-6)	225	0.9	202.5
Estimated enrollment (7-8)		0.99	0
Estimated enrollment (9-12)		1.2	0
Special Ed enrollment (K)	8		
Special Ed enrollment (1-12)	45		
Special Ed (Self-Contained)	5.3		
Number of Teachers (K-6)			
Number of Teachers (7-12)			
WPU Value	$3,058	*(Except for CTE Add-on and Special Ed.*	
No. of Teachers (FTE) (CACTUS)	0		
School Administrators (CACTUS)			
Prior Year WPUs	449		
Low Income Students-prior year	0		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	449.0000	$ 1,372,860
Professional Staff	0.059507	26.7186	81,695
Restricted Basic School:			
Special Ed--Add-on	1.0000	54.7000	149,112
Spec. Ed. Self-Contained	1.0000	5.3000	16,205
Special Ed Pre-School	1.0000	5.3000	16,205

Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	$261.97 per K-8 ADM		138,844
Total WPU Programs		541.0186	$ 1,774,921
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$28.30 per WPU		$ 15,311
Special Populations			
Enhancement for At-Risk Students	$26.38 per student		13,981
Enhancement for Accelerated Stude	$5.00 per student		2,650
Other			
School Land Trust Program	$49.35 per student		26,156
Reading Achievement Program	$15.81 per student-Guarantee Program		4,822
	$1.33 per K-3 student		597
	$29.94 per low income student		-
Charter Administrative Costs	$100 per student		53,000
Educator Salary Adjustment (ESA)	$5,215 per qualified educator plus benefits		-
ESA-School Administrators	Ivy Preparatory Acade $3,104 per qualified administrator	y	-
Library Books and Resources	$0.960162 per student	535.3	514
Local Replacement Dollars	Average $1,665 per student		888,598
Total Non-WPU			$ 1,005,629

One Time			
Teacher Materials/Supplies[1, 2]	$176.33 per eligible F.T.E.	0	-
			-
Total One Time			$ -
ESTIMATED Total All State Funding			**$ 2,780,550**
[1]Steps one through three get $250; steps four or higher get $175			
[2]Steps one through three get $200; steps four or higher get $150			

Charter Name			FY19		
Second Year of Operation			**100% Enrollment**		
Number of Students:			530		
Grade Configuration:					
Revenue					
	Child Nutrition Program (CNP) and Lunchroom Sales			0	$0
	Student Activities		$168		
	Other		$0		
	Total Revenue from Local Sources (1000)		**$0**		
	Charter School Revolving Loan		X		
	State Educational Funding		$2,884,850		
	Total Revenue from State Sources (3000)		**$2,884,850**		
	Lunch and Breakfast Reimbursement			0	$0
	Restricted Federal Through State		$0		
	Programs for the Disabled (IDEA)		$77,168		
	Elementary and Secondary Education Act (ESEA)		$71,995		
	Total Revenue from Federal Sources (4000)		**$149,163**		
	Private Grants & Donations:		$0		
		Source(s) *(specify)*	$0		
	Loans:		$0		
		Commercial	$0		
		Other *(specify)*	$0		
	Prior Year Carryforward		$207,540		
	Total Revenue from Other Sources (5000)		**$0**		
	Total Revenue		**$3,034,013**		

Expenditures		**Number**	**Salary/Cost**	**Total**
	--- SALARIES ---			
10.131	Salaries - Teachers	21.00	$40,000	$840,000
10.132	Salaries - Substitute Teachers	0.50	$35,000	$17,500
10.161	Salaries - Teacher Aides and Paraprofessionals	10.00	$17,500	$175,000
10.100	Salaries - Other 1000-Instruction	0.00	$0	$0
	Total **10 (1000)-INSTRUCTION** Salaries (100)			**$1,032,500**
21.141	Salaries - Attendance and Social Work Personnel	1.00	$25,000	$25,000
21.142	Salaries - Guidance Personnel	1.00	$35,000	$35,000
21.143	Salaries - Health Services Personnel	0.25	$35,000	$8,750
21.144	Salaries - Psychological Personnel	0.25	$35,000	$8,750
21.152	Salaries - Secretarial and Clerical	0.00	$25,000	$0
21.100	Salaries - Other 2100-Student Support	0.50	$35,000	$17,500
	Total - STUDENT SUPPORT Salaries (100)	3.00		**$95,000**

22.145	Salaries - Media Personnel - Certified	0.00	$0	$0
22.162	Salaries - Media Personnel - Noncertified	0.00	$20,000	$0
22.100	Salaries - Other 2200-Instructional Staff Support	0.00	$20,000	$0
	Total - **INSTRUCTIONAL STAFF SUPPORT** Salaries (100)			**$0**
24.121	Salaries - Principals and Assistants	1.00	$75,000	$75,000
24.152	Salaries - Secretarial and Clerical	1.00	$25,000	$25,000
24.100	Salaries - Other 2400-School Administration	1.00	$60,000	$60,000
	Total **-SCHOOL ADMINISTRATION** Salaries (100)			**$160,000**
26.100	Salaries - Operation & Maintenance of Facilities	1.00	$35,000	$35,000
	Total **-OPERATION & MAINT OF FACILITIES** Salaries (100)			**$35,000**
31.100	Salaries - Food Services	0.00	$20,000	$0
	Total **-FOOD SERVICES** Salaries (100)			11 **$0** 0
	TOTAL - ALL SALARIES (100)			**$1,322,500**

TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)				**$160,000**
--- PURCHASED PROPERTY SERVICES ---				
26.400	Purchased Property Services			
26.441	Rental of Land & Buildings			$600,000
26.450	Construction and Remodeling			$0
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			**$600,000**
--- OTHER PURCHASED SERVICES ---				
27.510	Student Transportation services			$5,000
24.520	Insurance(other than employee benefits - e.g. D&O)			$0
45.521	Property Insurance			$0
45.522	Liability Insurance			$25,000
10.530	Communication(telephone and other)			$5,000
21.530	Communication(telephone and other)			$0
24.530	Communication(telephone and other)			$0
26.530	Communication(telephone and other)			$0
24.540	Advertising			$6,000
10.550	Printing and Binding			$2,000
21.550	Printing and Binding			$2,000
24.550	Printing and Binding			$0
10.560	Tuition			$0
21.570	Food Service Management			$0
21.580	Travel/Per Diem			$5,000
24.580	Travel/Per Diem			$0
26.580	Travel/Per Diem			$0
10.590	Inter-educational, Interagency Purchased Services			$0
TOTAL - OTHER PURCHASED SERVICES (500)				**$50,000**
--- SUPPLIES ---				
10.600	Instructional Supplies	20	$1,000	$50,000
10.641	Textbooks	0	$0	$35,000

21.600	Supplies - Student Support Services	20	$500	$10,000
22.644	Library Books	0	$0	$0
22.650	Periodicals	0	$0	$0
24.600	Supplies - School Administration	3	$1,000	$3,000
26.600	Supplies - Operation & Maintenance of Facilities	10	$1,000	$10,000
31.600	Supplies - Food Service	10	$1,000	$0
31.630	Food - Food Service			$0
TOTAL - ALL SUPPLIES (600)				**$108,000**
--- PROPERTY ---				
10.700	Property (Instructional Equipment) - Instruction			$0
21.700	Property - Student Support Services			$0
24.700	Property - School Administration			$0
26.700	Property - Operation & Maintenance of Facilities			$0
31.700	Property - Food Services			$0
31.780	Depreciation - Kitchen Equipment Depreciation			$0
49.710	Land and Improvements			$0
49.720	Buildings			$0
27.732	School Buses			$0
10.733	Furniture and Fixtures - Instruction			$0
24.733	Furniture and Fixtures - School Administration			$0
21.733	Furniture and Fixtures - Student Support Services			$0
10.734	Technology Equipment - Instruction			$35,000111
24.734	Technology Equipment - School Administration			$0
21.734	Technology Equipment - Student Support Services			$0
27.735	Non-Bus Vehicles			$0
10.739	Other Equipment - Instruction			$0

21.739 Other Equipment - Student Support Services $0

TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)				**$160,000**
--- PURCHASED PROPERTY SERVICES ---				
26.400	Purchased Property Services			
26.441	Rental of Land & Buildings			$600,000
26.450	Construction and Remodeling			$0
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			**$600,000**
--- OTHER PURCHASED SERVICES ---				
27.510	Student Transportation services			$5,000
24.520	Insurance(other than employee benefits - e.g. D&O)			$0
45.521	Property Insurance			$0
45.522	Liability Insurance			$25,000
10.530	Communication(telephone and other)			$5,000
21.530	Communication(telephone and other)			$0
24.530	Communication(telephone and other)			$0
26.530	Communication(telephone and other)			$0
24.540	Advertising			$6,000
10.550	Printing and Binding			$2,000
21.550	Printing and Binding			$2,000
24.550	Printing and Binding			$0
10.560	Tuition			$0
21.570	Food Service Management			$0
21.580	Travel/Per Diem			$5,000
24.580	Travel/Per Diem			$0
26.580	Travel/Per Diem			$0
10.590	Inter-educational, Interagency Purchased Services			$0
TOTAL - OTHER PURCHASED SERVICES (500)				**$50,000**
--- SUPPLIES ---				
10.600	Instructional Supplies	20	$1,000	$50,000
10.641	Textbooks	0	$0	$35,000

21.600	Supplies - Student Support Services	20	$500	$10,000
22.644	Library Books	0	$0	$0
22.650	Periodicals	0	$0	$0
24.600	Supplies - School Administration	3	$1,000	$3,000
26.600	Supplies - Operation & Maintenance of Facilities	10	$1,000	$10,000
31.600	Supplies - Food Service	10	$1,000	$0
31.630	Food - Food Service			$0
TOTAL - ALL SUPPLIES (600)				**$108,000**
--- PROPERTY ---				
10.700	Property (Instructional Equipment) - Instruction			$0
21.700	Property - Student Support Services			$0
24.700	Property - School Administration			$0
26.700	Property - Operation & Maintenance of Facilities			$0
31.700	Property - Food Services			$0
31.780	Depreciation - Kitchen Equipment Depreciation			$0
49.710	Land and Improvements			$0
49.720	Buildings			$0
27.732	School Buses			$0
10.733	Furniture and Fixtures - Instruction			$0
24.733	Furniture and Fixtures - School Administration			$0
21.733	Furniture and Fixtures - Student Support Services			$0
10.734	Technology Equipment - Instruction			$35,000112
24.734	Technology Equipment - School Administration			$0
21.734	Technology Equipment - Student Support Services			$0
27.735	Non-Bus Vehicles			$0
10.739	Other Equipment - Instruction			$0

21.739 Other Equipment - Student Support Services $0

	TOTAL - ALL SALARIES (100)			**$1,322,500**
	--- BENEFITS ---			
10.210	Retirement - Instruction	4%	$1,032,500	$41,300
21.210	Retirement - Student Support	4%	$95,000	$3,800
22.210	Retirement - Instructional Staff Support	4%	$0	$0
24.210	Retirement - School Administration	4%	$160,000	$6,400
26.210	Retirement - Operation & Main of Facilities	4%	$35,000	$1,400
31.210	Retirement - Food Services	0%	$0	$0
	Total - All Retirement			**$52,900**
10.220	Social Security/FICA/Unemployment/Workers Comp - Instruction	10%	$1,032,500	$103,250
21.220	Social Security/FICA/Unemployment/Workers Comp - Student Support	10%	$95,000	$9,500
24.220	Social Security/FICA/Unemployment/Workers Comp -School Admin	10%	$160,000	$16,000
26.220	Social Security/FICA/Unemployment/Workers Comp - Operation & M	10%	$35,000	$3,500
31.220	Social Security/FICA/Unemployment/Workers Comp - Food Services	10%	$0	$0
	Total - Social Security/FICA/Unemployment/Workers Comp			**$132,250**
10.240	Insurance (Health/Dental/Life) - Instruction	0%	$1,032,500	$126,000
21.240	Insurance (Health/Dental/Life) - Student Support	0%	$95,000	$18,000
24.240	Insurance (Health/Dental/Life) - School Administration	0%	$160,000	$12,000
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facility	0%	$35,000	$6,000
31.240	Insurance (Health/Dental/Life) - Food Services	0%	$0	$0
	Total- All Insurance(Health/Dental/Life)			**$162,000**
10.200	Other Benefits *(specify)* - Instruction	0%	$1,032,500	$0
21.200	Other Benefits *(specify)* - Student Support	0%	$95,000	$0
24.200	Other Benefits *(specify)* - School Administration	0%	$160,000	$0
26.200	Other Benefits *(specify)* - Operation & Maintenance of Facilities	0%	$35,000	$0
31.200	Other Benefits *(specify)* - Food Services	0%	$0	$0

	Total - All Other Insurance			**$0**
	TOTAL ALL BENEFITS (200)			**$347,150**
	--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---			
10.300	Purchased Prof & Tech Services - Instruction			$80,000
21.300	Purchased Prof & Tech Services - Student Support			$0
22.300	Purchased Prof & Tech Services - Instructional Staff Support			$0
24.300	Purchased Prof & Tech Services - School Administration			$80,000
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilities			$0
31.300	Purchased Prof & Tech Services - Food Services			$0
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			**$160,000**

TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)				**$160,000**
--- PURCHASED PROPERTY SERVICES ---				
26.400	Purchased Property Services			
26.441	Rental of Land & Buildings			$600,000
26.450	Construction and Remodeling			$0
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			**$600,000**
--- OTHER PURCHASED SERVICES ---				
27.510	Student Transportation services			$5,000
24.520	Insurance(other than employee benefits - e.g. D&O)			$0
45.521	Property Insurance			$0
45.522	Liability Insurance			$25,000
10.530	Communication(telephone and other)			$5,000
21.530	Communication(telephone and other)			$0
24.530	Communication(telephone and other)			$0
26.530	Communication(telephone and other)			$0
24.540	Advertising			$6,000
10.550	Printing and Binding			$2,000
21.550	Printing and Binding			$2,000
24.550	Printing and Binding			$0
10.560	Tuition			$0
21.570	Food Service Management			$0
21.580	Travel/Per Diem			$5,000
24.580	Travel/Per Diem			$0
26.580	Travel/Per Diem			$0
10.590	Inter-educational, Interagency Purchased Services			$0
TOTAL - OTHER PURCHASED SERVICES (500)				**$50,000**
--- SUPPLIES ---				
10.600	Instructional Supplies	20	$1,000	$50,000
10.641	Textbooks	0	$0	$35,000

21.600	Supplies - Student Support Services	20	$500	$10,000
22.644	Library Books	0	$0	$0
22.650	Periodicals	0	$0	$0
24.600	Supplies - School Administration	3	$1,000	$3,000
26.600	Supplies - Operation & Maintenance of Facilities	10	$1,000	$10,000
31.600	Supplies - Food Service	10	$1,000	$0
31.630	Food - Food Service			$0
TOTAL - ALL SUPPLIES (600)				**$108,000**
--- PROPERTY ---				
10.700	Property (Instructional Equipment) - Instruction			$0
21.700	Property - Student Support Services			$0
24.700	Property - School Administration			$0
26.700	Property - Operation & Maintenance of Facilities			$0
31.700	Property - Food Services			$0
31.780	Depreciation - Kitchen Equipment Depreciation			$0
49.710	Land and Improvements			$0
49.720	Buildings			$0
27.732	School Buses			$0
10.733	Furniture and Fixtures - Instruction			$0
24.733	Furniture and Fixtures - School Administration			$0
21.733	Furniture and Fixtures - Student Support Services			$0
10.734	Technology Equipment - Instruction			$35,000
24.734	Technology Equipment - School Administration			$0
21.734	Technology Equipment - Student Support Services			$0
27.735	Non-Bus Vehicles			$0
10.739	Other Equipment - Instruction			$0

21.739 Other Equipment - Student Support Services $0

10.739	Other Equipment - Instruction	$0
21.739	Other Equipment - Student Support Services	$0
24.739	Other Equipment - School Administration	$0
TOTAL - ALL PROPERTY (700)		**$35,000**
--- OTHER OBJECTS ---		
10.800	Other Objects- Instruction	$0
21.800	Other Objects- Student Support	$0
24.800	Other Objects- School Administration	$900
26.800	Other Objects - Operation & Maintenance of Facilities	$0
31.800	Other Objects - Food Services	$0
45.800	Other Objects - Building Acquisition	$0
	Total - All Other Objects	$0
10.810	Dues and Fees - Instruction	$900
21.810	Dues and Fees - Student Support	$0
24.810	Dues and Fees -School Administration	$0
26.810	Dues and Fees - Operation & Maintenance of Facilities	$0
	Total - All Dues and Fees	$0
TOTAL - OTHER OBJECTS (800)		**$1,800**
Total Building Acquisition & Instruction (4500)		
45.830	Inte rest	$0
45.840	Redemption of Principal	$0
Total other financing sources (uses) and other items		**$0**

1000	Total Local	$0
3000	Total State	$2,884,850
4000	Total Federal	$149,163

	TOTAL REVENUES	**$3,034,013**
100	Sal ries	$1,322,500
200	Employee Benefits	$347,150
300	Purchased Professional and Technical Services	$160,000
400	Purchased Property Services	$600,000
500	Other Purchased Services	$50,000
600	Supplies	$108,000
700	Property	$35,000
800	Other Objects	$1,800
	TOTAL EXPENDITURES	**$2,624,450**
Excess or D eficiency of Revenues over Expenditures		**$409,563**
Other Sources of Funding (5000)		**$0**
Net Asset Balance (Fund Balance)		**$409,563**
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)		**13%**
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)		**0.13499058**
Necessary Closure Fund (2 months Purch Prop Serv + Other)		**$100,300**

CHARTER SCHOOL WORKSHEET

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

Charter Name			
	Enrollment	**Rating Factor**	**WPU Generated**
Estimated enrollment (K)	80	0.55	44
Estimated enrollment (1-3)	225	0.9	202.5
Estimated enrollment (4-6)	225	0.9	202.5
Estimated enrollment (7-8)		0.99	0
Estimated enrollment (9-12)		1.2	0
Special Ed Pre-School			
Special Ed enrollment (K)	22.5		
Special Ed enrollment (1-12)	22.5		
Special Ed (Self-Contained)	4.5		
Number of Teachers (K-6)			
Number of Teachers (7-12)	0		
WPU Value	$3,146	*(Except for CTE Add-on and Special Ed.*	
No. of Teachers (FTE) (CACTUS)	21		
School Administrators (CACTUS)	1		
Prior Year WPUs	530		
Low Income Students-prior year	0		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	449.0000	$ 1,412,586
Professional Staff	0.059507	26.7186	84,059
Restricted Basic School:			
Special Ed--Add-on	1.0000	39.3750	107,336
Spec. Ed. Self-Contained	1.0000	4.5000	14,157

Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	$261.97 per K-8 ADM		138,844
Total WPU Programs		519.5936	$ 1,756,982
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	$28.30 per WPU		$ 14,705
Special Populations			
Enhancement for At-Risk Students	$26.38 per student		13,981
Enhancement for Accelerated Stude	$5.00 per student		2,650
Other			
School Land Trust Program	$49.35 per student		26,156
Reading Achievement Program	$15.81 per student-Guarantee Program		4,822
	$1.33 per K-3 student		705
	$29.94 per low income student		-
Charter Administrative Costs	$100 per student		53,000[116]
Educator Salary Adjustment (ESA)	5,215 per qualified educator plus benefits		109,515
ESA-School Administrators	$3,104 per qualified administrator		3,104
Library Books and Resources	$0.960162 per student	534.5	513
Local Replacement Dollars	Average $1,670 per student		887,270

Total Non-WPU $ 1,116,421

Local Replacement Dollars	Average $1,670 per student		887,270
Total Non-WPU			$ 1,116,421
One Time			
Teacher Materials/Supplies[1, 2]	$176.33 per eligible F.T.E.	21	3,703
			-
Total One Time			$ 3,703
ESTIMATED Total All State Funding			**$ 2,877,105**

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

Charter Name		**2019-2020**	
Second Operational Year		**100% Enrollment**	
Number of Students:		530	
Revenue			
Child Nutrition Program (CNP) and Lunchroom Sales		0	$0
Student Activities		$0	
Other		$0	
Total Revenue From Local Sources (1000)		**$0**	
State Educational Funding		$2,877,105	
Total Revenue from State Sources (3000)		**$2,877,105**	
Lunch and Breakfast Reimbursement		0	$0
Restricted Federal Through State		$0	
Programs for the Disabled (IDEA)		$77,168	
Elementary and Secondary Education Act (ESEA)		$71,995	
Total Revenue from Federal Sources (4000)		**$0**	
Private Grants & Donations:			
Source(s) *(specify)*		$0	
Loans:		$0	
Commercial		$0	
Other *(specify)*		$0	
Prior Year Carryforward		$409,563	
Total Revenue from Other Sources (5000)		**$0**	
Total Revenue		**$2,877,105**	
Expenditures	**Number**	**Salary/Cost**	**Total**

10.210	Retirement - Instruction	4%	$1,069,525	$42,781
21.210	Retirement - Student Support	4%	$103,000	$4,120
22.210	Retirement - Instructional Staff Support	0%	$0	$0
24.210	Retirement - School Administration	4%	$164,800	$6,592
26.210	Retirement - Operation & Main of Facilities	4%	$36,000	$1,440
31.210	Retirement - Food Services	0%	$0	$0
	Total - All Retirement			**$54,933**
10.220	Social Security/FICA/Unemployment/Workers Comp - Instruction	10%	$28,000	$106,953
21.220	Social Security/FICA/Unemployment/Workers Comp - Student Support	10%	$103,000	$10,300
24.220	Social Security/FICA/Unemployment/Workers Comp -School Admin	10%	$164,800	$16,480
26.220	Social Security/FICA/Unemployment/Workers Comp - Operation & M	10%	$36,000	$3,600
31.220	Social Security/FICA/Unemployment/Workers Comp - Food Services	10%	$0	$0
	Total - Social Security/FICA/Unemployment/Workers Comp			**$137,333**
10.240	Insurance (Health/Dental/Life) - Instruction	0%	$28,000	$126,000
21.240	Insurance (Health/Dental/Life) - Student Support	0%	$0	$18,000
24.240	Insurance (Health/Dental/Life) - School Administration	0%	$36,000	$12,000
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facility	0%	$0	$6,000
31.240	Insurance (Health/Dental/Life) - Food Services	0%	$1,373,325	$0
	Total- All Insurance(Health/Dental/Life)			**$162,000**
10.200	Other Benefits *(specify)* - Instruction	0%	$28,000	$0
21.200	Other Benefits *(specify)* - Student Support	0%	$0	$0
24.200	Other Benefits *(specify)* - School Administration	0%	$36,000	$0
26.200	Other Benefits *(specify)* - Operation & Maintenance of Facilities	0%	$0	$0
31.200	Other Benefits *(specify)* - Food Services	0%	$1,373,325	$0
	Total - All Other Insurance			**$0**
TOTAL ALL BENEFITS (200)				**$354,266**
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---				

--- SALARIES ---				
10.131	Salaries - Teachers	21.00	$41,500	$871,500
10.132	Salaries - Substitute Teachers	0.50	$36,050	$18,025

10.161	Salaries - Teacher Aides and Paraprofessionals	10.00	$18,000	$180,000
10.100	Salaries - Other 1000-Instruction	0.00	$0	$0
	Total **10 (1000)-INSTRUCTION** Salaries (100)			**$1,069,525**
21.141	Salaries - Attendance and Social Work Personnel	1.00	$28,000	$28,000
21.142	Salaries - Guidance Personnel	1.00	$40,000	$40,000
21.143	Salaries - Health Services Personnel	0.25	$35,000	$8,750
21.144	Salaries - Psychological Personnel	0.25	$35,000	$8,750
21.152	Salaries - Secretarial and Clerical	0.00	$25,000	$0
21.100	Salaries - Other 2100-Student Support	0.50	$35,000	$17,500
	Total - STUDENT SUPPORT Salaries (100)	3.00		**$103,000**
22.145	Salaries - Media Personnel - Certified	0.00	$0	$0
22.162	Salaries - Media Personnel - Noncertified	0.00	$20,000	$0
22.100	Salaries - Other 2200-Instructional Staff Support	0.00	$20,000	$0
	Total - **INSTRUCTIONAL STAFF SUPPORT** Salaries (100)			**$0**
24.121	Salaries - Principals and Assistants	1.00	$77,250	$77,250
24.152	Salaries - Secretarial and Clerical	1.00	$25,750	$25,750
24.100	Salaries - Other 2400-School Administration	1.00	$61,800	$61,800
	Total **-SCHOOL ADMINISTRATION** Salaries (100)			**$164,800**
26.100	Salaries - Operation & Maintenance of Facilities	1.00	$36,000	$36,000
	Total **-OPERATION & MAINT OF FACILITIES** Salaries (100)			**$36,000**
31.100	Salaries - Food Services	0.00	$20,600	$0
	Total **-FOOD SERVICES** Salaries (100)			**$0**
	TOTAL - ALL SALARIES (100)			**$1,373,325**
	--- BENEFITS ---			
10.600	Instructional Supplies			$20,000
10.641	Textbooks			$50,000
21.600	Supplies - Student Support Services			$10,000

22.644	Library Books			$0
22.650	Periodicals			$0
24.600	Supplies - School Administration			$3,000
26.600	Supplies - Operation & Maintenance of Facilities			$10,000
31.600	Supplies - Food Service			$10,000
31.630	Food - Food Service			$0
	TOTAL - ALL SUPPLIES (600)			**$103,000**
10.300	Purchased Prof & Tech Services - Instruction			$80,000
21.300	Purchased Prof & Tech Services - Student Support			$0
22.300	Purchased Prof & Tech Services - Instructional Staff Support			$0
24.300	Purchased Prof & Tech Services - School Administration			$80,000
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilities			$0
31.300	Purchased Prof & Tech Services - Food Services			$0
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			**$160,000**
	--- PURCHASED PROPERTY SERVICES ---			
26.400	Purchased Property Services			$0
26.441	Rental of Land & Buildings			$600,000
26.450	Construction and Remodeling			$0
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			**$600,000**
	--- OTHER PURCHASED SERVICES ---			
27.510	Student Transportation services			$5,000
24.520	Insurance(other than employee benefits - e.g. D&O)			$0
45.521	Property Insurance			$0
45.522	Liability Insurance			$25,000
10.530	Communication(telephone and other)			$5,000
21.530	Communication(telephone and other)			$0

24.530	Communication(telephone and other)			$0
26.530	Communication(telephone and other)			$0
24.540	Advertising			$6,000
10.550	Printing and Binding			$2,000
21.550	Printing and Binding			$2,000
24.550	Printing and Binding			$0
10.560	Tuition			$0
21.570	Food Service Management			$0
21.580	Travel/Per Diem			$5,000
24.580	Travel/Per Diem			$0
26.580	Travel/Per Diem			$0
10.590	Inter-educational, Interagency Purchased Services			$0
TOTAL - OTHER PURCHASED SERVICES (500)				**$50,000**
--- SUPPLIES ---				

--- OTHER OBJECTS ---		
10.800	Other Objects- Instruction	$0
21.800	Other Objects- Student Support	$0
24.800	Other Objects- School Administration	$900
26.800	Other Objects - Operation & Maintenance of Facilities	$0
31.800	Other Objects - Food Services	$0
45.800	Other Objects - Building Acquisition	$0
	Total - All Other Objects	$0
10.810	Dues and Fees - Instruction	$0
21.810	Dues and Fees - Student Support	$0
24.810	Dues and Fees -School Administration	$0
26.810	Dues and Fees - Operation & Maintenance of Facilities	$0
	Total - All Dues and Fees	$0
TOTAL - OTHER OBJECTS (800)		**$900**
Total Building Acquisition & Instruction (4500)		
45.830	Inte rest	$0
45.840	Redemption of Principal	$0
Total other financing sources (uses) and other items		**$0**

10.600	Instructional Supplies	$20,000
10.641	Textbooks	$50,000
21.600	Supplies - Student Support Services	$10,000
22.644	Library Books	$0
22.650	Periodicals	$0
24.600	Supplies - School Administration	$3,000
26.600	Supplies - Operation & Maintenance of Facilities	$10,000
31.600	Supplies - Food Service	$10,000
31.630	Food - Food Service	$0
	TOTAL - ALL SUPPLIES (600)	**$103,000**
	--- PROPERTY ---	
10.700	Property (Instructional Equipment) - Instruction	$25,000
21.700	Property - Student Support Services	$4,000
24.700	Property - School Administration	$5,000
26.700	Property - Operation & Maintenance of Facilities	$5,000
31.700	Property - Food Services	$0
31.780	Depreciation - Kitchen Equipment Depreciation	$0
49.710	Land and Improvements	$0
49.720	Buildings	$0
27.732	School Buses	$0
10.733	Furniture and Fixtures - Instruction	$0
24.733	Furniture and Fixtures - School Administration	$0
21.733	Furniture and Fixtures - Student Support Services	$0
10.734	Technology Equipment - Instruction	$30,000
24.734	Technology Equipment - School Administration	$0
21.734	Technology Equipment - Student Support Services	$0
27.735	Non-Bus Vehicles	$0
10.739	Other Equipment - Instruction	$0
21.739	Other Equipment - Student Support Services	$0

24.739	Other Equipment - School Administration	$0
	TOTAL - ALL PROPERTY (700)	**$69,000**
	--- OTHER OBJECTS ---	

10.800	Other Objects- Instruction	$0
21.800	Other Objects- Student Support	$0
24.800	Other Objects- School Administration	$900
26.800	Other Objects - Operation & Maintenance of Facilities	$0
31.800	Other Objects - Food Services	$0
45.800	Other Objects - Building Acquisition	$0
	Total - All Other Objects	$0
10.810	Dues and Fees - Instruction	$0
21.810	Dues and Fees - Student Support	$0
24.810	Dues and Fees -School Administration	$0
26.810	Dues and Fees - Operation & Maintenance of Facilities	$0
	Total - All Dues and Fees	$0
TOTAL - OTHER OBJECTS (800)		**$900**
Total Building Acquisition & Instruction (4500)		
45.830	Inte rest	$0
45.840	Redemption of Principal	$0
Total other financing sources (uses) and other items		**$0**

1000	Total Local	$0
3000	Total State	$2,877,105
4000	Total Federal	$0
TOTAL REVENUES		**$2,877,105**

100	Sal ries	$1,373,325
200	Employee Benefits	$354,266
300	Purchased Professional and Technical Services	$160,000
400	Purchased Property Services	$600,000
500	Other Purchased Services	$50,000
600	Supplies	$103,000
700	Property	$69,000
800	Other Objects	$0
	TOTAL EXPENDITURES	**$2,709,591**
Excess or D eficiency of Revenues over Expenditures		**$167,515**
Other Sources of Funding (5000)		**$0**
Net Asset Balance (Fund Balance)		**$167,515**
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)		**6%**
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)		**0.058223445**
Necessary Closure Fund (2 months Purch Prop Serv + Other)		**$100,000**