



Summit Academy and Summit Academy High School
Board Meeting Materials
May 19, 2022



Summit Academy Board of Trustees

1225 E 13200 South

Draper, UT 84020

March 23, 2022

6:30 PM

(PENDING)

Welcome

The meeting was called to order at 6:46 pm with Jon Eborn, Chelsea Welch, Robyn Derbidge, Bob Zentner, and Marcia Whitman attending. Ramona Baik and Joel Woodruff may join at a later time.

Public Comment

None

Work Session

Discussion and Action item to review

Joint LEAs-

Grievance Policy

Mr. Eborn states that we have a grievance policy that directs parents or employees to follow a process when they have a complaint. Sometimes they bypass that process. Ms. Welch states that it is important that we redirect them to go through the proper process. She reminds everyone that historically that is what the board has done. The board hasn't taken up a situation that has not gone through that process. Mr. Eborn clarifies that if someone complains to a member of the board, that you go work it out with the person that you have a complaint about. After that is done, then they can come to the board. Always point people back to the administration. Ms. Welch thought that a few years ago there was a case that caused the word change from must to may in a few special circumstances.

At 6:50 p.m., Ramona Baik joined the meeting

To restate, if a person has a problem with an administrator that could affect their employment, then it is possible to skip a step, but we always encourage conversations with those that there is a problem. In the past, there was only one situation where the board had to interfere. There was a question about a

recent situation in which a person wanted to bypass the school administrator and reached out to the board. The board suggested that they go back to that person, but then they requested that they speak to a board member first. These cases are not common and are treated very carefully. If someone wants to stay anonymous, then it ends there. We don't want to ever breach trust. Mr. Zentner wants to know if we ever give administrators or others a heads up, and we don't want to ever do anything without transparency. The board doesn't need feedback unless it is of a serious nature. Mr. Eborn wanted to discuss this so that we understand there will be situations where people want to talk about things in informal situations, and we just need to listen and recommend that they email the board about it.

Exhibit A Discussion and Draft Review

Chelsea Welch has been working with the staff of the charter board, specifically Marie and Liz. They came to the board and presented the idea of Exhibit A. The board decided to look at what an exhibit A would look like. They gave us an example Exhibit A to look at. It is their format, but our information. The Exhibit A is an agreement between our board and their board. They would like it to function in that way. It needs to define our charter. It is a very structured format. The ultimate goal is that we merge the high school and other schools into one LEA, one Charter. We can't have the financial part without this piece. Mr. Eborn says that we could merge the schools without doing the Exhibit A but it isn't the best idea. Ms. Baik states that the merger is pushing the board to do Exhibit A. The Charter Board would like the Summit to do this, because as it stands, they are having a hard time creating our accountability. The State wants something measurable so they can make us accountable. They gave us the information portion. We have the new mission statement that we worked hard on. We don't have a clear purpose at this point. Section #5 is key elements of the school. What makes Summit? What sets us apart from other schools. We don't want to be too specific nor too vague. We want to stick with elements that pertain to all grades at all campuses. How are we held to these? Every 5 years, they are supposed to do a comprehensive review. We were supposed to be reviewed a few years ago. They are behind schedule. We can do things that are not in the charter. Items that are in green are items that are required by the board. Section #7 is the year the school opened. We can memorialize things here from our old Charter. This can be changed. It is suggested that we specify K-8 and high school numbers. We don't need to break it down per campus. We want to make sure that our Charter and policy align. Chelsea Welch has done all of the heavy lifting on this. We need to create a solid timeline on this. Section #10 is the structure of the governing board. Ms. Welch asked if the bylaws could be used here and the USCB agreed as long as they are reviewed on a regular basis. This would be an attached appendix. #12 is our goal. The goal can be anything and as many things as we want. What is the reason that they continue to authorize our Charter. It is that we educate as well or better than other surrounding schools. Each principal has been given a list of schools to check into. Numbers 13, 14, and 15 are required by the State Board. We have a list of schools. Draper Park Middle school isn't included and we don't know why. There are not any private schools on the list. Independence and Bluffdale are not on Draper's list because they are too far away. Independence and Bluffdale do not wish to be on each other's lists. Mr. Eborn would like the board to take the pick that the principals suggest. Ms. Baik reminds board members that we are academically and financially responsible.

Joel Woodruff joined the meeting at 8:15 p.m.

Class size discussions are usually about the K-6. It is actually Kindergarten and then 1-6. Ramona Baik is asking about enrollment numbers. Ms. Baik reminds board members that we are academically and financially responsible when it comes to numbers in each class. Ms. Welch suggests that it might be necessary to have a Charter Fidelity Policy. This topic might be worth its own policy. Do we want this

topic negotiable? Ramona Baik suggests that we think about this issue about enrollment and move on for now. Mr. Zentner states that there must be flexibility with class numbers because of particular situations. Ms. Baik would like a hard number of students that we would allow in a class at Summit. Others are not sure that a hard number is the best idea. Chelsea Welch thinks that it could be the same with exceptions. This is up to us. Mr. Eborn clarifies the language that exists in the current Charter. He would like the board to stay out of the details. Ms. Welch suggests the number 29. Mr. Eborn likes the wording of Average and would like the board's input on that. Ms. Welch would like an average number by campus, not school wide. Ramona suggests that we leave these numbers and get feedback from the administration and move on. Ms. Welch says that not everyone is going to be happy with these numbers. The policies online will be the most accurate. Mr Eborn states that he would like this to be a policy driven board.

Moving on, we are not putting in an exact curriculum, but would like a more broad statement. Mr. Woodruff doesn't like using the words research based or evidence based. Ms. Welch suggests the description peer reviewed. We all agree that we don't want a rogue curriculum. For "B-E" it is all good. Do we like proficient plus? K-8 allows for dual immersion but it is not required. The high school is always expected to carry on the language on the DLI that we offer. Robin Derbidge would like to add the words "as applicable" to the offering grades 6-12 in the area of honors, AP, and Concurrent enrollment classes. Ms. Welch would like to see graduation rates mentioned in the document, but more research would need to be done on this. To understand this completely, you have to look at the percentage of special education students. Ms. Welch is going to ask the State Charter Board means by asking for State Accountability . Mr. Eborn would like to see that in printed form from the state so they can look at it. An aspirational goal would be that Summit High School would have graduation rates comparable to surrounding high schools. Don't include it in the Charter. Chelsea Welch is checking about H,J, and I and if they are required. She will also see if something needs to be done with Canyons District since our original documents say that we are part of Jordan School District.

Ramona asks that next time they have clear guidelines and time limits? Monday is the first deadline. Most Charter Schools have something in particular that they are focused on. This document will go to the administration next week. We can open this up to parents. We want to engage the Charter School Board. The more we get feedback, the faster it will move forward with the Board. How quickly we want to move forward is up to us. The State staff should have this back to us by April 1st. Ms. Welch suggests that a couple of board members meet with a few administrators to explain where their focus should be. Ramona Baik suggests that Chelsea Welch and Jon Eborn meet with a few members of the admin team. Jon Eborn would like another board member as well. Meeting will be scheduled for the week of April 5th. Depending on the feedback from that meeting will depend on how the first meeting goes. Board will meet on April 14th. Jon Eborn and Michael Clark will look at ways to best include parent feedback on this matter.

A Motion to adjourn was given by Chelsea Welch

A second was given by Marcia Whitman

Vote Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Robyn Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Meeting adjourned at 10:40 p.m.



Summit Academy Board of Trustees

1225 E 13200 South

Draper, UT 84020

April 14, 2022

7:00 PM

(PENDING)

Welcome

The meeting was called to order at 7:10 pm with Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robyn Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Public Comment

Jon Eborn welcomes everyone to the meeting and reminds the public that public comment will be limited to two minutes per comment.

Elizabeth Lao- She doesn't think that excluding online learning opportunities should be excluded from the strategic plan. There is a lot of positive learning that can be done online and distance learning. It doesn't have to be now, but we shouldn't take it off the table. She works in education, specifically online learning. There is a lot of data out there and doesn't want us to take this option off the table. Mr. Eborn says that it is required by the State to be there. She replied that she has spoken with the state and district Attorney and believes that there is a way that Summit could have that remain as a possibility. He asks that she follow up with Mr. Clark on the matter.

Emily Swanson- She is a parent of a 5th grade student at the Independence Campus in Bluffdale. She spoke a couple of months ago about the possibility of putting an auditorium/theatre into the high school. She knew that the city was offering money to go into it and found out that the money that they had went into the Hidden Valley Middle School. She would really like us to look into finding other money to put into that, especially if we get our numbers up. She would like to emphasize Summit get rid of Second Step. She isn't happy to see that the other programs we are looking at are also done by Castle.

Consent Agenda

Board Meeting Minutes

March 17, 2022

Board Policies

7301 LEA Data Governance Policy

3401 FERPA for Elementary and Secondary School Policy

3104 Dual Enrollment Policy
7103 Internet Safety Policy

A Motion to approve the Consent Agenda Items was given by Marcia Whitman

A second was given by Robin Derbidge

Vote - Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robyn Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Director's Report

Joint LEA's

Board Scholarships for UAPCS conference June 7 - June 8 We would love for you to attend it you can make it. Please let Kim Welch know right away. It is at the Layton Convention Center in Davis County.

Coming up in June is the 6th Annual Summit Academy Leadership Retreat June 20-June 21st. We would appreciate your attendance if possible.

We were awarded a special HEPA filter grant award. This will give us a separate filter system for almost every classroom in the district.

We have been awarded a continuous grant again this year. It is our ELL software grant award. We are excited about that.

We wanted to let you know about some Legislative teacher bonus money. This is for those teachers that supported other teachers during the latest Omicron surge of COVID. It was a difficult time of the year, and we look forward to rewarding those teachers for that.

Summit Academy

School fees compliance visit and check in. The USBE came out and sat down with us and went through everything with us so that they would be perfect. There were some adjustments that they wanted us to make. We have added that in there and they will show up for your approval. Mr. Zentner wants to know what we are trying to accomplish by offering summer school. Mr. Clark states that this is to help with the summer slide. It is more of an experiential program for those that want to keep learning through the summer. They have a lot of field trips and experience a type of learning to keep them engaged through the summer months. We are not looking at targeted student data. We do have a summer school program that we offer to boost them up, but that is not this program.

We have begun our EOY Assessments. We have begun our RISE testing as well. We are doing a little bit of this before spring break, and then the rest will happen after spring break.

Draper- Ms. Hatch

This past week we had our STEAM night. We had between 400-500 people attend. It was a huge success.

Our SPO - Yes Day Fundraiser was phenomenal. They had tons of activities that students could choose from. They would buy into those activities and this would raise money for the SPO. This event raised over \$10,000.00. In the past, the SPO fundraiser would bring in about \$3000.00. We are rethinking our fundraising activities in the future. The kids loved it. They could have free dress, wear hats, etc.

We had our Speech Festivals grades 3rd through 8th.

We had two of our students chosen for the 2022 State Finalists for the Utah's Challenge to Do the Write Thing

Bluffdale- Diana Brantley

March Math Madness- We have focused on all things Math through the month. This is all based on the idea that it is easy to support literacy at home, but not as much the math. We had Math night with lot of math activities set up all around the gym. We worked with Mathnasium and sent home all the directions for all the math games that night. It was very well attended. The newspaper was there and conducted a lot of interviews. It is awesome to watch parents and kids playing math games together.

The Speech Festival happened at our campus this year. This was the first year and it was beautiful! The students nailed it every time. They have been memorizing their poems every year.

We just kicked off our Rise testing celebration. We kicked it off at a great Assembly. Students created a video, and all the students watched it. The Dunk team, cheerleaders, and BYU mascot showed up and created a lot of excitement. The Dunk Team and Cheerleaders used the Summit testing language and showed off and got everyone excited about testing in the coming week! They made Ms. Brantley look cool and the newspaper is doing a story about that as well. The younger ones create posters and write good luck notes for the older students. It is a real positive thing.

Enrollment Updates- is that enrollment is up 55 students for next year.

Independence- Lisa Cutler

Ms. Cutler started out with student awards. "Do the Write Thing" State Sponsored writing contest: She had two students chosen for the 2022 State Finalists and three honorable mentions for the Utah's Challenge to Do the Write Thing as well. They get a banquet and a \$500.00 scholarship. Summit took 4 of only 24 spots available.

We had one of our 5th graders take 3rd place at the big Science Fair at BYU.

We have a lot of things this year that parents are coming to. Our theme this year is "Just Watch Me". Some of those are the 4th Grade Utah Program, the 6th Grade Shakespeare Plays, 1st Grade Bugz Program, Kindergarten Night & 1st Grade Night.

Partnerships for Middle School Success Pilot Participation. We are part of a unique partnership middle school success pilot program called We got training and coaching for about a year and a half, and we examine and assess how we are engaging our parents and community and ways we could do better.

Summit Academy High School- Angela Grimmer

Save the Date: Graduation May 26, 2022 @ 2:00pm. Caps and Gowns have arrived.

Spring Sports: A lot of our students are nationally ranked. Ryder on our baseball team is #1 in the state and 17th in the state for stolen bases. Lance Mercott is tied for 6 in Utah. Our signings in college. We have 8 boys playing college football, 2 girls playing college basketball, and 1 girl playing college volleyball.

Our HOSA (Health Occupation Students of America) team headed to Nationals this summer. The state representative was elected from our school.

The SPO meeting at the high school was successful and the parents involved there left excited and happy about the changes happening at the High School.

Debate team attended State
EOY Assessments and Finals
Student Body Elections have wrapped up.

Finance Report- Brad Wilkinson

Joint LEAs-

Finance Update- Our cash levels are still within the bond covenants. That puts us in a good position. It is a good reflection of if we could handle something like that. The financials look good. We are three quarters through the year. There is nothing too scary there. We are due to not meet bond covenants, but it is a one time occurrence, and it should be resolved with the lunch program next year. Talking to our bond holders, they are okay with a one time event that is easily explained and resolved. We knew it was coming. We are going in the right direction. All expenditures that are coming up in the summer have been planned for. It is just our routine maintenance. The bonus is coming and the time is from December to May. Summit Academy was awarded \$33,000, and the high school was awarded \$7,000. It is \$100.00 per occurrence. If a teacher stepped up and subbed 20 days, they would get a nice bonus. It runs through May 31st. The teachers know that this is coming. There is still some time for them to earn that. It is just licensed full time teachers. Any unspent funds go back to the state. They are restricted funds. If there isn't enough money, we will need to make up the difference. They did pass 4 additional professional development days over 2 years. Their assignment will go from 184 to 186 teaching days. May and June are pretty busy months wrapping up this year and budgeting for next year. First look will be in May and the final approval will be in June. We haven't over spent in any particular area. There will be a budget revision for sure because of bonus money that is coming.

Discussion and Action item to review

Joint LEAs-

Exhibit A discussion and possible action

The administration has had an opportunity to look at Exhibit A, but those notes have not been added for tonight's meeting. The parent's were also invited to give input on the Key Element portion of the document. . There were only one or two comments made for that. They desired to have volunteer hours be added into the charter. This gets a little tricky as far as accountability. Mr. Clark was asked about what the administrative team's comments looked like. The majority of the feedback came within the

class size. There was a little bit of worry about what plus learning looks like. Defining that better would be good. Six b is a concern. It is about reviewing the curriculum review annually to something like periodically rather than annually. The state wants to make sure what the review process review looks like. Some reviews will be pushed out. The change in language would be up to the Board. Take the reviewed part off. That happens when you choose the curriculum. You could detail it out within a policy. The board would be willing to have the administration set the timeline. The word annually will be taken out and replaced with ongoing administrative review. Key Element E6. Proficient Plus needs to be defined. Lisa Cutler- learning extended beyond grade level standards. Last area is the language concerning class size. Back up to A. [Brad Wilkinson](#) addresses the concern with a limit of 29 will force us to hire 5 new teachers. What stops us from hiring teachers and then enrollment drops. Do we fire a teacher? A hard 29 will open us up to some budget problems. The timing is not good for this change. We are at an average of 25. Some are 30 and some are 16. We need to be able to ebb and flow. Chris Lynn suggests an overall average. Mr. Wilkinson recommends that we say something to add flexibility. Mr. Wilkinson reminds us that there are certain bond covenants that we need to stay within. Small class size is one of them. The Amended Version of 6AC- Exceptions are given for group classes such as band, choir, etc, as well as in transitory situations. There is some concern that this limit's high school classes. The new wording will be- Exceptions are given for select secondary education classes and group classes such as band, choir, teams, etc, as well as in transitory situations.

A reminder to principals that they are happy with their lists of public schools in the area that they are researching comparables. We can make additions and subtractions. Mr. Clark reminds the board that our goal is to be better than the average of the surrounding schools.

There is a question about where the intercampus transfers occur in the list of enrollment preferences. How we currently do it is how we want to continue to do it.

The changes to Exhibit A read as follows:

6A: Class sizes shall be maintained as small as possible according to the following: Kindergarten- maximum of 25 students per class. Grades 1-12 are targeted for 25 students per class and a maximum of 29 students per class.

6C: Exceptions are given for select secondary education classes. Further exceptions are given for group classes such as band, choir, teams, etc, as well as in transitory situations.

6B: Curriculum is chosen based on research based best practice and is subject to ongoing administrative review.

6E: K-6 students may be provided extended learning beyond their grade level standards as determined by grade level assessments, etc. etc.

A Motion to approve the Exhibit A Charter as prepared in the Board meeting with additional formatting changes to address bulleting as well as the order of key elements for Summit Academy and Summit Academy High School was given by Chelsea Welch.

A second was given by Marcia Whitman

Vote Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robyn Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Board Bylaws

There is only one change. Board members can not be related to staff employees of Summit. It is best practice. Current board members are grandfathered in. It limits the possibility of getting a really good board member that may be related to someone who works at the school.

A Motion to adopt the proposed bylaws now stated with employees instead of staff was given by Chris Lynn.

A second was given by Marcia Whitman

Vote Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robin Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Board Member Committee Assignments-Jon Eborn

Jon Eborn would like to have conversations with board members to make some committee assignments on the board. He will have those conversations and decisions with individual board members.

Board Member visibility and shirts- Robyn Derbidge

We talked about the visibility of board members at Summit Academy events. If the board members are there to support, then the board is visible and supporting. Ramona mentioned that there is a board budget, and they can decide after they get more information about cost and what they would look like. It will help parents and staff identify who board members are. They will wear the shirt when they are attending as a supporting board member.

Emergency Operations Plan Presentation and Discussion - Scott Pettit

Scott Pettit shared a draft with the board last month. There have been some grammatical errors. This has been reviewed internally and externally. This has been a long process. We bring this to the board's attention so that the entire LEA knows that we have plans in place from lessons learned and best practices out in the community. It is a living document and will be reviewed annually and updated as situations and best practices and conditions change.

LEA Specific Licenses for SY2023 Alana Johnson

Alana is here to request approval of LEA specific licenses by the board. There is a list of nine educators that you are sponsoring licensure for from Summit Academy. They joined our schools mid-year or have taken on additional courses during the year. She has some paperwork for them to sign if the board approves.

A Motion to approve the specific licenses for SY2023 for Summit Academy and Summit Academy High School was given by Chris Lynn.

A second was given by Bob Zentner

Vote Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robyn Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Adherence to and procedure for Grievance Policy - Jon Eborn

This is mostly for new board members. We have a grievance policy for a reason. When a complaint comes up, our number one response should be to direct them to our grievance policy. Have them follow that process. That allows them to deal with the offending party. If they can't resolve the grievance, then deal with the administration of that campus. If they can't resolve it, then they need to take it to Mr. Michael Clark, our director, and if it can't be resolved there to take it to the board.

USBK Gender Guidance and District Policy discussion- Joel Woodruff

There was a lot of controversy on this subject at the State level. They have instructed that districts create their own policy without State input. Mr. Woodruff has put in countless hours of research to try and get this right. First and foremost, the district takes a stand of support for all groups. We need to have non-discriminatory practices in our schools so that we don't fall under the realm of legal ramifications.

Ramona Baik isn't clear that there are any actions that need to be taken right now. Mr. Clark says that there isn't anything written right now, that principals are working with individual families at this time. They would like board input on this. He believes that they could work on this with committee work on this. Chris Lynn wants to know what benefit we would have with leading out rather than wait for more guidance at the State level. Joel Woodruff thinks that we could put together a couple of paragraphs and be proactive to avoid significant issues later. Some schools had to act quickly and made some mistakes. We could eliminate some negatives of some difficult situations. Ms. Baik is interested in creating a policy surrounding this subject matter. At the very least we should create a statement as a beginning document. We could also be sued based on a policy. Policy and practice could bring a lawsuit. Chris Lynn liked the idea of some guard rails. He likes the idea of a few paragraphs. The accommodations are the issue and it needs to be handled very carefully. Lawsuits are the wave that is coming.

Policies:

Chelsea Welch would like to make sure that the revision history is reexamined with the date and all the changes that were made.

5105 Automated External Defibrillator (AED) Policy

5102 Medication Administration Policy

7102 Information Network Acceptable Use Policy - This policy will be pushed into May or June

4005 Nepotism Policy

1205 Copyright Policy

7000 IT Security Policy

6303 School Fee Policy and Fee Waiver Policy

6304 Fundraising Policy

A Motion to approve policy 5105 Automated External Defibrillator (AED) Policy, 5102 Medication Administration Policy, 4005 Nepotism Policy, 1205 Copyright Policy, 7000 IT Security Policy, 6303 School Fee Policy and Fee Waiver Policy, 6304 Fundraising Policy for Summit Academy and Summit Academy High School was given by Chris Lynn.

A second was given by Chelsea Welch

Vote Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robyn Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Summit Academy Mr. Michael Clark

Draper, Independence, Bluffdale 2021-2022 School Fees -

Draper, Independence, Bluffdale 2022-2023 School Fees -

We decided to do a summer camp for grades K-6. This is up for discussion and a vote next month. Chelsea Welch is commenting about the aggregates and clauses. She is asking for clarification on that. Mr. Clark sent new documents over to board members. At the very top, you will see that in the aggregates, we included the kindergarten enrichment and/or the summer camp options. Bob Zentner asked how these fees compare to surrounding schools. There is a registration fee and then there are weekly fees.

Committee Reports

Academic Committee- Ramona Baik - She has been attending the SAIP meeting of the steering committee SASP. They have been working so hard. She is impressed with their knowledge. She appreciates how Mr. Clark runs the meetings. The board will need to provide some data points as far as the board's role so that they can track their growth as far as parent communication, which is one component of the SASP. We need to help them honor their goals. She will compile that list for us.

-

Finance Committee Chris Lynn- Nothing additional

-

Audit Committee- None

-

Governance Committee-

-

Development Committee- Jon Eborn will contact board members individually

Mr. Clark is excited about the summer and plans for next year. It's important for the board to recognize the big things that the administration is taking on with the help of all staff members. Portrait of a Graduate as well as more individualized education for students. There are good changes happening on the horizon!

Board Business

Action Items - None

Annual Calendar -None

Follow -Up

- 9/16/2021 Michael Clark
 - More information on Early Light Academy's emergency response.
- 9/2/2021 Jon Eborn
 - Legacy family letters
- 11/18/2021 Michael Clark
 - SEL proposed curriculum in April or June
- 1/27/2021 Scott Pettit
 - Safety Manual
 - Final Draft of Plan - March 17
 - Board Approval - April Board Meeting

- Admin Training - Late-April
 - Table-top Exercises with Admin - June
- 1/27/2022 Scott Pettit
 - Risk assessment in July, Board review in August

Board Meeting Assessment

To our school Director, What is concerning you?

Mr. Clark is excited about the summer and plans for next year. It's important for the board to recognize the big things that the administration is taking on with the help of all staff members. Portrait of a Graduate as well as more individualized education for students. There are good changes happening on the horizon!

Next meeting - May 19, 2022 at 7:00 p.m.

Individual Meeting Assessment

Closed Session

A Motion to go into closed session for the purpose of discussion of the character, professional competence, or physical or mental health of an individual was given by Ramona Baik

A second was given Bob Zentner

Vote Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robyn Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Open session resumed at 11:09 p.m.

A Motion to adjourn was given by Ramona Baik

A second was given by Marcia Whitman

Vote Yes- Jon Eborn, Chelsea Welch, Ramona Baik, Chris Lynn, Robin Derbidge, Joel Woodruff, Bob Zentner, and Marcia Whitman.

Motion carries

Adjourned at 11:10 p.m.



Summit Academy and Summit Academy High School
Board of Trustees Meeting
3/17/2022
Director Report:

Academics:

August 2021

Include information on academic such as: Testing results, Program Updates, Program Development, Early Literacy Program, data presented at MTSS meetings, etc.

LEA: USBE has not yet release the RISE data for SY2021. It is anticipated that this data will be officially released in October. I have shared with you very preliminary RISE data through Google. Our Assessment Director Jumana Beseiso transferred this data to google in June. It is anticipated that this data will change once USBE completes their audit. I have also shared with the board EOY Acadience data.

SA: SA Draper will be the new host of our self-contained special education class. This class will be housed above the gym at the Draper elementary. This location is ideal for this class because of its more private location.

SAHS: The Early College Learning Center has been completed at SAHS. This center will give students a space to work on college courses, complete assignments, or study for exams.

Online: The online program will be different this year due to the low numbers of students participating. SA has purchased Engenuity for the 50 online students. Engenuity is self-directed online curriculum. Our students will log in and follow along with the program step by step until completing. Our online program will be housed at the Draper campus and will consist of one teacher and one paraprofessional. It is anticipated that SA will phase out the online program at the completion of this school year.

September 2021

New data drive: I have shared a new Google drive with you called Data. This drive will be used to communicate to you all data that we use as an LEA to inform our decisions. This drive will also house all the data for our LEA. Over time, I will move previous years data over to this drive so that it is all in one place. For now, the EOY Acadience data for SY21 is in the drive.

Acadience Data: We have cleaned up the SY21 EOY Acadience data and have shared that with you through the new Google data drive.

October 2021

No new updates

November 2021

Our early literacy specialist Melanie Kunz presented the BOY literacy data to our MTSS team. This power point may be found in your shared drive called “data”. We are currently working on aggregating and preparing our BOY acadience math scores. This data will be shared with you when it is ready. SY21 EOY RISE data has still not been made available and we are waiting on updates from USBE.

January 2022

We will be presenting the SY21 EOY RISE data to the board in the board meeting. We will also be presenting the SY22 BOY and MOY for acadience reading and math.

February 2022

We will be presenting the SY21 EOY RISE data to the board in the board meeting. We will also be presenting the SY22 BOY and MOY for acadience reading and math.

March 2022

No new updates

April 2022

We have hired a new instructional coach who will also be our lead ELL coordinator for the LEA. Her name is Lizzie Matheson. Lizzie has worked at our Bluffdale campus and has an ELL endorsement and has worked in ELL in a prior assignment. We are excited for Lizzie to support our growing ELL population.

We have changed the name of the Summit Academy Improvement Plan (SAIP) to the Summit Academy Strategic Plan (SASP). This name better aligns with State initiatives and compliance reports we are obligated to complete. The SASP is coming along. We should have a final SASP ready for approval in June.

[The process to find a new SEL curriculum](#) has been ongoing. We are nearing the end of the parent review committee to review the curriculum. The leadership decision making team will meet next week to make a determination on which curriculum to use moving forward.

[Our generic curriculum selection process is linked here for your convenience.](#)

May 2022

We have decided to offer all-day kindergarten at each one of campuses. Independence will offer two classes while Draper and Bluffdale will offer one all day kindergarten class. USBE has indicated to us that an all-day kindergarten option will be required within the next 2-4years. This change will greatly benefit kindergartners in need of extra support.

Enrollment:

Include information on enrollment such as: current numbers, October 1st count, exit data, etc.

LEA: Current school year (SY21) enrollment numbers can be found [here](#).

SA:
SAHS:
Online:

Compliance Reports:

Include information regarding report submission such as: Assurances, School Fees, Health Curriculum, LAND Trust, etc.

August 2021

LEA: All Land Trust committees are working on completing their bylaws. It is anticipated that these bylaws will be completed and ready for the September meeting.

SA:
SAHS:

September 2021

Per the board's defined Sex Ed Committee, we have organized a Sex Ed committee consisting of the following members:

Board Academic Chair
Kim Arminen- Draper 8th Grade Health Teacher
Gerel Altankhuyag- Draper Parent
Jaime Hockin- Independence 8th Grade Health Teacher
Annie Magnusson- Independence Parent
Kim Deem- SAHS Health Teacher
Cheryl McKay-SAHS Parent
Summit Academy Parent:

October 2021

The student fees assurances are due on Oct 31, 2021, they have all been completed. Last year there were several areas in which we were not in compliance. This year we are 100% in compliance with student fees.

November 2021

No new updates

January 2022

We have submitted our Title 1 desk top monitoring tool. It has been accepted by USBE.

February 2022

CRDC report has been submitted
Trust Lands final report

March 2022

Trust lands plan for SY23

April 2022

School fees visit/audit was conducted on Wednesday April 13, 2022. We had minor corrections to both the 2021-2022 student fees schedule and the 2022-2023 student fee schedule.

May 2022

No new updates

Policy Development and Implementation:**August 2021**

LEA: Two policies will be brought to this August board meeting and are attached to the accompanying email. I have been working on a new process for reviewing and updating old policies.

SA:

SAHS:

September 2021

No new updates

October 2021

Due to recent trainings, we have clarified some parts of the fundraising policy. These changes include group fundraising, fundraising fees and the addition of state law references.

November 2021

We have several policies for review and board approval this month. These policies and cover sheets are available in the board packet.

- Extra-duty policy
- Whistleblower policy
- Enrollment policies

January 2022

Following the governance committee meeting held last week, we have 13 policies for review. 7 of the policies are just formatting changes while 6 additional policies are either new or have updated content.

February 2022

We are working through our policy hiccups but should have a smoother process in the future

March 2022

No new updates

April 2022

No new updates

May 2022

We have just one policy this month, the School Meal Policy #6201. This policy governs the price of the meals for both breakfast and lunch. Due to labor and food cost increases the price of breakfast will increase by \$0.25 and lunch will increase by \$0.25.

Grants (supplemental to Finance Report):

(Include information regarding grants such as: any current grants, grant applications, grant reports, financial implications of failed grant applications, etc)

August 2021

LEA:

SA:

SAHS:

September 2021

No updates

October 2021

No updates

November 2021

No updates

January 2022

No updates

February 2022

No updates

March 2022

No new updates

April 2022

We have several policies for review. See the directors report and action items on the last page.

May 2022

We applied for and have received the All-Day Kindergarten (ADK) grant. This grant will allow us to offer an ADK class at each campus.

Procurements and Contracts (supplemental to Finance Report):

(Include information regarding Procurement and Contracts such as: proposed RFPs, current RFPs, proposed contracts, contracts up for review, current contract concerns, etc.)

August 2021

LEA: No new updates

SA:

SAHS:

September 2021

No updates

October 2021

No updates

November 2021

No updates

January 2022

No updates

February 2022

No updates

March 2022

No new updates

April 2022

The agreement with Lan King and SAHS has been executed. Lan King will begin finishing the unfinished space on the second floor soon.

May 2022

No new updates

Safety

(Include information regarding Safety such as: COVID updates, safety inspections, drills, emergency response plan development, safety incidents, etc.)

August 2021

LEA: Due to the Salt Lake County Council overturning the facemask ban we will not require facemasks at SA and SAHS. We will allow everyone to choose and decide for themselves if they want to wear a mask. We will continue to contact trace and notify parents when students have been exposed. We will also remind parents to keep their students' home when they experience any symptoms of any illness.

SA:

SAHS:

September 2021

Staff is working on various updates to safety plans including reviewing our Summit Academy Schools safety plan and protocol.

October 2021

No updates

November 2021

No updates

January 2022

A safety presentation will be presented in the board meeting. We will also be updating the board on current COVID-19 mitigation standards currently in place.

February 2022

No updates

March 2022

No updates

April 2022

Emergency Operations Plan will be presented by Scott Pettit.

May 2022

Busses passed the highway patrol inspection and audit. We are installing carbon monoxide detectors at the Draper campus to be in compliance with current law.

Staffing:

(Include information regarding staffing such as: hiring for administration positions, hiring for critical positions, staff contracts, staffing levels, staff changes (increasing, decreasing, eliminating positions), principal evaluations, data of teacher retention, etc.)

August 2021

LEA: HR Director Kathy Bracken is developing an exit interview protocol for all campuses to follow when teachers leave our LEA.

SA Draper: Draper had a retention rate of 93%. All key positions have been filled. Kelsey Harris was hired as the new vice principal to replace Paul Lundberg. The Draper campus does conduct exit interviews with staff who leave. Over the past two weeks, Draper has been completing improvements to the facilities, hosting registration for the jr. high students, and had a very successful back to school night.

SA Independence: Independence had a retention rate of 90% when calculated by FTE. All key positions are filled, and Independence is ready for school to begin on Tuesday. Exit interviews are not formally conducted but administration knows why each employee left SA. Moving forward, Independence will follow future LEA exit interview protocol. Over the past two weeks, Independence has hosted a successful jr. high registration and had a very successful back to school night.

SA Bluffdale: Bluffdale has had 100% teacher retention for the past two years. All key positions are filled and Bluffdale is ready for school to start. Bluffdale is looking for a part time front office staff and is hoping to fill this position soon. Due to 100% retention rate exit interviews have not been necessary, however, Bluffdale will use the LEA exit interview protocol when a staff member does leave the LEA.

SAHS: SAHS had a retention rate of 77%. SAHS has been able to replace these teachers that have left, and the high school is ready for Tuesday. SAHS did not conduct exit interviews but will follow district protocol once it is ready. Over the past two weeks, SAHS has hosted freshman orientation and registration for all grades. SAHS is finalizing a decision on an assistant principal.

September 2021

SAHS: SAHS is pleased to announce that Ben Jacobs has been hired as Vice Principal at SAHS.

October 2021

We have hired Kim Welch to work as an executive assistant to the executive director.

November 2021

No updates

January 2022

Intent to returns for staff have been sent out. Principals are in the initial stages of determining what their need will be for next school year.

February 2022

Kathy Bracken has announced she will retire at the end of the year
McKenzie Rowley will be leaving us from the finance department

March 2022

SAHS counselor Kristin Kinikini has resigned due to health concerns

April 2022

Tausha Phillips former administrative assistant at the Independence campus has assumed the accounting assistant position at the LEA.

Jennifer Hatch former administrative assistant at the Independence campus has been hired to fill the HR vacancy with the retirement of Kathy Bracken.

We have hired a new instructional coach who will also be our lead ELL coordinator for the LEA. Her name is Lizzie Matheson. Lizzie has worked at our Bluffdale campus and has an ELL endorsement and has worked in ELL in a prior assignment. We are excited for Lizzie to support our growing ELL population.

May 2022

We have hired Cara Bradley as our new CNP Director.

Facilities:

(Include information regarding facilities such as: Facility Improvement, Facility Development, etc)

August 2021

LEA:

SA Draper:

- Draper elementary school was painted
- Both the elementary school and jr. high school received durable wainscoting in the classrooms to protect the walls
- The jr. high roof was repaired
- The wood chips in the front of the jr. high was replaced with nice rock
- Several HVAC units were replaced
- The parking lot was repaired, sealed and resurfaced
- A map of the US, hopscotch and other games were painted in the elementary courtyard
- SPO made over the teacher lunchroom.

SA Independence:

- Both the elementary school and jr. high school received durable wainscoting in the classrooms to protect the walls

SA Bluffdale:

- The school received durable wainscoting in the classrooms to protect the walls

SAHS:

- New grass seed was placed in the front of SAHS. It looks a lot better. All the grass at SAHS looks better than it did last year. We hope to continue to improve the grass areas at SAHS.

- Early College Learning Center was completed upstairs
- The school received durable wainscoting in the classrooms to protect the walls

September 2021

No new updates

October 2021

No new updates

November 2021

SAHS is working on purchasing a monument style sign (similar to SA Bluffdale) for the SAHS.

January 2022

No updates

February 2022

No updates

March 2022

No updates

April 2022

No updates

May 2022

No updates

Marketing:

Include information regarding marketing such as: plan, timeline, cost, effect etc

August 2021

LEA: Please see the marketing attachment in the email

“What’s your Summit?” Spirit Shirt

As a part of this year’s Summit Academy theme, each student and teacher at SA and SAHS will receive a “What’s your Summit?” spirit shirt as well as a head lamp to light their journey as they summit their goals this year. The spirit shirts are a marketing tool and will be paid for with marketing funds. These shirts will help to develop a sense of Summit pride helping to build a strong school culture.

“What’s your Summit?” Banner

A “What’s your Summit?” banner will be hung at each school to remind students of their summit. It will also spark the interest of individuals who drive by the school.

Now entering Falcon Territory Banners

As drivers enter the Bluffdale and Draper neighborhoods that surround our campuses they will see banners announcing that they are entering Summit Academy Bear (or Bison, or Cub, or Falcon) territory. The intention of these banners is to continue to market the Bluffdale, Draper, Independence and SAHS as the neighborhood schools for the Bluffdale/Draper area. This creates an expectation of enrollment as well as a sense of pride in the school for the families in these areas.

School Merchandise

Each campus will be given \$1000 to stock shirts, sweatshirts, hats, decals and other Summit Academy pride merchandise to have on display and for purchase by our students. This helps to create a sense of pride in our school and our district.

Social Media Ads:

Over the course of the school year the school principal may have the discretion to “boost” any social media post for additional viewers. The cost of these social media ads varies as many factors are considered. Principals need a budget to be able to promote certain ads or social media posts. This money is intended for this purpose.

SA:

SAHS:

September 2021

No new updates

October 2021

We have been working with Oxygen Marketing. Oxygen Marketing has been working behind the scenes to improve and push web traffic to our sites. Our site has already moved places in web searches.

November 2021

We have made many changes to our website to improve the user experience when they are navigating and exploring our site. This will improve the experience for future students and families. Oxygen Marketing is continuing to drive traffic to our site and promoting Summit Academy. Oxygen Marketing has also secured a TV spot for us in December to promote Summit Academy German DLI program. They have promised to secure additional TV spots to be able to promote our other programs.

We have been engaged in our “What’s your summit?” assemblies recently. Students have enjoyed setting goals in their classrooms and in embracing the theme of this school year.

January 2022

Our marketing team has been very successful in moving Summit Academy Schools to the first page in web queries and in many searches, we are in the top 5 results

February 2022

We will have a marketing update from our marketing team

March 2022

No new updates

April 2022

Campuses have been analyzing heat maps from where their students are primarily coming from and are making strategic plans to target specific communities around their campuses.

May 2022

No new updates

Campus Updates, Celebrations, and Events:

Include information regarding celebrations such as: campus specific issues, milestones, staff achievements, sports, activities, events, etc

LEA: Campus activities, events and celebrations can be found [here](#).

SA:

SAHS:

Miscellaneous:

Include information regarding additional items not covered in other categories.

LEA: No new updates

SA:

SAHS:

Director's Presentation at Board Meeting:

August 2021

LEA: COVID response for SY22

SA Draper:

1. We were able to make a lot of updates at our campus this summer. New paint at the
2. elementary, new parking lot, rocks in flower beds, etc.
3. We painted a map of the United States in our elementary courtyard.
4. Our SPO redecorated our JH staff lounge and created a staff lounge for our elementary.

SA Independence:

1. We had one of our highest years of teacher retention this year at 90% when calculated by FTE.

2. Our staff and new student council banded together to take a bus to new neighborhoods in Lehi in the summer and distributed door hangers to advertise our school.
3. Our trip to German is becoming a reality!

SA Bluffdale:

1. Back to School Night was a success. We had almost all our new parents and many of our returning parents. Happy teachers, parents, and students! 😊
2. Immersion students met their Spanish teacher last night and several children left her room smiling and giggling, announcing that they can speak Spanish now! She taught them to say, “si.”
3. We have a wait list for our immersion program!

SAHS:

1. Early College learning Center
2. Introduction of Angela Grimmer

September 2021

Director’s Report:

Joint LEAs

- Fall Festivals
- Benchmarking is underway
- Parent teacher conferences are coming up
- We have begun meeting and working on a New Summit Academy Improvement Plan

Summit Academy

- Draper
 - Our first parent forum night was a success. Parents learned tips and tricks to using and understanding Aspire
 - We are getting more and more parents to subscribe to our social media accounts. We are getting 1-2 new subscribers each day. Our goal is to have just as many subscribers as we have families.
- Independence
 - Fall Fest (energy and excitement)
 - Teachers won our teachers/students soccer game and had so much fun!
- Bluffdale
 - Fall fest was wildly successful and the school community was so excited to be together again
 - City Journal-Highlighted our Spanish Immersion Program

Summit Academy High School

- Introduction of Ben Jacobs
- Football games have been very well attended
- Homecoming game 9/24
- Homecoming dance 9/25
- Fall Fest for High School

October 2021

Director's Report:

Joint LEAs

- Fall Festivals
- Benchmarking is underway
- Parent teacher conferences are coming up
- We have begun meeting and working on a New Summit Academy Improvement Plan

Summit Academy

- Draper
- Independence
- Bluffdale

Summit Academy High School

- Linebacker was featured in a Deseret News article

November 2021

Director's Report:

Joint LEAs

- “What’s your summit?” assemblies have been very successful
- Our staff holiday party at the theatre is back on! You should have RSVP already for the event. We are excited to be able to get back together as staff.
-

Summit Academy

- Draper
 - Student council hosted a haunted halls activity that the students and families really enjoyed.
 - Our reach out/lift up assembly was both exciting and fun for our Draper families.
- Independence
 - Our tree lighting with cereal box dominoes went well and now our Brighten the World Christmas project will begin. Our campus family and staff help between 8 and 12 families every year have Christmas.
 - We are preparing for our German singing at Christkindmarket at This is the Place Monument. All student in German DLI sing and then children in grades 5th through 6th participate in a lantern parade.
 - Lisa Cutler will be traveling to Boston to attend an educational conference that will help improving student outcomes.
- Bluffdale
 - Very successful STEM night. Soda may have sprayed all over the ceiling tiles. Students walked on liquid and made gallons of elephant toothpaste. Probably a few hundred people attended

- Veterans day assembly included an air force color guard and a 20-year army veteran. The students sang the national anthem for the speaker.
- Bluffdale is holding a fundraiser, if students reach their goal both Mrs. Howland and Mrs. Brantley will get a pie in the face.

Summit Academy High School

- Teachers, parents and students are all talking about the positive culture change at the high school
- We now offer after school tutoring in Math and a study hall that teachers oversee. The football team had a rise in overall GPA by attending the afterschool tutoring and study hall.
- Football made it to the semifinals in football
- We are still enrolling students.
- College week was a success and most of our seniors filled out at least one college application. We had a field trip to USU as a part of college week.
- Banners will soon be going up along the street in Bluffdale advertising SAHS.

January 2022

Joint LEA Action items:

1. Policies:

We have 7 policies that we have updated with formatting changes only. , aligned with current state law and best practice.

- Risk Management
- Home-Bound Instruction
- Background Check
- Breastfeeding in the Workplace
- Extra-Duty Assignments
- Section 504 of the Rehabilitation Act

Additionally, we have 6 either new or updated policies:

- URS Policy
- Whistleblower Policy
- Media Policy
- American Disability Act Policy
- Bus Post-Trip Inspection Policy
- Anti-Discrimination Policy (state required)

2. Changes to the 2021-22 school calendar to allow for a teacher PD day on April 25th due to the new LETRS requirement from USBE (See the cover sheet).
3. Summit Academy Schools and SAHS Land Trust Bylaws
4. Data presentation (Jumana Beseiso, Victoria Jenkins, Lindy Hatch, Bre Murdock)

5. IT presentation (Tanner Polatis)
6. Safety Update presentation (Scott Pettit)

Summit Academy LEA Action items:

1. None

SAHS LEA Action items:

1. None

Director's report:

Joint LEAs

- Our marketing team has been very successful in moving Summit Academy Schools to the first page in web queries and in many searches, we are in the top 5 results.
- Just completed our MOY so teachers are using updated data to support students. This is happening through our RTI process. Students will be progressed monitored and supported when deficiencies are found.
- Our enrollment window is open, and we are excited to see new families come to Summit Academy.

Summit Academy

○ Draper

- We had an amazing college week that ended with a fun career fair where we had several parents come in to share information on their careers.
- We brought back the National Scripts Spelling Bee. We had our 1st-4th grade finals on Tuesday Jan. 18, 2022. The 5th-8th grade finals are on the January 20, 2022. The top three winners from the 5th-8th grade finals will compete at the regional bee.
- We had our first open house. It was very successful. We had 14 new families attend.

○ Independence

- We were thrilled that 11 families let us help them at Christmas with our Brighten the World Giving Tree and extremely grateful to our school community (staff and families) for making it happen.
- Our Musical *Matilda Jr.* was truly delightful with three evening performances and a matinee.
- We have our writing contest wrapping up, our reading contest beginning, and we are looking forward to "Fly Up" day where students in the entire

school simultaneously visit the next grade to get excited about coming to Summit next year. We also have Literacy Night on February 1st.

- Lego Robotics students will be participating in “Robots in the Rotunda” FIRST Utah Day at the Capitol event on January 21st from 3:30-5:30
- Bluffdale
 - We had a successful Spanish Immersion Night that was well attended. Parents were rushing in this morning at 7:45 to be the first to turn in their application for the immersion program.
 - We are excited about our open houses which are planned for January and February.
 - We are keeping the energy peaceful and positive at the Bluffdale campus. Every morning we play a positive and upbeat song instead of ringing the warning bell. Students have begun spontaneous dancing in the atrium and the office/admin join with them. I’m not sure which group is leading out and which group is following but everyone is having a great start to the day!

Summit Academy High School

- Bears Give Back fundraiser, students raised \$11,900.00 for the Leukemia Foundation.
- Debate team won last two tournaments
- Two open houses happening January 19th and February 3rd
- Wrestling senior night to honor our senior wrestlers

February 2022

Joint LEA Action items:

1. Policies
2. Data presentation (Jumana Beseiso, Victoria Jenkins, Lindy Hatch, Bre Murdock)
3. Marketing Presentation from Tracey Smith from Oxygen Marketing

Summit Academy LEA Action items:

1. Trust Lands Final Report for Draper, Independence and Bluffdale
2. Trust Lands Bylaws
3. School Fees

SAHS LEA Action items:

1. Trust Lands Final Report
2. Trust Lands Bylaws
3. School Fees
4. Lan King Presentation

Director's report:

Joint LEAs

- Our marketing team has been very successful in moving Summit Academy Schools to the first page in web queries and in many searches, we are in the top 5 results.
- Just completed our MOY so teachers are using updated data to support students. This is happening through our RTI process. Students will be progressed monitored and supported when deficiencies are found.
- Our enrollment window is open, and we are excited to see new families come to Summit Academy.
- Counselor week

Summit Academy

- Draper
 - Parent forum night showed off curriculum, SPO, high school, after school program, robotics and coding.
 - Jr. High board game club started this week and has been a huge success
- Independence
 - Open house on Tuesday 5:30 elementary and 6:00 for jr. high
 - with a personal invitation to the 6th graders. Jr. High show case with 5 min rotations so that students get to see all classes
 - There will be tacos for taco Tuesday
 - 2021 RISE data shows that in comparison, the Jr. High had higher proficiency scores than the schools in the surrounding area.
- Bluffdale
 - We have had our 2nd New Enrollment Open House. It was so fun to meet our new families and talk about how great Summit is. Our 2nd Open House was last Tuesday.
 - We had White Ribbon Week 2 weeks ago. We focused on internet safety. The classes created their own internet safety super-hero and had a super-hero free dress day to wind up the week.

Summit Academy High School

- 5 Sterling Scholar finalists. They will be presented at the Bluffdale city council meeting
- 8 boys qualified for state and our first girl wrestler qualified for state

March 2022

Joint LEA Action items:

1. Policies
2. Legislative Update

Summit Academy LEA Action items:

1. Trust Lands Plan for SY23
2. School Fees

SAHS LEA Action items:

1. Trust Lands Plan for SY23
2. School Fees

Director's report:

Joint LEAs

Summit Academy

- Draper
 - DARE graduation last Friday
 - HOPE week including a kindness assembly
 - Mrs. Hatch and Mr. Clark were on Channel 2 Fresh Living talking about Summit's plus one program
- Independence
 - Literacy night was a huge success with a focus on building a love of reading.
 - Many authors presented
 - Crafts, book swap, book walk and a read aloud
 - Successful spelling bee competition.
 - Successful parent teacher conference with high attendance
- Bluffdale
 - 91% percent of parents attended parent/teacher conferences-a huge success
 - Scholastic book fair brought in nearly \$8000 for the school
 - Dr. Sues week was celebrated with dressing up as story book characters. Mrs. Brantley and Mrs. Howland read Dr. Sues in each classroom.

Summit Academy High School

- College acceptance and scholarships are coming in for our students. We currently are at an 80% acceptance rate at BYU
- Our senior Colby Fox was awarded Academic All-State presented by the Deseret News
- Spring sports are underway! Baseball, softball, track and field, girls golf, and boys soccer – Go Bears!!

- Course registration is underway for next school year, our students have had a great time going through the course catalog and selecting classes

April 2022

Consent Agenda:

1. Policies:
 - a. 7301 LEA Data Governance Policy
 - b. 3401 FERPA for Elementary and Secondary School Policy
 - c. 3104 Dual Enrollment Policy
 - d. 7103 Internet Safety Policy

Joint LEA Action items:

1. Exhibit A discussion and possible action
2. Strategy around the USBE gender guidance document
3. Emergency Operations Plan Presentation and Discussion
4. LEA Specific Licenses for SY2023

Policies:

- a. 5105 Automated External Defibrillator (AED) Policy
- b. 5102 Medication Administration Policy
- c. 7102 Information Network Acceptable Use Policy
- d. 4005 Nepotism Policy
- e. 1205 Copyright Policy
- f. 7000 IT Security Policy
- g. 6303 School Fee Policy and Fee Waiver Policy
- h. 6304 Fundraising Policy

Summit Academy LEA Action items:

1. Draper, Independence, and Bluffdale 2021-2022 School Fee Schedule - for public comment and board discussion
2. Draper, Independence, and Bluffdale 2022-2023 School Fee Schedule-for public comment and board discussion

SAHS LEA Action items:

1. No items

Director's report:

Joint LEAs

1. Board Scholarships for UAPCS conference June 6-June 7
2. 5th Annual Summit Academy Leadership Retreat June 21-June 22

3. HEPA filter grant
4. ELL software grant

Summit Academy

- School fees compliance visit and check in
- EOY Assessments have begun
 - Draper
 - Our SPO put on an amazing Yes Day Fundraiser. Our students had so much fun all day being told yes to doing fun activities like bubble ball battles, paint ceiling tiles, wearing free dress and hats and so many other things.
 - We held out speech festivals and had some amazing performances. IT was great to have that back.
 - We had two JH students selected as 2022 State Finalists for their participation the Utah's Challenge to Do the Write Thing and two other runner ups.
 - Independence
 - State sponsored writing contest "Do the Write Thing." There are 24 winners in the state (12 boys and 12 girls). We had two finalists and three honorable mentions. The finalists receive a \$500 scholarship and compete for the national competition. All five are invited to a state-sponsored banquet where they will be honored. We had a 5th grade student take 3rd place in the final science fair competition held at BYU.
 - Many student programs when parents/families can come and watch/participate:
 - 4th Grade Utah Program
 - 6th Grade Shakespeare Plays (each class does a different play)
 - 1st Grade Bugz Program
 - Kindergarten Night & First Grade Nights (students and parents met their teachers for 2022-23, learned about what their experience will look like for them next year, and received readiness tips for the summer)
 - Selected to participate in the *Partnerships for Middle School Success Pilot*.
 - The aim of this pilot is to support middle schools in strengthening family and community partnerships to increase student success and advance school improvement efforts.
 - As part of this work, your school community will receive training, coaching, and technical assistance from WestEd in developing essential partnerships between and among school staff, families, and local communities that reflect a shared responsibility to foster students' development and learning. UEPC (the Utah Education Policy Center) and USBE are partners in addition to WestEd for this pilot.

- Bluffdale
 - We had a very successful March Math Madness that culminated with Math Night. We had The City Journal attend Math Night and we are looking forward to reading the article in the April edition.
 - We held out 1st annual Speech Festival at the Bluffdale campus. We had to put it off by 2 years because of COVID. Both parents and teachers were very impressed, and the students were amazing.
 - Our enrollment for next year is 50 students more than we currently have. We are working hard to bring the quality of a Summit education to more families in the Bluffdale, Riverton and Herriman communities.

Summit Academy High School

- Graduation May 26, 2022 @2:00pm
- HOSA team headed to nationals
 - Brooklyn Stevenette has been elected as the Utah HOSA State Executive Council President.
- Debate team attended State with all team members placing
 - Ella Grover named Academic All-American
- EOY Assessments and Finals
- Our Baseball team is having a great season.
 - Ryder Parliment is ranked #17 in the nation and #1 in Utah for stolen bases, with Lance Marcotte tied for #6 in Utah.
- Our athletes are still in the process of signing with colleges
 - 8 students playing college football
 - 2 students playing college basketball
 - 1 student playing college volleyball.
- Student body elections are completed, and we have an amazing group of students representing the high school next year.

April 2022

Consent Agenda:

Joint LEA Action items:

1. School Meals Policy

Summit Academy LEA Action items:

1. Draper, Independence, and Bluffdale 2021-2022 School Fee Schedule
2. Draper, Independence. and Bluffdale 2022-2023 School Fee Schedule

SAHS LEA Action items:

1. Realigning Credits for Honors Graduation
2. Football Fall travel

Director's report:

Joint LEAs

1. UAPCS Conference June 6th-7th -board scholarships
2. 6th Annual Summit Academy Leadership Retreat June 20-June 21
3. SASP

Summit Academy

- All Day Kindergarten
- SEL Curriculum

Draper

- We had a great EOY JH music/dance concert. Many parents attended and enjoyed the show.
- We have finished RISE Testing and had a great Finals Week at the JH.
- Our elementary grades had all had their performances. Just a few weeks ago we enjoyed the first-grade program.

Independence

- 7th grade students' pass rate jumped from 32% last year in math to 51% this year (19% jump). 8th grade students' pass rate jumped from 47% last year in math to 57% this year (10% jump).
- The two new secretaries at Independence are rocking it.
- The trip to Germany has impacted students' learning. The students want to know if they are going to see and try the things that they are learning about.

Bluffdale

- We are starting a full-day kindergarten classroom.
- We held our first annual Cinco Di Mayo celebration.
- We'll be holding the 2nd annual Rockstar day to celebrate the winding up of another successful testing season.

Summit Academy High School

- Graduation May 26, 2022 @2:00pm

Summit Academy Preschool

- This year we started a new after school program at the Draper Campus and it has been a HUGE success! We now have an afterschool program that provides after hours care for all Elementary campuses.
- We are expanding our summer camp program, last summer we provided summer camp to preschoolers, this year we are expanding that program to Preschool through 6th grade this summer. The preschool summer camp will be held at Independence and Draper, the Independence preschool camp is full. The K-6th camp will be held at the Draper Campus and has over 70 students enrolled!
- This fall we are opening a 3-Year-old preschool class at the Bluffdale and Independence campuses and expanding the options for 4 year old preschoolers

with more class choices! Several of the preschool classes are already full for fall! We are excited to expand the program and invite more families into our Summit community!

SUMMIT ACADEMY SCHOOLS, INC

Draper

May 19, 2022

TO: Summit Academy Schools, Inc Governing Board

FROM: Brad Wilkinson, Business Administrator

SUBJECT: FY23 Annual Budget Adoption First Reading

BACKGROUND INFORMATION

Before June 30th of each fiscal year, a local school board should adopt a budget and make appropriations for the next fiscal year (FY23). There will be a first reading in the May Board meeting with Public comment, followed by an Adoption in the June Board meeting.

CURRENT CONSIDERATIONS

To review the proposed FY23 budgets for both Summit Academy Inc, and Summit Academy High School. Each budget is accompanied by some documents to help understand some aspects: Some of the attached documents include Legislative Estimates, Multi Year Facility Plans, Agreements between Summit Academy and Summit Academy High School, and other documentation. The Legislative WPU estimate for Summit Academy is 1,782 while enrolment is projected to be 2,069. The WPU estimate for Summit Academy High School is 622.25 while the Enrollment is expected to be 510.

IMPACT ON STUDENT ACHIEVEMENT

Each year the LEA's will prepare fiscal year budgets. The goal of each budget is to develop educational and operational goals in order to achieve academic success and fund other operations of the LEA. The financial statements presented will assist readers in reviewing and comparing financial data in order to achieve financial budget goals.

FINANCIAL IMPLICATIONS

The Financial goals are in place to meet students academic expectations while also meeting bonding and other financial metrics. The FY23 budget will be tighter than it has in the past due to declining enrollment. However, due to this we have built a budget that is projected to meet students needs, while also maintaining bonding and other financial metric goals. FY23 shows that Summit Academy will net and increase the fund balance by \$483,587, while Summit Academy High School expects to increase by \$403,426. The goal of increasing the Fund Balance is making sure we have a solid debt service coverage, and cash on hand during our declining enrolment.

RECOMMENDATIONS

To review and ask any financial related questions pertaining to the 2022-23 school year.

DIRECTOR'S RECOMMENDATION:

Approve the FY23 Adopted Budget for both Summit Academy, and Summit Academy High School.



FY23 Budget

Summit Academy (Independence, Draper, Bluffdale, LEA, Preschool)

Brad Wilkinson

Business Administrator

FY23 By Major Object (Local Revenues)

- Transportation \$25,000- Pending Merger, Preschool
- Interest \$150,000
- Student Sales \$375,000 (No more kids eat FREE)
- Fees \$117,000
- Fundraisers \$76,000 (German is in OFF year)
- Donations \$23,000
- Revenue from Other Schools \$99,743 (SAHS) if we merge, this goes away
- Preschool \$954,464
- Misc \$59,000

\$1,997,207

FY23 By Major Object (State Revenues)

- WPU Value +6% State Increase, Our Actual WPU is down from last year 4.5%- WPU Value is 4,038 (+6) WPU \$1,782.06 (HH). Actual WPU is 1,680. We are in a Hold Harmless.
- FY22 State Totals \$18,916,658
- **FY23 Proposed Totals \$19,815,610** (Includes some deferred Revenue)
- Restricted Budget- About \$11.8M
- Unrestricted- \$8.0M
- Received a Grant for ADK- \$128,000
- New Technology Funds \$238,000

FY23 By Major Object (Federal Revenues)

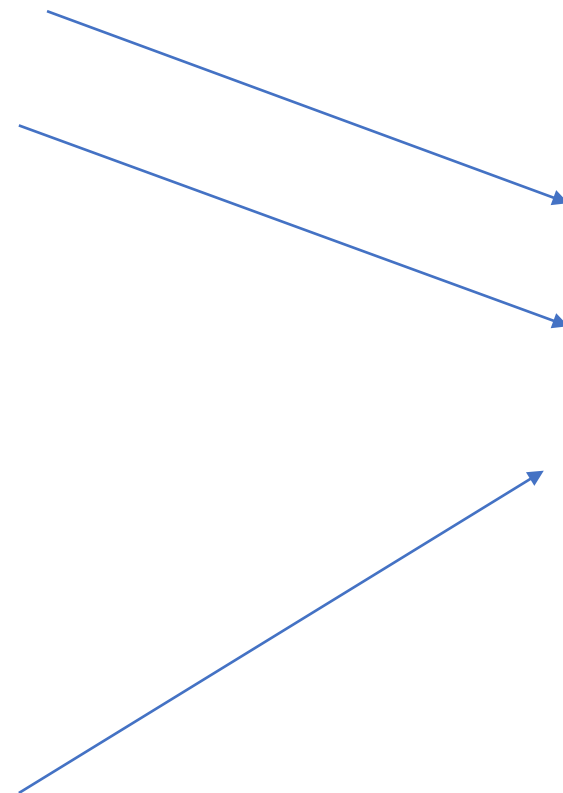
- IDEA (SPED) \$253,700
 - RDA (PD) \$25,000
 - NSP \$500,000 (Pending Every Kid Eats Free)
 - CARES (Deferred) No projected new monies \$450,000
 - Title IA \$45,000
 - Title IIA \$25,500
 - Title IVA \$10,000
- \$1,309,200**

FY23 By Major Object (Expenses)

• (100)- Salaries \$12,083,653	FY22 \$10,900,000
• (200)- Benefits \$3,643,450	FY22 \$3,748,417
• (300)- Prof Serv \$974,377	FY22 \$989,000
• (400)- Property Serv \$559,000	FY22 \$642,875
• (500)- Other Services \$234,800	FY22 \$192,900
• (600)- Mater & Supp \$1,679,400	FY22 \$1,600,000
• (700)- Capital \$440,000	FY22 \$825,000
• (800)- Debt Serv \$3,025,250	FY22 \$3,318,625

% Of Budget

- (100)- 53.6%
- (200)- 16.2%
- (300)- 4.5%
- (400)- 2.5%
- (500)- 1.0%
- (600)- 7.5%
- (700)- 1.7%
- (800)- 13.3%



Almost 82.9% of Operating Budget
(Salaries/Buildings)

The diagram consists of a list of budget items on the left and a summary text on the right. Four blue arrows originate from the list: one from '(100)- 53.6%', one from '(200)- 16.2%', one from '(400)- 2.5%', and one from '(800)- 13.3%'. These arrows all point towards the summary text 'Almost 82.9% of Operating Budget (Salaries/Buildings)'.

Net Increase (Decrease)

- FY23
 - Revenues \$23,122,017
 - Expenses \$22,639,930
 - Net Increase \$482,087
 - Bonding Metric Operating: 2.2, Needs to be near 3
 - Debt Coverage: 1.16, Needs to be near 1.3
 - Cash on Hand: 155 Days, Needs to be 30-90
 - Building Payment: 13%, Needs to be less than 20%
 - Need an increase of \$200,000 (Increased Revenue or Lower Costs)
 - Could come from Merger, or Revisions at Mid Year

100- Salaries Breakdown

- TOTAL = \$12,083,653
- 3% COLA for ALL staff
 - \$5,564,733 (Teachers)
 - \$1,043,594 (Classroom Paras)
 - \$614,283 (Preschool)
 - \$544,118 (Food Services)
 - New ADK, Increase of 2.0FTE plus benefits (Grant doesn't fully cover)
- Up \$1+M from prior year
 - Lunch Staff is increased
 - Preschool Increased
 - 3%

200- Benefits Breakdown

- TOTAL = \$3,643,450
 - Tier II URS and 401k rates changed slightly. No budget impact.
 - Additional staff have become eligible.
 - 5-10% Rate Increases
 - Workers Comp- Mod Factor increase (Year Behind)
 - Pre School Increases- Additional staff to receive Health
- Up \$50,000 from Prior Year

300- Professional Services

- *Special Education, Busing, Substitutes, Legal, Audit*
- SPED \$779,437
- Employee Training- Charter Conf \$60,000
- Legal and Audit \$33,000
- Substitutes (American Staffing) \$94,000, Includes LETRS
- Other Services \$7,940
- TOTAL **\$974,377**- Very Similar to Prior Year

400- Property Services

- Utilities (Water/Sewer)- Rate Increases \$78,000
- Cleaning Contract- \$112,000 (Draper, Bluffdale)
- Repairs/Maintenance \$155,000 (Next Slide)
- Bus Repairs \$30,000
- Lunch Program Repairs \$18,000
- Lawn Care/Snow Removal \$92,500
- Copier Lease \$71,000

Repairs and Maintenance Costs: 400 & 600

<u>Draper Campus</u>	<u>Cost</u>	<u>Company Name</u>	<u>Draper Campus</u>	<u>Cost</u>	
Fencing - Sidewalk on the Jr. High side	\$4,400.00	Allied Fencing			
New Phone System + phones	\$6,000.00	Startechtel.com Inc.			
Replace HVAC Units (1-2)	\$25,000.00	Salmon HVAC / Utah Engineer	Floor Wax	\$1,000.00	
Grass Seeding Elem	\$3,500.00	Prosecutive	Carpet Clean	\$2,393.06	
Grass Seeding Jr. High	\$12,500.00	Prosecutive	Gym Floor Refinish	\$2,500.00	
Install CO Detectors - Elementary	\$35,000.00	Requested by the Fire Marshal			
Install Co Detectors - Jr. High	\$45,000.00	Requested by the Fire Marshal			
Carpet Replacement Elementary Classrooms	\$6,000.00	Ameri Carpets			
Carpet Replacement Jr. High Hallways/ Office	\$24,000.00	Ameri Carpets			
<u>TOTAL:</u>	<u>\$161,400.00</u>				
<u>Indep Campus</u>	<u>Cost</u>	<u>Company Name</u>	<u>Indep Campus</u>	<u>Cost</u>	
Grass Seeding	\$12,500.00	Prosecutive			
Install Sidewalk on the north west side of the school	\$5,000.00	Waiting on final Quotes	Floor Wax	\$1,000.00	
			Carpet Clean	\$3,560.00	
			Gym Floor Refinish	\$5,000.00	
<u>TOTAL:</u>	<u>\$17,500.00</u>				
<u>Bluff Campus</u>	<u>Cost</u>	<u>Company Name</u>	<u>Bluff Campus</u>	<u>Cost</u>	
Grass Seeding	\$12,500.00	Prosecutive			
Parking Lot - Crack Seal	\$1,500.00	Bonneville Asphalt & Repair, LLC	Floor Wax	\$500.00	
			Carpet Clean	\$2,195.00	
			Gym Floor Refinish	\$2,500.00	
<u>TOTAL:</u>	<u>\$14,000.00</u>				
<u>TOTAL:</u>	<u>\$192,900.00</u>		Summer - Custodial/Maintenace	\$20,648.06	\$213,548.06
<u>SAHS Campus</u>	<u>Cost</u>	<u>Company Name</u>	<u>SAHS Campus</u>	<u>Cost</u>	
Food an Nutrition Classroom		Waiting on Quotes			
Parking Lot		Waiting on Quotes	Floor Wax	\$1,000.00	
Carpet Replacement - Front entrance (2)	\$2,550.00	Ameri Carpets	Carpet Clean	\$2,500.00	
Grass Seeding		Waiting on Quotes	Gym Floor Refinish	\$5,000.00	

500- Other Services

- Liability and Property Insurance \$81,000
- Communications (Phones) \$44,700 (Upgrade Draper Campus)
- Marketing \$73,000
- Board Expenses \$3,000
- Travel (Mileage, Trips, Out of State)- \$8,300
- Activities/Student Related \$6,500
- Athletic Services \$6,800
- SPO Services \$4,200
- Teacher Recruitment \$6,500
- **TOTALS \$233,300**
 - Insurance Rate Increases, New Phone System

MARKETING

- Each Campus has selected their own budget to push out things such as banners, ads, and other things to promote the school.
- The LEA has selected to continue on with the PR firm to support the website, behind the scenes clicks, Television Ads, liaison with media.
 - Have not negotiated the Contract yet
 - If over \$50,000- RFP, Board Approval

600-Supplies and Materials

- Classroom Supplies \$137,000
- Office Supplies \$43,000
- Copy Paper \$21,000
- Support Services and Other Materials \$88,800
- SPO \$47,000
- Utilities \$220,500
- Fuel \$19,000
- Curriculum \$143,000- Includes Dual Immersion Programs
- Technology \$231,100 (DTL, Technology Grant)- Staff and Students
- Softwares \$86,000- Includes EL Licenses
- Maintenance and Cleaning \$101,000
- Food for Lunch and Breakfast Program (Part of Spend Down Plan) \$425,000
- **TOTAL 600's= \$1,679,400**

Preschool Expenses

- Expense budget includes: Preschool Program , Enrichment Program , After School Program and Summer Camp
ADDING NEW SUMMER CAMP PROGRAM
 - ADDING MORE AFTER NOON PRESCHOOL CLASSES FOR 4 YEAR OLDS
 - ADDING 3 YEAR OLD PRESCHOOL CLASS AT BLUFFDALE AND INDEPENDENCE:
adding new classes brings added expenses.
 - After School and Summer Camp Transportation and Field Trip Fee's
 - Updating Preschool's math program to Singapore Math which has a math curriculum designed for preschoolers with hands-on manipulatives, games, and engaging activities.
 - Beginning of Year Supplies along with monthly supplies needed for classrooms
 - Funds for teacher appreciation gifts and recognition.
 - Funds to replace outdated Technology
 - Funds for Class Presenters

700- Capital Projects

- Carper Replacement Draper Campus \$40,000
- Fire Marshall requires additional CO2 fixtures \$75,000
- 2nd new School Bus \$125,000
- CNS Equipment Spend Down Plan \$100,000
- Facilities (Sound System at Indep./HVAC at all Campuses) \$100,000
- **TOTAL \$440,000**

800- Debt Services/Bond

- Principal \$975,000- Per Debt Schedule
- Interest \$1,870,750- Per Debt Schedule
- Dues and Fees \$105,000
- Carry Over for all Campuses \$74,500
 - These costs will eventually move up to the 300-600's
- TOTALS \$3,025,250

FTE- Class Size (Draper)

- Projections In:
 - K- 75 Students- Proposing 3 Classes @ 25
 - (1) New ADK Class
 - 1st- 81 Students- Proposing 3 Classes @27
 - 2nd- 93 Students- Proposing 3 Classes @31
 - Combo Class ½ to reduce class size
 - 3rd- 80 Students- Proposing 3 Classes @26.6
 - 4th- 88 Students- Proposing 3 Classes @29
 - 5th- 100 Students- Proposing 4 Classes @ 25
 - 6th-8th Middle School Model

Average Class Size of 27 K-5

FTE- Class Size (Independence)

- Projections In:
 - K- 75 Students- Proposing 4 Classes @ 18.75
 - 2 NEW ADK classes (Possible new students)??
 - 1st- 80 Students- Proposing 4 Classes @19.25
 - 2nd- 77 Students- Proposing 4 Classes @31
 - 3rd- 84 Students- Proposing 4 Classes @21
 - 4th- 98 Students- Proposing 4 Classes @24.5
 - 5th- 103 Students- Proposing 4 Classes @ 25.75
 - 6th- 91 Students – Proposing 4 Classes @22.75
 - 7th-8th Middle School Model

*Includes ALL Students- No breakout of English/German on this. If you need the Data please reach out

FTE- Class Size (Bluffdale)

- Projections In:
 - K- 80 Students- Proposing 3 Classes @26
 - (1) New ADK Class
 - 1st- 78 Students- Proposing 3 Classes @26
 - 2nd- 89 Students- Proposing 3 Classes @29
 - 3rd- 54 Students- Proposing 2 Classes @ 27
 - 4th- 62 Students- Proposing 3 Classes @ 20
 - 5th- 58 Students- Proposing 2 Classes @ 29
 - 6th- 51 Students- Proposing 2 Classes @ 25
- Overall Class size at Bluffdale is 25

LEA Staff

- Michael Clark (Director of LEA/SAHS)
- Brad Wilkinson (Oversight of Business Services, Budget, Financial, Risk, HR, Benefits)
- HR (Jen Hatch)- HR, Benefits, Data Entry
- Scott Pettit (Transportation, Grants, Safety, COVID, Risk)
- Alysha Hathaway (Facilities, Registrar, Oversees Technology)
- Kim Welch (Support to Director: Calendar, Notes, Policy, Liaison)
- Alana Johnson (LEA Lead over coaching, Licensing)
- Coach's (1 Per Campus, Grants, Curriculum, ELL)
- Food Service Director- NEW HIRE Restricted Program
- Remaining SNP Staff
- SPED (Restricted Program) Orion
- Assessments and Date (Jumana)
- Tausha Phillips (Accounting- AP, AR, Payroll)

SUMMIT ACADEMY HIGH SCHOOL

- FY23 Budget

FY23 By Major Object (Local Revenues)

- Transportation \$25,000- Pending Merger, Preschool
- Interest \$5,000
- Student Sales \$50,000 (No more kids eat FREE)
- Fees \$180,000
- Admissions (Gate) \$40,000
- Fundraisers \$65,000 (Includes Athletics)
- Donations \$30,000
- Uniforms \$25,000
- Rentals (Includes Church) \$30,000
- Consortium Revenue \$16,000
- Misc \$20,000

\$470,000

FY23 By Major Object (State Revenues)

- WPU Value +6% State Increase, Our Actual WPU is down from last year 4.5%- WPU Value is 4,776 (+6) WPU \$622.25
- FY22 State Totals \$5,487,571
- FY23 Proposed Totals \$6,164,673
- New Technology Funds \$76,163

FY23 By Major Object (Federal Revenues)

- IDEA (SPED) \$71,500
- RDA (PD) \$25,000
- NSP \$80,000 (Portions plus Liquor Tax)
- CARES (Deferred) No projected new monies \$250,000
- Title IA \$25,000
- Title IIA \$5,000
- Title IVA \$10,000

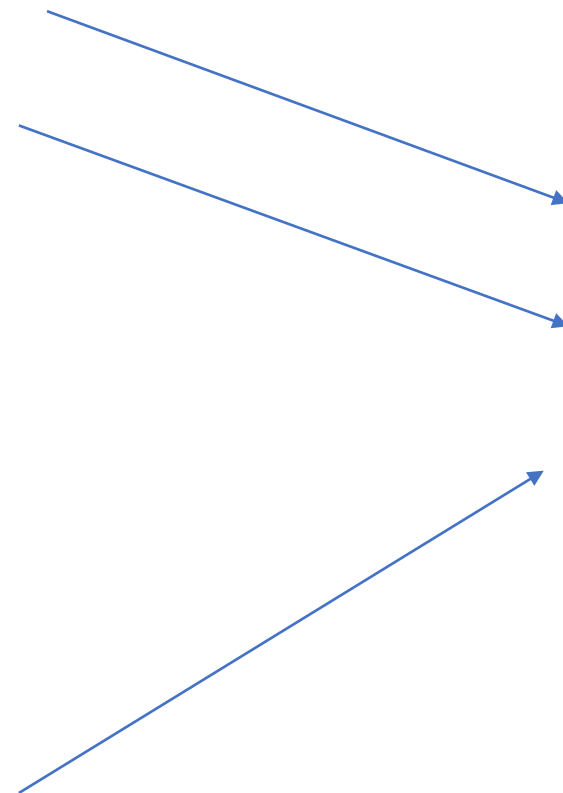
\$466,500

FY23 By Major Object (Expenses)

• (100)- Salaries \$2,403,231	FY22 \$2,361,019
• (200)- Benefits \$884,964	FY22 \$876,689
• (300)- Prof Serv \$249,243	FY22 \$263,870
• (400)- Property Serv \$106,000	FY22 \$96,000
• (500)- Other Services \$372,500	FY22 \$354,500
• (600)- Mater & Supp \$563,500	FY22 \$587,200
• (700)- Capital \$300,000	FY22 \$108,500
• (800)- Debt Serv \$1,818,309	FY22 \$1,505,009

% Of Budget

- (100)- 36%
- (200)- 13%
- (300)- 3.8%
- (400)- 1.6%
- (500)- 5.5%
- (600)- 8.3%
- (700)- 4.5%
- (800)- 27.4%



Almost 77.0% of Operating Budget
(Salaries/Buildings)

The diagram consists of four blue arrows pointing from the list of budget items to the summary text. The first arrow originates from the 36% value for item (100) and points to the first line of the summary. The second arrow originates from the 13% value for item (200) and points to the same first line. The third arrow originates from the 27.4% value for item (800) and points to the second line of the summary. The fourth arrow originates from the 5.5% value for item (500) and points to the same second line.

Net Increase (Decrease)

- FY23

- Revenues \$7,101,173

- Expenses \$6,697,747

- Net Increase \$403,426

- Bonding Metric Operating: 6.0, Needs to be near 3

- Debt Coverage: 1.26, Needs to be near 1.3

- Cash on Hand: 140 Days, Needs to be 30-90

- Building Payment: 25%, Needs to be less than 20%

- MERGER could change things

100- Salaries Breakdown

- TOTAL = \$2,403,231
- 3% COLA for ALL staff
 - \$1,412,081 (Teachers)
 - \$104,538 (Classroom Paras)
- Up \$50,000 from PY

200- Benefits Breakdown

- TOTAL = \$884,964
 - Tier II URS and 401k rates changed slightly. No budget impact.
 - 5-10% Rate Increases
 - Workers Comp- Mod Factor increase (Year Behind)
- Up \$15-20k from Prior Year

300- Professional Services

- *Special Education, Busing, Substitutes, Legal, Audit*
- SPED \$92,000 (Orion)
- Employee Training- Charter Conf \$20,000
- Legal and Audit \$30,000
- Substitutes (American Staffing) \$8,000
- Other Services \$99,743 (Chargebacks)
- TOTAL **\$249,243**- Very Similar to Prior Year, Slight Decrease

400- Property Services

- Utilities (Water/Sewer)- Rate Increases \$18,000
- Repairs/Maintenance \$45,000 (Next Slide)
- Kitchen Repairs \$2,500
- Lawn Care/Snow Removal \$24,000
- Copier Lease \$16,500
- TOTAL \$106,000

500- Other Services

- Liability and Property Insurance \$130,000
- Communications (Phones) \$11,000
- Marketing \$3,000
- Travel (Mileage, Trips, Out of State)- \$37,000
- Activities/Student Related \$13,500
- Athletic Services \$88,000
- SPO Services \$0
- Food Mgmt Services \$60,000
- Busing \$30,000
- **TOTALS \$372,500**
 - Insurance Rate Increases

600- Supplies and Materials

- Classroom Supplies \$66,000, Includes CTE
- Office Supplies \$5,000
- Copy Paper \$3,000
- Yearbooks \$13,000
- Extra Curriculars \$2,500
- Utilities \$96,500
- Teacher Appreciation \$6,000
- Curriculum \$58,000- Includes Dual Immersion Programs
- Technology \$130,000 (DTL, Technology Grant, ESSER III Spend Down)- Staff and Students
- Softwares \$4,000- Includes EL Licenses
- Maintenance and Cleaning \$15,000
- Food for Lunch and Breakfast Program (Part of Spend Down Plan) \$25,000
- **TOTAL 600's= \$563,500**

700's- Capital Projects

- There is \$300,000 set aside to get spaces built for a cooking class. We don't not have all quotes and totals back.

800- Debt Services/Bond

- Principal \$607,646- Per Debt Schedule, Musco Lighting
- Interest \$747,663- Per Debt Schedule, Musco Lighting
- Loan Repayment \$66,000- Goes away with Merger
- Carry Over for all Campuses \$90,000
 - These costs will go back up to 300-600's
- Economic Set Aside- In case enrollment does not go back up \$300,000
 - TOTALS \$1,818,309



LEA

WPU Value 4,038

WPU 1782.06

Enrollment 2025

Budget Detail Report

Revenue

	(2,371 Students)	(2,412 Students)	(2,065 Students)	
	FY2021 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
1000 Local				
1420 Transfer from High School - Transportation	\$ 33,150	\$ 25,000	\$ 25,000	
1510 Interest on Investments	\$ 175,413	\$ 184,060	\$ 150,000	
1610 Sales to Students	\$ 522,399	\$ 200,000	\$ 375,000	Kids no longer eat free
1710 Student Activities (Admissions, Store, Std Org Memb)	\$ 13,274	\$ 10,800	\$ 24,000	
1740 Fees	\$ 93,440	\$ 100,500	\$ 117,000	
1770 Fundraisers	\$ 41,130	\$ 122,000	\$ 76,000	
1910 Rentals	\$ 58,522	\$ 70,774	\$ 92,000	
1920 Contributions / Donations	\$ 20,031	\$ 23,000	\$ 23,000	
1930 Gain / Loss on Sale of Assets	\$ 4,411	\$ 2,000	\$ 2,000	
1950 Revenue from Other Schools (High School)	\$ 41,796	\$ 76,000	\$ 99,743	
1990 Miscellaneous	\$ 3,607	\$ 2,000	\$ 59,000	
1991 Preschool Income	\$ 247,036	\$ 447,500	\$ 954,464	Includes Rent
Informational				
Refinancing of Loan	\$ 48,060,573	\$ 65,849		
Total 1000:	\$ 49,314,782	\$ 1,329,483	\$ 1,997,207	
3000 State				
3010 Regular School Prgm K-12	\$ 7,386,617	\$ 7,055,503	\$ 7,034,016	
3020 Professional Staff	\$ 491,320	\$ 451,426	\$ 471,965	
3021 Educator PD Grant			\$ 213,905	
3023 Technology Fund			\$ 238,229	
3100 ADK Grant			\$ 128,000	
3105 Special Education -- Add-On	\$ 1,498,823	\$ 2,087,463	\$ 2,386,215	
3110 Special Education -- Self-Contained	\$ 72,340	\$ 54,913	\$ 53,504	
3120 Special Education -- Extended Year	\$ 15,059	\$ 6,484	\$ 2,259	
3125 Special Education - State Programs	\$ 57,896	\$ 23,030	\$ 26,191	
3128 SpEd -- Extended Yr SpEd Stipends	\$ 909	\$ 3,652	\$ 3,600	
3129 CTE Comprehensive Counseling	\$ 40,000	\$ 40,000	\$ 40,000	
3129 CTE College & Career Awareness	\$ 10,415	\$ 11,466	\$ 12,000	
3211 Gifted and Talented	\$ -	\$ -		
3230 Class Size Reduction - K-8	\$ 759,795	\$ 713,697	\$ 750,414	
3336 Enhancement for At-risk students	\$ 106,310	\$ 106,310	\$ 135,330	
3400 EL Software	\$ 9,385	\$ 26,800	\$ 13,851	
3410 Flexible Allocation	\$ -	\$ 304,832	\$ 226,342	
3520 School Land Trust	\$ 337,322	\$ 279,901	\$ 273,192	



	(2,371 Students)	(2,412 Students)	(2,065 Students)	
	FY2021 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
Budget Detail Report				
3540 Counseling Grant			\$ 100,000	
3542 Mental Health Grant	\$ 84,857	\$ 87,473	\$ 75,000	
3637 Dual Immersion Grant / Critical Languages Prgm	\$ 7,747	\$ 5,000	\$ 21,000	
3644 JBS STEM Endorsement Center Grants	\$ 91,138	\$ 127,114	\$ -	Didn't get for FY23
3655 Digital Teaching & Learning DTL	\$ 94,052	\$ 145,000	\$ 145,000	
3674 Suicide Prevention	\$ 423	\$ 2,000	\$ 2,000	
3677 Computer Science	\$ -	\$ 10,000	\$ 15,000	
3719 Charter School Local Replacement	\$ 5,280,282	\$ 5,893,582	\$ 5,994,736	
3725 Charter School Admin Costs	\$ -	\$ 226,963		
3770 School Lunch (Liquor Tax)	\$ 207,834	\$ 158,000	\$ 155,000	
3805 Early Literacy Program	\$ 63,185	\$ 94,668	\$ 111,812	
3806 TSSA (Teacher and Student Success Act)	\$ 371,064	\$ 404,998	\$ 462,866	
3807 TSSP (Tchr Sal Supplement Prgm)	\$ 320	\$ -	\$ 7,000	
3810 Library Books & Electronic Res	\$ 2,510	\$ 2,612	\$ 2,351	
3868 Teacher Supplies & Materials	\$ 19,350	\$ 19,340	\$ 18,927	
3876 Educator Salary Adjustment	\$ 647,387	\$ 647,387	\$ 647,905	
3882 Beverly Taylor Sorenson Elem Arts	\$ 52,816	\$ 59,000	\$ 59,000	
Total 3000:	\$ 17,709,156	\$ 19,048,614	\$ 19,826,610	
<i>4000 Federal (Reimbursement, Falls behind)</i>				
4522 IDEA Preschool		\$ 3,700	\$ 3,700	
4524 IDEA Part-B	\$ 368,372	\$ 250,000	\$ 250,000	
4524 Special Ed State Level Activity		\$ 35,000	\$ 25,000	
4560 National School Lunch Prgm	\$ 773,739	\$ 525,000	\$ 500,000	Kids no longer eat free
4700 CARES Act	\$ 252,662	\$ 578,087	\$ 450,000	
4801 Title IA		\$ 45,986	\$ 45,000	
4860 Title IIA	\$ 56,020	\$ 25,726	\$ 25,500	
4860 Title IVA	\$ 10,671	\$ 10,000	\$ 10,000	
Total 4000:	\$ 1,461,464	\$ 1,473,499	\$ 1,309,200	
Total Revenue:	\$ 68,485,402	\$ 21,851,596	\$ 23,133,017	



LEA

Budget Detail Report

Expenses

	(2,371 Students)	(2,412 Students)	(2,065 Students)	
	FY2021 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
100 Salaries				
112 District Administration	\$ 143,563	\$ 133,900	\$ 137,913	
114 Business Administrator	\$ 78,989	\$ 101,296	\$ 107,464	
115 Programs / Instructional Coaches	\$ 323,053	\$ 332,098	\$ 291,294	
121 Principals & Assistants	\$ 449,847	\$ 503,044	\$ 497,959	
131 Teachers	\$ 6,340,017	\$ 5,826,819	\$ 5,564,733	Includes (4) additional PD Days
132 Other Support Services			\$ 75,000	Includes ESSER II,III
133 Special Education Teachers	\$ -	\$ 100,000	\$ 855,434	
132 Substitutes	\$ 54,330	\$ 528,501	\$ 220,000	
133 Attendance	\$ 408,007	\$ 45,212	\$ 46,568	
134 Coaching Stipends	\$ 9,853	\$ 11,000	\$ 12,500	
134 Educational Stipends	\$ -	\$ 60,000	\$ 145,000	
142 Guidance Counselors		\$ 312,900	\$ 330,270	
143 Nurse		\$ 5,000	\$ 5,000	
145 Librarians	\$ 32,253	\$ 34,762	\$ 38,543	
152 Office Staff	\$ 212,385	\$ 227,935	\$ 357,911	
152 HR / Accounting / Mktg / Policy	\$ 76,731	\$ 103,000	\$ 135,000	
152 Special Education / CCGP Secretaries	\$ 38,701	\$ 77,017	\$ 7,321	
152 Board Secretary	\$ 1,905	\$ 3,000	\$ 3,000	
161 Testing Coordinator	\$ 33,230	\$ 60,100	\$ 61,903	
161 Classroom Paraprofessionals	\$ 1,048,164	\$ 928,617	\$ 1,043,594	
161 Special Education Paraprofessionals	\$ -	\$ 414,929	\$ 455,407	
172 Bus Driver	\$ 51,105	\$ 57,783	\$ 70,000	Hire full time, a few part time
181 Facility Supervisor	\$ 37,856	\$ 55,212	\$ 46,568	
182 Custodial / Maintenance Personnel	\$ 226,697	\$ 246,446	\$ 245,897	
184 Technology Support	\$ 81,375	\$ 117,000	\$ 120,973	
190 Incentives		\$ 117,000	\$ 50,000	
191 Food Services Personnel	\$ 371,862	\$ 420,000	\$ 544,118	
100 Preschool Salaries & Wages		\$ 30,000	\$ 614,283	
Total 100:	\$ 10,019,923	\$ 10,852,571	\$ 12,083,653	
200 Benefits				
210 URS Pension & 401k employer contributions	\$ 1,799,919	\$ 1,813,000	\$ 1,670,199	
220 Social Security & Medicare ER Match	\$ 720,121	\$ 819,235	\$ 787,885	
241 Health Insurance	\$ 785,737	\$ 840,219	\$ 968,109	
290 Health Savings Account (Employer)	\$ 82,607	\$ 75,500	\$ 80,000	
270 Worker's Compensation Fund	\$ 21,699	\$ 21,300	\$ 22,500	
280 Unemployment Insurance	\$ 8,419	\$ 8,000	\$ 10,000	



LEA

	(2,371 Students)	(2,412 Students)	(2,065 Students)	
<i>Budget Detail Report</i>	FY2021 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
290 Pre School Benefits & Payroll Taxes		\$ 42,500	\$ 104,757	
<i>Total 200:</i>	\$ 3,418,502	\$ 3,619,754	\$ 3,643,450	
300 Prof & Technical Services				
310 Professional Educational Services		\$ 7,000	\$ 2,500	
310 Bus Services			\$ 1,440	
310 Substitutes Services	\$ 71,067	\$ 84,000	\$ 94,000	
321 Support Services (Orion) (SpEd)	\$ 563,294	\$ 590,087	\$ 674,437	
323 Support Services (Not Orion) (SpEd)	\$ 58,599	\$ 109,500	\$ 105,000	
330 Employee Training & Development	\$ 67,642	\$ 113,498	\$ 60,000	Charter Conference
345 Business Manager Services	\$ 32,627	\$ -	\$ 2,000	
349 Legal Services	\$ 13,540	\$ 7,500	\$ 5,000	
355 Technical Services (IT)	\$ 3,852	\$ 1,500	\$ 2,000	
352 Audit Services	\$ 17,100	\$ 27,500	\$ 28,000	
<i>Total 300:</i>	\$ 827,721	\$ 940,585	\$ 974,377	
400 Purchased Property Services				
410 Water / Sewage / Garbage	\$ 85,177	\$ 75,450	\$ 78,000	
420 Cleaning Services (Vanguard Cleaning)	\$ 103,062	\$ 109,525	\$ 112,000	Alysha
431 Repairs / Maintenance / Monitoring	\$ 94,820	\$ 185,000	\$ 155,000	
432 Bus Repairs & Maintenance	\$ 26,264	\$ 44,000	\$ 30,000	
433 Repairs & Maintenance - Lunch Program	\$ 18,571	\$ 19,000	\$ 18,000	
435 Lawn Care & Snow Removal	\$ 85,317	\$ 82,900	\$ 92,500	
443 Copier Lease & Servicing & Mail Machine Rental	\$ 76,204	\$ 92,000	\$ 71,000	
450 Construction		\$ 2,500	\$ 2,500	
<i>Total 400:</i>	\$ 489,415	\$ 610,375	\$ 559,000	



LEA

	(2,371 Students)	(2,412 Students)	(2,065 Students)	
<i>Budget Detail Report</i>	FY2021 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
500 Other Purchased Services				
520 Property/Liability/Non employee Insurances	\$ 55,605	\$ 63,500	\$ 75,000	
520 Bus Insurance	\$ 6,089	\$ 6,200	\$ 6,500	
530 Communication (phone, phone stipends, postage..)	\$ 34,014	\$ 35,200	\$ 43,500	
540 Marketing	\$ 5,638	\$ 32,000	\$ 73,000	
542 Board Expenses	\$ 836	\$ 3,000	\$ 3,000	
580 Travel (Staff)	\$ 18,484	\$ 8,300	\$ 8,300	
591 Activities / Student Council	\$ 8,076	\$ 6,900	\$ 6,500	
592 Athletics - Services & Stipends	\$ 10,805	\$ 11,300	\$ 6,800	
593 SPO Service Expenses	\$ 3,437	\$ -	\$ 4,200	
599 Teacher Recruitment	\$ 400	\$ 1,000	\$ 6,500	
<i>Total 500:</i>	\$ 143,384	\$ 167,400	\$ 233,300	
600 Supplies and Materials				
610 Educational / Classroom Supplies	\$ 241,345	\$ 123,400	\$ 137,000	
611 Extracurricular Supplies	\$ 15,297	\$ 10,000	\$ 10,000	
612.1 Copy Paper			\$ 21,000	
612.2 Office Supplies	\$ 52,399	\$ 29,500	\$ 43,000	
613 Drama		\$ 3,200	\$ 3,200	
618 Support Service Materials (SpEd)	\$ 37,289	\$ 38,500	\$ 31,500	
618 CCGP (Counseling) Materials	\$ 8,103	\$ 24,000	\$ 21,600	
619 Training & Appreciation Supplies	\$ 6,805	\$ 18,000	\$ 26,000	
619 Athletics and Other		\$ 2,000	\$ 4,000	
613 Pre School Supplies & Materials	\$ -	\$ 90,050	\$ 100,000	
619 SPO Materials	\$ 19,858	\$ 53,000	\$ 47,000	
621 Natural Gas	\$ 39,831	\$ 44,000	\$ 45,500	
622 Electricity	\$ 147,579	\$ 159,000	\$ 175,000	
624 Fuel for the Buses	\$ 10,936	\$ 10,000	\$ 19,000	
631 Lunch Program Food	\$ 299,802	\$ 300,000	\$ 425,000	
641 Curriculum	\$ 352,059	\$ 189,000	\$ 143,000	
644 Library	\$ 3,366	\$ 4,000	\$ 3,000	
650 Tech Supplies (Under \$500)	\$ 200,921	\$ 164,613	\$ 231,100	
670 Educational Software	\$ 49,767	\$ 126,500	\$ 36,000	
670 QuickB / Acuity / Blackboard / Time Cards	\$ 7,826	\$ 176,500	\$ 50,000	
680 Maintenance & Cleaning Supplies	\$ 62,200	\$ 102,000	\$ 101,000	
680 Bus Maintenance Supplies	\$ 6,985	\$ 3,500	\$ 6,500	
<i>Total 600:</i>	\$ 1,562,368	\$ 1,670,763	\$ 1,679,400	
700 Property, Equipment				
710 Land & Site Improvements	\$ 31,576,727	\$ 99,000		



LEA

	(2,371 Students)	(2,412 Students)	(2,065 Students)	
<i>Budget Detail Report</i>	FY2021 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
720 Buildings			\$ 115,000	Carpet
732 School Buses	\$ -	\$ -	\$ 125,000	2nd Bus
733 Furniture	\$ 2,660	\$ 6,000		
734 Technology-Related Hardware & Software	\$ -	\$ 11,000		Technology Money
738 Kitchen Equipment	\$ 4,527	\$ 5,000	\$ 100,000	Spend Down Plan for CNS
740 Depreciation Expense	\$ 390,772			
739 Facility Equipment	\$ 3,469	\$ 122,500	\$ 100,000	HVAC, Sound System
<i>Total 700:</i>	\$ 31,978,155	\$ 243,500	\$ 440,000	
800 Debt Service and Misc				
810 Dues & Fees / Bank Fees	\$ 103,239	\$ 36,450	\$ 35,000	
<i>Informational</i>				
830 Interest (Series 2019 Bonds)	\$ 1,820,875	\$ 1,905,625	\$ 1,870,750	
840 Principal (Series 2019 Bonds)	\$ 15,345,000	\$ 920,000	\$ 975,000	
	\$ 48,052,596			
850 Carry Over		\$ 42,883	\$ 74,500	
844 Series 2019 Bonds - Moral Ob ins, rating, Trustee fee	\$ 1,130,869	\$ 85,000	\$ 70,000	
	\$ 49,873,471			
<i>Total 800:</i>	\$ 66,452,579	\$ 2,989,958	\$ 3,025,250	
<i>Total Expenses:</i>	\$ 114,892,047	\$ 21,094,906	\$ 22,638,430	
<i>Net Income:</i>	\$ (46,406,645)	\$ 756,690	\$ 494,587	2.1M needed from other sites- Leaves LEA 1,050,000, Add \$260,000 Revenues
		\$ 655,548	\$ 625,000	3% of Revenues (Minimum)



High School

WPU Value 4776

WPU 622.25

Enrollment 550

Budget Detail Report

Revenue

	(542 Students)	(505 Students)	(550 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
1000 Local				
1510 Interest on Investments	\$ 4,025	\$ 5,000	\$ 5,000	
1610 Lunch Program	\$ 8,610	\$ 21,500	\$ 50,000	
1710 Admissions	\$ 27,208	\$ 40,000	\$ 40,000	
1730 Student Organization Member	\$ 908	\$ 8,500		
1740 Fees (including: Spirit, Travel/Camps)	\$ 252,904	\$ 100,000	\$ 180,000	
1741 Uniform Rental	\$	\$ 143,000	\$ 25,000	
1750 School Vending & Store	\$ 2,195	\$ 5,000	\$ 8,000	
1760 Fines	\$ 331			
1770 Fundraisers	\$ 74,860	\$ 65,000	\$ 65,000	
1910 Rental (Youngblood)	\$ 31,849	\$ 30,000	\$ 30,000	
1920 Contributions / Donations	\$ 51,050	\$ 30,000	\$ 30,000	
1930 Gain / Loss on Sale Asset	\$ 900	\$ -	\$ 1,000	
1950 Rev From Other Schools (CTE Consortium Fee)	\$ 5,064	\$ 15,500	\$ 16,000	
1990 Miscellaneous	\$ 18,458	\$ 100,000	\$ 20,000	
Total 1000:	\$ 478,362	\$ 563,500	\$ 470,000	
3000 State				
3010 Regular School Prgm K-12	\$ 2,241,479	\$ 2,349,759	\$ 2,786,591	
3013 Foreign Exchange Students		\$ 7,064	\$ 12,114	
3014 PD Grant			\$ 54,046	
3015 Capital Technology			\$ 76,163	
3020 Professional Staff	\$ 141,523	\$ 148,227	\$ 174,271	
3105 Special Education -- Add-On	\$ 372,085	\$ 359,916	\$ 406,827	
3110 Special Education -- Self-Contained		\$ 15,871	\$ 3,051	
3120 Special Education -- Extended Year	\$ 4,338	\$ 2,259	\$ 2,259	
3125 Special Education - State Programs		\$ 6,652	\$ 7,534	
3128 Special Education - Ext Yr Stipends	\$ 519	\$ 2,204	\$ 2,204	
3200 CTE Admin	\$ 193,305	\$ 230,000	\$ 230,000	
3200 CTE Comprehensive Counseling	\$ 25,161	\$ 25,104	\$ 25,000	
3200 CTE Technical Student Orgs		\$ 2,677	\$ 2,677	
3200 CTE Skill Certification Competency		\$ 9,000	\$ 9,000	
3211 Gifted and Talented		\$ 6,381		
3212 Advanced Placement	\$ 3,146	\$ 6,000	\$ 5,000	
3400 EL Software		\$ 14,883	\$ 1,437	
33-5333 Concurrent Enrollment	\$ 17,024	\$ 41,473	\$ -	
33-5336 Enhancement for At-risk students	\$ 44,268	\$ 19,000	\$ 54,075	
3410 Flexible Allocation	\$ 2,083	\$ 67,000	\$ 52,020	
35-5420 School Land Trust	\$ 50,595	\$ 84,443	\$ 71,701	Do you have you \$
3542 Mental Health Grant	\$ 31,074	\$ 23,000	\$ 25,000	
3545 PRIME	\$ -	\$ 100,000	\$ -	
3627 Innovative Grant		\$ -		
3637 Dual Immersion Program			\$ 8,000	
3643 STEM Center Pilot	\$ 8,539	\$ 9,200	\$ 9,200	
35-5655 Digital Teaching & Learning	\$ 7,235	\$ 31,500	\$ 31,500	
3674 Suicide Prevention	\$ 2,066	\$ 1,000	\$ 1,000	
35-5677 Computer Science		\$ 15,000	\$ 15,000	



High School

Budget Detail Report

	(542 Students)	(505 Students)	(550 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
32-5619 Charter School Local Replacement	\$ 1,283,562	\$ 1,404,520	\$ 1,739,741	
32-5625 Charter School Admin Costs				
38-8070 School Lunch (Liquor Tax)	\$ 26,725	\$ 37,200	\$ 37,200	
35-5678 TSSA (Teacher and Student Success Act)	\$ 110,059	\$ 120,321	\$ 160,964	
3807 TSSP (Tchr Sal Supplement Prog)	\$ 13,556	\$ -		
3800 E Cigarette		\$ 7,000	\$ 5,000	
35-5810 Library Books & Electronic Res	\$ 650	\$ 690	\$ 615	
34-5868 Teacher Supplies & Materials	\$ 4,898	\$ 4,895	\$ 4,589	
3800 CTE Student Organizations		\$ -		
3876 Educator Salary Adjustment	\$ 164,512	\$ 164,512	\$ 148,594	
3990 State Revenues from Non US	\$ 5,089	\$ 2,300	\$ 2,300	
Total 3000:	\$ 4,753,491	\$ 5,319,051	\$ 6,164,673	
4000 Federal				
4524 IDEA Part-B	\$ 69,318	\$ 71,500	\$ 71,500	
4524 Special Ed State Level Activity	\$ -	\$ 25,000	\$ 25,000	
4560 National School Lunch Programs	\$ 93,486	\$ 39,000	\$ 80,000	
4700 CARES Act	\$ 89,899	\$ 275,000	\$ 250,000	
4800 Title IVA	\$ -	\$ 10,000	\$ 10,000	
4801 Title IA	\$ 17,777	\$ 26,400	\$ 25,000	
4860 Title IIA	\$ 1,886	\$ 6,000	\$ 5,000	
Total 4000:	\$ 272,366	\$ 452,900	\$ 466,500	
Total Revenue:	\$ 5,504,219	\$ 6,335,451	\$ 7,101,173	



High School

Budget Detail Report

	(542 Students)	(505 Students)	(550 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
Expenses				
100 Salaries				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
115 AD / CTE Con / Grant Prgm Specialists	\$ 129,907	\$ 109,200	\$ 112,500	
121 Principals & Assistants	\$ 204,104	\$ 172,200	\$ 171,289	
131 Teachers	\$ 1,379,180	\$ 1,274,316	\$ 1,412,081	Includes PD as well
132 Substitutes	\$ 11,707	\$ 20,610	\$ 10,000	
133 Special Education Teachers	\$ 158,797	\$ 195,626	\$ 179,809	
134 Coaching Stipends	\$ 70,874	\$ 70,000	\$ 72,000	
134 Educational Stipends	\$ 2,550	\$ 22,000	\$ 15,000	
142 Guidance Counselor (Including SPED)	\$ 132,194	\$ 133,958	\$ 117,322	
152 Secretary -- Counseling / Special Education	\$ 7,287	\$ 7,000	\$ 7,000	
152 Office Personnel	\$ 77,619	\$ 81,250	\$ 100,362	
162 SpEd Paraprofessionals	\$ 136,202	\$ 117,973	\$ 104,538	
180 Incentives	\$ 11,900	\$ 10,000	\$ 10,000	
182 Custodians	\$ 112,732	\$ 91,094	\$ 91,330	
Total 100:	\$ 2,435,053	\$ 2,305,227	\$ 2,403,231	
200 Benefits				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
210 URS Pension & 401k	\$ 469,508	\$ 433,595	\$ 410,259	
220 Social Security & Medicare Employer Match	\$ 167,790	\$ 176,350	\$ 180,242	7.50%
241 Health Insurance	\$ 218,720	\$ 239,476	\$ 253,463	
241 H.S.A. Employer Contributions	\$ 19,750	\$ 24,000	\$ 24,000	
270 Worker's Compensation Fund	\$ 5,313	\$ 11,000	\$ 12,000	
280 Unemployment Insurance	\$ 656	\$ 7,000	\$ 5,000	
Total 200:	\$ 881,737	\$ 891,421	\$ 884,964	
300 Prof & Technical Services				
310 Educational Services	\$ 646	\$ -		
310 Substitutes (Sub Services)	\$ 3,023	\$ 12,000	\$ 8,000	
320 Support Services (Orion)	\$ 75,614	\$ 84,000	\$ 90,000	Need to work with Jacque
321 Support Services (Not Orion)	\$ 864	\$ 2,000	\$ 2,000	
330 Employee Training & Development	\$ 1,029	\$ 35,000	\$ 20,000	Needs to include all Grants, RDA etc...
340 Audit Services	\$ 12,800	\$ 16,000	\$ 17,000	
340 Admin / Business Services / IT from Summit	\$ 58,000	\$ 97,870	\$ 99,743	Per Schedule
349 Legal Services	\$ 4,525	\$ 15,000	\$ 12,000	
355 Technical Services (IT) (Not Tanner)	\$ 7,859	\$ 2,000	\$ 500	
Total 300:	\$ 164,360	\$ 263,870	\$ 249,243	
400 Purchased Property Services				
410 Water / Sewage / Garbage	\$ 10,261	\$ 21,500	\$ 18,000	
430 Repairs / Maintenance / Monitoring	\$ 53,689	\$ 35,000	\$ 45,000	
431 Kitchen Maintenance & Repairs	\$ 1,218	\$ 1,000	\$ 2,500	
435 Lawn Care & Snow Removal	\$ 20,603	\$ 22,000	\$ 24,000	
440 Lease of Copy Machines (RicoH)	\$ 10,932	\$ 16,500	\$ 16,500	
Total 400:	\$ 96,703	\$ 96,000	\$ 106,000	
500 Other Purchased Services				
511 Daily Busing to/from Campuses	\$ 25,000	\$ 25,000	\$ 25,000	
513 Travel-Field Trips	\$ 8	\$ 1,000	\$ 1,000	
517 Travel-Extracurricular (Athletics and Non)	\$ -	\$ 4,000	\$ 4,000	
518 Travel-Athletics	\$ 9,141	\$ 15,000	\$ 30,000	



High School

Budget Detail Report

	(542 Students)	(505 Students)	(550 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
520 Property / Liability / Non employee insurances	\$ 51,825	\$ 70,000	\$ 130,000	
530 Communication	\$ 11,322	\$ 10,500	\$ 11,000	
540 Marketing	\$ 34	\$ 10,000	\$ 3,000	
570 Food Services Management (Summit)	\$ 2,482	\$ 50,000	\$ 60,000	
580 Travel (Staff)	\$ 1,433	\$ 4,000	\$ 7,000	
591 Athletics - Services	\$ 81,383	\$ 70,000	\$ 88,000	
592 Online Courses (including Recovery)		\$ 10,000	\$ -	
593 Student Events / Council (Dances)	\$ 3,000	\$ 6,000	\$ 6,000	
594 Student Activities-General	\$ 4,081	\$ 5,000	\$ 5,000	
595 Debate / Drama / Music Services	\$ 1,989	\$ 4,000	\$ 2,500	
Total 500:	\$ 191,698	\$ 284,500	\$ 372,500	



High School

Budget Detail Report

	(542 Students)	(505 Students)	(550 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
600 Supplies and Materials				
611 General Supplies (includes: Spirit packs, Uniforms)	\$ -	\$ -		
611 Science	\$ 288	\$ 2,000	\$ 5,000	
611 General Supplies / Miscellaneous (Food)	\$ 38,425	\$ 37,000	\$ 30,000	
612 Copies	\$ 2,354	\$ 3,000	\$ 3,000	
612 Art		\$ 4,000	\$ 4,000	
613 Music		\$ 2,000	\$ 4,000	
616 CTE	\$ 1,565	\$ 10,000	\$ 20,000	
617 Math	\$ 775	\$ 2,000	\$ 2,000	
611 Physical Education	\$ 600	\$ 500	\$ 1,000	
610 Athletic Supplies / Uniforms	\$ 144,485	\$ 90,000	\$ 90,000	
610 Spirit Packs	\$ 3,258	\$ 16,000	\$ 16,000	
610 Student Council	\$ 500	\$ 4,000	\$ 8,000	
611 Drama	\$ 235	\$ 2,500	\$ 2,500	
615 Dance		\$ 2,500	\$ 2,500	
616 Debate	\$ 172	\$ 1,500	\$ 1,500	
617 National Honor Society (NHS)	\$ 770	\$ 1,000	\$ 1,000	
610 Extracurricular / Athletics Supplies-General	\$ 1,750	\$ 3,000	\$ 1,500	
611 Support Service Materials (SpEd)	\$ -	\$ -		
612 Office Supplies	\$ 4,950	\$ 4,500	\$ 5,000	
613 Yearbooks	\$ 4,452	\$ 15,000	\$ 13,000	
614 CCGP Counseling	\$ 687	\$ 5,000	\$ 5,000	
614 Teacher Training & Appreciation	\$ 1,553	\$ 5,000	\$ 6,000	
621 Natural Gas	\$ 14,331	\$ 16,500	\$ 16,500	
622 Electricity	\$ 97,030	\$ 77,000	\$ 80,000	
632 Food Program (non-food supplies)	\$ 51,914	\$ 25,000	\$ 25,000	
641 Curriculum	\$ 42,744	\$ 70,000	\$ 58,000	Land Trust, AP Calc
644 Library	\$ -	\$ 700	\$ 1,000	
650 Tech Supplies (Under \$500)	\$ 53,896	\$ 150,000	\$ 130,000	DTL
670 Educational Software	\$ 20,129	\$ 4,500	\$ 4,000	
670 Central Services Software (Payroll, Firefly, Blackboard)	\$ 260	\$ 13,000	\$ 13,000	
680 Maintenance & Cleaning Supplies	\$ 22,085	\$ 20,000	\$ 15,000	
Total 600:	\$ 509,208	\$ 587,200	\$ 563,500	
700 Property, Equipment				
731 Facility		\$ 25,000	\$ 300,000	
732 School Buses	\$ 70	\$ 35,000	\$ -	
733 Furniture		\$ 25,000	\$ -	
734 Technology-Related Hardware		\$ 6,500		
738 Kitchen Equipment	\$ -	\$ 17,000		
Total 700:	\$ 70	\$ 83,500	\$ 300,000	
800 Debt Service and Misc				
810 Dues and Fees	\$ 2,416	\$ 2,850	\$ 3,000	
812 Bank Fees		\$ 6,585	\$ 1,000	
834 Interest	\$ 787,626	\$ 819,701	\$ 747,663	Bond, Loan, Musco
840 Principal	\$ 481,680	\$ 450,616	\$ 607,646	Bond, Loan, Musco
840 Loan Repayment to Summit Incorporated	\$ -	\$ 65,849	\$ 66,000	Included above
850 Carry Over (Prior Year)		\$ 10,000	\$ 90,000	Includes ALL Sports as well
870 Economic Set Aside			\$ 300,000	Also includes potential mid year reduction as I believe we will go back down in enrollment
890 Miscellaneous	\$ 3,500	\$ 3,500	\$ 3,000	Includes Placeholder for ESSER III



High School

Budget Detail Report

	(542 Students)	(505) Students)	(550) Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
Total 800:	\$ 1,275,222	\$ 1,359,101	\$ 1,818,309	
Total Expenses:	\$ 5,554,051	\$ 5,870,819	\$ 6,697,747	
Net Income:			\$ 403,426	
			\$ 213,035	3% of Revenues (Minimum)



Draper

0.372

Budget Detail Report

Revenue

	(940 Students)	(780 Students)	(767 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Proposed Adopted Budget	
1000 Local				
1600 Food Sales	\$ 7,424	\$ 2,000	2,000	
1710 Student Activities (Admissions, Store, Std Org Memb)	\$ 6,751	\$ 14,360	\$ 8,000	
1740 Fees (includes Spirit Packs)	\$ 45,283	\$ 50,000	\$ 75,000	
1770 Fundraisers	\$ 22,021	\$ 20,000	\$ 20,000	
1910 Rentals	\$ 13,486	\$ 10,000	\$ 20,000	
1920 Contributions / Donations	\$ 3,863	\$ 5,000	\$ 5,000	
1930 Gain / Loss on Sale of Assets		\$ 1,250	\$ 1,200	
1950 Revenue from Other Schools (High School)				
1990 Miscellaneous	\$ 8,744	\$ 7,500	\$ 9,000	
Total 1000:	\$ 107,572	\$ 108,110	\$ 140,200	
3000 State				
3010 Regular School Prgm K-12	\$ 2,881,207	\$ 2,676,321	\$ 2,616,654	
3100 ADK Grant			\$ 32,000	
3520 School Land Trust	\$ 111,378	\$ 101,058	\$ 101,814	
3655 DTL		\$ 98,000	\$ 38,850	
3100 CCGP		\$ 20,000	\$ 20,000	
3500 Counseling	\$ 10,000	\$ 50,000	\$ 50,000	
3700 CCA	\$ 45,655	\$ 5,371	\$ 5,300	
3000 Share of SPED State Funding	\$ 96,772	\$ 454,182	\$ 626,154	
3000 Share of state funding	\$ 3,598,764	\$ 3,390,626	\$ 3,480,771	
Total 3000:	\$ 6,743,776	\$ 6,795,558	\$ 6,971,542	
4000 Federal- Comes in later in the year, Reimbursement				
4700 CARES Funding (GEERS, CARES)	\$ 63,873	\$ 107,183.00	\$ 135,780.00	
4801 Title I	\$ 11,643	\$ 11,600.00	\$ 11,600.00	
4000 Share of SPED IDEA Funding		\$ 62,500.00	\$ 62,500.00	
4522 Share of federal funding	\$ 129,005	\$ 10,014	\$ 23,882	
Total 4000:	\$ 204,521	\$ 191,297	\$ 233,762	
Total Revenue:	\$ 7,055,869	\$ 7,094,965	\$ 7,345,505	

Expenses

100 Salaries				
115.00 Supervisors/Instructional Coaches	\$ 37,715			
121.00 Principals & Assistants	\$ 110,770	\$ 155,300	\$ 159,959	
131.00 Teachers	\$ 2,277,245	\$ 1,966,398	\$ 2,059,107	
131.50 SPED Teachers		\$ 211,067	\$ 250,689	
132.00 Substitutes	\$ 69,111	\$ 48,000	\$ 50,000	
133.00 Support Services Salaries	\$ 25,037	\$ 25,000	\$ 25,000	
134.00 Educational Stipends	\$ 93,894	\$ 30,000	\$ 55,000	
134.00 Coaching Stipends	\$ 5,000	\$ 4,000	\$ 6,000	



Draper

0.372

Budget Detail Report

	(940 Students)	(780 Students)	(767 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Proposed Adopted Budget	
142.00 Guidance Counselors	\$ 84,280	\$ 109,350	\$ 115,360	
145.00 Librarians	\$ 8,918	\$ 16,500	\$ 17,000	
152.00 Office Staff	\$ 97,578	\$ 97,600	\$ 105,303	
152.00 Special Education / CCGP Secretaries	\$ 5,574	\$ 300	\$ 1,000	
161.00 Classroom Paraprofessionals	\$ 230,533	\$ 328,322	\$ 376,738	\$100,000 FOR esser III- \$50,000 this year
161.10 Special Education Paraprofessionals	\$ 58,587	\$ 96,619	\$ 170,604	
182.00 Custodial / Maintenance Personnel	\$ 60,209	\$ 69,959	\$ 65,000	
Total 100:	\$ 3,164,451	\$ 3,158,415	\$ 3,456,760	
200 Benefits				
210.00 URS Pension & 401k employer contributions	\$ 612,384	\$ 581,000	\$ 532,375	
220.00 Social Security & Medicare ER Match	\$ 219,579	\$ 241,619	\$ 251,830	
241.00 Health Insurance	\$ 254,865	\$ 262,500	\$ 310,652	
290.00 Health Savings Account (Employer)	\$ 22,339	\$ 29,500	\$ 30,000	
270.00 Worker's Compensation Fund		\$ 8,500	\$ 8,500	
280.00 Unemployment Insurance	\$ 1,654			
Total 200:	\$ 1,110,821	\$ 1,123,119	\$ 1,133,357	
300 Prof & Technical Services				
310.00 Professional Educational Services	\$ 919	\$ 5,000	\$ 2,000	
320.00 Substitutes (Sub Services)	\$ 53,821	\$ 25,000	\$ 32,000	NEED TO ADD \$7,000 FOR LETRS
321.00 Support Services (Orion)	\$ 151,452	\$ 206,000	\$ 234,767	Jacque
323.00 Support Services (Not Orion)	\$ 21,918	\$ 32,500	\$ 30,000	Jacque
330.00 Employee Training & Development	\$ 5,951	\$ 31,666	\$ 18,000	
355.00 Technical Services (Blackboard/Acuity/etc)	\$ 1,330	\$ 1,500	\$ 1,500	
Total 300:	\$ 235,391	\$ 301,666	\$ 318,267	
400 Purchased Property Services				
410.00 Water / Sewage / Garbage	\$ 25,572	\$ 24,450	\$ 27,000	
420.00 Cleaning Services (Vanguard Cleaning Sys of Utah)	\$ 70,755	\$ 74,000	\$ 75,000	
431.00 Repairs / Maintenance / Monitoring	\$ 37,986	\$ 110,000	\$ 80,000	Alysha
435.00 Lawn Care & Snow Removal	\$ 30,695	\$ 42,400	\$ 40,000	
443.00 Lease of Copy Machines & Rental of mail machine	\$ 28,471	\$ 45,000	\$ 30,000	
Total 400:	\$ 193,479	\$ 295,850	\$ 252,000	
500 Other Purchased Services				
530.00 Communication	\$ 14,775	\$ 13,000	\$ 14,000	
540.00 Marketing	\$ 479	\$ 10,000	\$ 2,000	Michael?
580.00 Travel	\$ 52	\$ 3,000	\$ 3,000	
591.00 Ativities / Student Council	\$ 1,284	\$ 3,500	\$ 3,000	
592.00 Athletics	\$ 3,150	\$ 5,800	\$ 1,000	
593.00 SPO Services purchased	\$ 22			
Total 500:	\$ 19,762	\$ 35,300	\$ 23,000	
600 Supplies and Materials				
610.00 General Educational Supplies	\$ 65,699	\$ 50,000	\$ 50,000	
613.00 Drama	\$ 654	\$ 1,200	\$ 1,200	
619.00 Athletics / Spirit Packs	\$ 3,691	\$ 4,000	\$ 5,000	



Draper

0.372

Budget Detail Report

	(940 Students)	(780 Students)	(767 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Proposed Adopted Budget	
620.00 Student Council Materials	\$ 1,286	\$ 2,000	\$ 1,500	
612.00 Copy Paper	\$ 7,372	\$ 10,000	\$ 8,000	
612.10 Office Supplies / Postage	\$ 7,786	\$ 10,000	\$ 8,000	
618.00 Support Services Materials	\$ 2,322	\$ 10,000	\$ 8,000	
618.10 CCGP (Counseling)	\$ 9,137	\$ 12,000	\$ 12,000	
619.00 Training & Appreciation	\$ 3,162	\$ 4,000	\$ 3,500	
620.10 SPO Materials purchased	\$ 3,285	\$ 30,000	\$ 30,000	
621.00 Natural Gas	\$ 25,196	\$ 22,000	\$ 23,000	
622.00 Electricity	\$ 88,975	\$ 74,500	\$ 90,000	
641.00 Curriculum	\$ 33,639	\$ 89,000	\$ 80,000	
644.00 Library	\$ 1,029	\$ 2,000	\$ 1,000	
650.00 Tech Supplies (Under \$500)	\$ 116,961	\$ 53,279	\$ 45,000	Need to add \$4,000 for ESSER III, \$3,000 for Title IV
670.00 Software	\$ 27,198	\$ 55,000	\$ 15,000	
680.00 Maintenance & Cleaning Supplies	\$ 42,387	\$ 41,000	\$ 40,000	
Total 600:	\$ 439,779	\$ 469,979	\$ 421,200	
700 Property, Equipment				
710.00 Land & Site Improvements		\$ 94,000		
733.00 Furniture		\$ -	\$ -	
734.00 Technology-Related Hardware & Software	\$ -	\$ -	\$ -	
739.00 Facility Equipment		\$ -	\$ -	
Total 700:	\$ -	\$ 94,000	\$ -	
800 Debt Service and Misc				
810.00 Dues & Fees	\$ 5,767	\$ 7,000	\$ 6,000	
830.00 Interest (Series 2019 Bonds)	\$ 582,800	\$ 550,425	\$ 539,300	
840.00 Principal (Series 2019 Bonds)	\$ 425,000	\$ 445,000	\$ 475,000	
844.00 Series 2019 Bonds - Moral Ob ins, rating, Trustee fee	\$ 359	\$ 25,000	\$ 20,000	
850.00 Carry Over		\$ 20,000	\$ 22,500	Not Ready Yet
899.00 Share of District Level costs	\$ 393,681	\$ 525,000	\$ 591,525	Place Holder
Total 800:	\$ 1,407,607	\$ 1,572,425	\$ 1,654,325	
Total Expenses:	\$ 6,571,290	\$ 7,050,754	\$ 7,258,909	
Net Income:	\$ 484,579	\$ 44,211	\$ 86,596	
Min Goal		\$ 212,849	\$ 220,365	3% of Revenues (Minimum)



Independence

0.411

Budget Detail Report

Revenue

	(972 Students)	(875 Students)	(848 Students)	
	FY21 Final Actuals	FY22 Revised Budget	FY23 Adopted Budget	
1000 Local				
1710 Student Activities (Admissions, Store, Std Org Memb)	\$ 20,547	\$ 2,200	\$ 16,000	
1740 Fees (includes Spirit Packs)	\$ 42,770	\$ 40,000	\$ 42,000	
1770 Fundraisers	\$ 27,323	\$ 32,000	\$ 27,000	
1910 Rentals	\$ 26,193	\$ 25,000	\$ 26,000	
1920 Contributions / Donations	\$ 7,461	\$ 6,000	\$ 7,000	
1930 Gain / Loss on Sale of Assets	\$ -	\$ -		
1950 Revenue from Other Schools (High School)	\$ -	\$ -		
1990 Miscellaneous	\$ 437	\$ -		
Total 1000:	\$ 124,731	\$ 105,200	\$ 118,000	
3000 State				
3010 Regular School Prgm K-12	\$ 3,014,186	\$ 3,052,686	\$ 2,890,981	
3100 ADK Grant			\$ 64,000	2 Classes
3200 COVID	\$ 96,772	\$ 121,378		
3520 School Land Trust	\$ 121,378	\$ 124,432	\$ 124,432	
3655 DTL	\$ 20,423	\$ 31,334	\$ 84,100	Includes \$40,000 rotation money
3100 CCGP		\$ 20,000	\$ 20,000	
3500 Counseling Grant		\$ 50,000	\$ 50,000	Are we getting again?
3700 CCA		\$ 6,015	\$ 6,015	
3637 Dual Immersion	\$ 6,666	\$ 5,000	\$ 5,000	
3000 Share of SPED State Funding		\$ 751,292	\$ 684,776	
3000 Share of state funding	\$ 3,764,860	\$ 3,547,116	\$ 3,845,690	
Total 3000:	\$ 7,024,285	\$ 7,709,253	\$ 7,774,994	
4000 Federal				
4700 CARES Funding (GEERS, CARES)	\$ -	\$ 90,554.14	\$ 150,015.00	Includes ESSER II
4801 Title I		\$ 20,423.00	\$ 20,400.00	
4500 Share of SPED IDEA			\$ 100,000.00	
4522 Share of federal funding	\$ -	\$ 134,959	\$ 26,386	Only Includes Title II, N Includes Title II Only
Total 4000:	\$ -	\$ 245,936	\$ 296,801	
Total Revenue:	\$ 7,149,016	\$ 8,060,389	\$ 8,189,795	

Expenses

100 Salaries				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
115.00 Supervisors & Directors	\$ 901	\$ -	\$ -	
121.00 Principals & Assistants	\$ 172,224	\$ 170,000	\$ 165,205	
131.00 Teachers (Includes CCGS)	\$ 2,417,243	\$ 2,163,887	\$ 2,280,978	
131.50 SPED Teachers		\$ 213,878	\$ 208,968	
132.00 Substitutes	\$ 21,889	\$ 28,515	\$ 50,000	
133.00 Support Services Salaries	\$ 2,840	\$ 50,000	\$ 25,000	
134.00 Coaching Stipends	\$ 4,950	\$ 6,500	\$ 6,500	
134.00 Educational Stipends	\$ 82,866	\$ 30,000	\$ 65,000	
142.00 Guidance Counselor & Social Worker	\$ 133,634	\$ 173,550	\$ 182,382	
145.00 Librarians	\$ 11,247	\$ 10,584	\$ 13,543	
152.00 Office Staff	\$ 90,213	\$ 75,000	\$ 92,044	



Independence

0.411

Budget Detail Report

	(972 Students)	(875 Students)	(848 Students)	
	FY21 Final Actuals	FY22 Revised Budget	FY23 Adopted Budget	
152.00 Special Education / CCGP Secretaries	\$ 4,970	\$ 500	\$ 2,321	
161.00 Classroom Paraprofessionals	\$ 297,344	\$ 318,555	\$ 403,688	\$100,000 FOR ESSER III- \$50,000 This year
161.00 Special Education Paraprofessionals	\$ 134,270	\$ 180,000	\$ 142,618	
182.00 Custodial / Maintenance Personnel	\$ 107,543	\$ 122,000	\$ 140,897	
Total 100:	\$ 3,482,134	\$ 3,542,969	\$ 3,779,144	
200 Benefits				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
210.00 URS Pension & 401k employer contributions	\$ 649,245	\$ 651,000	\$ 584,038	
220.00 Social Security & Medicare ER Match	\$ 235,974	\$ 271,022	\$ 274,021	
241.00 Health Insurance	\$ 265,200	\$ 340,280	\$ 374,602	
290.00 Health Savings Account (Employer)	\$ 20,384	\$ 22,000	\$ 24,000	
270.00 Worker's Compensation Fund		\$ 6,000	\$ 7,000	
280.00 Unemployment Insurance	\$ -	\$ -	\$ -	
Total 200:	\$ 1,170,803	\$ 1,290,302	\$ 1,263,661	
300 Prof & Technical Services				
310.00 Professional Educational Services	\$ 2,383	\$ 1,500		
320.00 Substitutes (Sub Services)	\$ 49,346	\$ 34,000	\$ 30,000	NEED TO ADD \$7,000 FOR LETRS
321.00 Support Services (Orion)	\$ 218,882	\$ 246,000	\$ 260,863	
323.00 Support Services (Not Orion)	\$ 28,728	\$ 35,000	\$ 35,000	
330.00 Employee Training & Development	\$ 8,749	\$ 21,666	\$ 5,000	
Total 300:	\$ 308,088	\$ 338,166	\$ 330,863	
400 Purchased Property Services				
410.00 Water / Sewage / Garbage	\$ 10,546	\$ 15,000	\$ 10,000	
420.00 Cleaning Services (Vanguard Cleaning Sys of Utah)	\$ 180	\$ -		
431.00 Repairs / Maintenance / Monitoring	\$ 28,472	\$ 50,000	\$ 55,000	
435.00 Lawn Care & Snow Removal	\$ 15,668	\$ 19,000	\$ 16,000	
443.00 Lease of Copy Machines & rental of mail machine	\$ 21,650	\$ 28,000	\$ 22,000	
Total 400:	\$ 76,516	\$ 112,000	\$ 103,000	
500 Other Purchased Services				
530.00 Communication	\$ 3,994	\$ 5,200	\$ 4,000	
540.00 Marketing	\$ 1,731	\$ 10,000	\$ 4,000	
580.00 Travel		\$ 800	\$ 800	
591.00 Ativities / Student Council	\$ 348	\$ 3,100	\$ 3,500	
592.00 Athletics	\$ 3,887	\$ 5,500	\$ 5,800	
593.00 SPO Services purchased		\$ 3,000	\$ 4,200	
599.00 Teacher Recruitment	\$ -	\$ -	\$ 5,000	
Total 500:	\$ 9,960	\$ 27,600	\$ 27,300	
600 Supplies and Materials				
610.00 General Educational Supplies	\$ 60,552	\$ 43,400	\$ 57,000	
613.00 Drama	\$ 2,432	\$ 2,000	\$ 2,000	
619.21 Athletics / Spirit Packs	\$ 5,868	\$ 5,500	\$ 4,000	
619.22 Student Council Materials	\$ 2,567	\$ 2,000	\$ 3,500	
612.10 Copy Paper	\$ 7,144	\$ 9,000	\$ 8,000	
612.00 Office Supplies / Postage	\$ 8,964	\$ 12,000	\$ 10,000	
618.21 Support Services Materials	\$ 3,425	\$ 13,000	\$ 10,000	
618.00 CCGP (Counseling)	\$ 1,967	\$ 12,000	\$ 9,600	
619.00 Training & Appreciation	\$ 2,412	\$ 8,000	\$ 6,500	
620.00 SPO Materials purchased	\$ 11,525	\$ 11,000		



Independence

0.411

Budget Detail Report

	(972 Students)	(875 Students)	(848 Students)	
	FY21 Final Actuals	FY22 Revised Budget	FY23 Adopted Budget	
621.26 Natural Gas	\$ 13,591	\$ 12,500	\$ 13,000	
622.26 Electricity	\$ 42,468	\$ 55,000	\$ 55,000	
641.10 Curriculum	\$ 88,684	\$ 50,000	\$ 33,000	Dual, LT, GEN
644.00 Library	\$ 1,433	\$ 1,000	\$ 1,000	
650.00 Tech Supplies	\$ 91,150	\$ 36,334	\$ 91,100	Need to add \$4,000 for ESSER III, \$3,000 for Title IV
670.00 Software	\$ 13,531	\$ 36,500	\$ 11,000	
680.00 Maintenance & Cleaning Supplies	\$ 33,687	\$ 36,000	\$ 36,000	
<i>Total 600:</i>	<i>\$ 391,400</i>	<i>\$ 345,234</i>	<i>\$ 350,700</i>	
700 Property, Equipment				
710.00 Land & Site Improvements				
720.00 Buildings				
733.00 Furniture		\$ -	\$ -	
734.00 Technology-Related Hardware & Software	\$ 8,106		\$ 50,000	
739.00 Facility Equipment		\$ 7,500		
<i>Total 700:</i>	<i>\$ 8,106</i>	<i>\$ 7,500</i>	<i>\$ 50,000</i>	
800 Debt Service and Misc				
810.00 Dues & Fees	\$ 5,244	\$ 10,000	\$ 10,000	
830.00 Interest (Series 2019 Bonds)	\$ 706,475	\$ 838,950	\$ 824,200	
840.00 Principal (Series 2019 Bonds)	\$ 280,000	\$ 295,000	\$ 310,000	
844.00 Series 2019 Bonds - Moral Ob ins, rating, Trustee fee		\$ 35,000	\$ 30,000	
850 Carry Over		\$ 26,000	\$ 40,000	Not Ready Yet
899.00 Share of District Level costs	\$ 413,870	\$ 700,000	\$ 653,539	PLACE HOLDER
<i>Total 800:</i>	<i>\$ 1,405,589</i>	<i>\$ 1,904,950</i>	<i>\$ 1,867,739</i>	
<i>Total Expenses:</i>	<i>\$ 6,852,596</i>	<i>\$ 7,568,721</i>	<i>\$ 7,772,407</i>	
<i>Net Income:</i>	<i>\$ 296,420</i>	<i>\$ 491,668</i>	<i>\$ 417,388</i>	This helps support Bluff, LEA
		<i>\$ 241,812</i>	<i>\$ 245,694</i>	3% of Revenues (Minimum)



Bluffdale

0.21

Budget Detail Report

Revenue

	(500 Students)	(425 Students)	(450 Students)	
	FY21 Actuals	FY22 Forecast	FY23 Adopted Budget	
1000 Local				
1710 Student Activities (Admissions, Store, Std Org Memb)	\$ 6,839			
1740 Fees (includes Spirit Packs)	\$ 10	\$ -		
1770 Fundraisers	\$ 1,966	\$ 35,000	\$ 29,000	Whatever Fundraisers you plan to have
1910 Rentals	\$ 3,875	\$ 6,500	\$ 1,000	Building Rentals
1920 Contributions / Donations	\$ 3,294	\$ 3,000	\$ 2,000	Pizza Party Donations, 5th Grade Contribution, Raffle, Lifetouch, Kroger
1930 Gain / Loss on Sale of Assets		\$ -		
1950 Revenue from Other Schools (High School)	\$ -	\$ -		
1990 Miscellaneous	\$ 15	\$ -		
Total 1000:	\$ 15,999	\$ 44,500	\$ 32,000	
3000 State				
3010 Regular School Prgm K-12	\$ 1,470,155	\$ 1,380,977	\$ 1,477,143	
3100 ADK Grant			\$ 32,000	1 Class
3520 School Land Trust	\$ 83,190	\$ 63,191	\$ 63,191	
3400 Dual Immersion	\$ -	\$ 10,000	\$ 10,000	Spanish
3655 DTL	\$ 20,130	\$ 15,666	\$ 22,050	
3000 Share of SPED Funding	\$ 65,805	\$ 652,256	\$ 615,816	Less 1/3 LEA Costs
3000 Share of state funding	\$ 1,809,572	\$ 1,730,088	\$ 1,964,951	
Total 3000:	\$ 3,448,852	\$ 3,852,178	\$ 4,185,151	
4000 Federal				
4801 Title I	\$ 14,139	\$ 14,100	\$ 14,100.00	
4700 CARES		\$ 74,835	\$ 76,650.00	Includes ESSER II
4500 Share of SPED IDEA		\$ 87,500	\$ 87,500.00	
4522 Share of federal funding	\$ -	\$ 5,288	\$ 13,482	
Total 4000:	\$ -	\$ 181,723	\$ 191,732	
Total Revenue:	\$ 3,464,851	\$ 4,078,401	\$ 4,408,883	

Expenses

100 Salaries				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
115.00 Supervisors & Directors	\$ 901	\$ -		
121.00 Principals & Assistants	\$ 154,536	\$ 177,744	\$ 172,795	
131.00 Teachers	\$ 1,210,205	\$ 970,252	\$ 1,010,743	
131.50 SPED Teachers		\$ 154,219	\$ 223,521	
132.00 Substitutes	\$ 15,673	\$ 24,986	\$ 20,000	
133.00 Support Services Salaries	\$ 6,975	\$ 25,000	\$ 20,000	



Bluffdale

0.21

Budget Detail Report

	(500 Students)	(425 Students)	(450 Students)	
	FY21 Actuals	FY22 Forecast	FY23 Adopted Budget	
134.00 Coaching Stipends	\$ -	\$ 500	\$ -	
134.00 Educational Stipends	\$ 47,826	\$ 25,000	\$ 25,000	
142.00 Guidance Counselors & Social Worker	\$ 24,904	\$ 30,000	\$ 32,528	
143.00 Nurse	\$ -	\$ -		
145.00 Librarians	\$ 7,794	\$ 7,678	\$ 8,000	
152.00 Office Staff	\$ 46,622	\$ 55,335	\$ 71,458	
152.00 Special Education / CCGP Secretaries		\$ 4,290	\$ 4,000	
161.00 Classroom Paraprofessionals	\$ 241,623	\$ 281,740	\$ 263,168	General/TSSA- \$100,000 ESSER III- \$50,000 This year
161.00 Special Education Paraprofessionals	\$ 176,421	\$ 120,310	\$ 142,185	
182.00 Custodial / Maintenance Personnel	\$ 45,315	\$ 54,487	\$ 40,000	Includes Building Supervision
Total 100:	\$ 1,978,795	\$ 1,931,541	\$ 2,033,398	
200 Benefits				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
210.00 URS Pension & 401k employer contributions	\$ 329,065	\$ 291,000	\$ 286,157	
220.00 Social Security & Medicare ER Match	\$ 146,413	\$ 147,763	\$ 141,637	
241.00 Health Insurance	\$ 129,193	\$ 126,139	\$ 152,258	
290.00 Health Savings Account (Employer)	\$ 10,538	\$ 13,500	\$ 15,000	
270.00 Worker's Compensation Fund	\$ -	\$ 6,800	\$ 7,000	
280.00 Unemployment Insurance	\$ -	\$ -		
Total 200:	\$ 615,209	\$ 585,202	\$ 602,052	
300 Prof & Technical Services				
310.00 Professional Educational Services	\$ 1,090	\$ 500	\$ 500	
320.00 Substitutes (Sub Services)	\$ 17,594	\$ 25,000	\$ 32,000	Professional Staffing, NEED TO ADD \$7,000 FOR LETRS
321.00 Support Services (Orion)	\$ 205,214	\$ 206,000	\$ 178,807	
323.00 Support Services (Not Orion)	\$ 21,971	\$ 42,000	\$ 40,000	
330.00 Employee Training & Development	\$ 3,621	\$ 30,166	\$ 12,000	Trainings, PD
Total 300:	\$ 249,490	\$ 303,666	\$ 263,307	
400 Purchased Property Services				
410.00 Water / Sewage / Garbage	\$ 28,554	\$ 36,000	\$ 36,000	
420.00 Cleaning Services (Vanguard Cleaning Sys of Utah)	\$ 34,811	\$ 35,525	\$ 37,000	
431.00 Repairs / Maintenance / Monitoring	\$ 15,935	\$ 25,000	\$ 20,000	Repairs/Maintenance around campus Alysha can support if stuck
435.00 Lawn Care & Snow Removal	\$ 21,669	\$ 21,500	\$ 21,500	
443.00 Lease of Copy Machines & rental of mail machine	\$ 15,175	\$ 19,000	\$ 19,000	
Total 400:	\$ 116,144	\$ 137,025	\$ 133,500	
500 Other Purchased Services				
530.00 Communication	\$ 3,164	\$ 8,000	\$ 8,500	
540.00 Marketing	\$ 1,679	\$ 10,000	\$ 2,000	
580.00 Travel		\$ 1,000	\$ 1,000	Mileage/Fuel
591.00 Ativities / Student Council	\$ 388	\$ 300		This is student realted activities



Bluffdale

0.21

Budget Detail Report

	(500 Students)	(425 Students)	(450 Students)	
	FY21 Actuals	FY22 Forecast	FY23 Adopted Budget	
592.00 Athletics	\$ -	\$ -		
593.00 SPO Services purchased				SPO Services only (Outside companies)
Total 500:	\$ 5,231	\$ 19,300	\$ 11,500	
600 Supplies and Materials				
610.00 General Educational Supplies	\$ 30,704	\$ 30,000	\$ 30,000	General Supplies- Teachers pay teachers, amazon, wal mart, food, TEAM mc
612.00 Copy Paper	\$ 4,285	\$ 4,500	\$ 5,000	
612.00 Office Supplies / Postage	\$ 2,481	\$ 5,000	\$ 5,000	Supplies for staff in the offices
618.00 Support Services Materials	\$ 1,900	\$ 11,500	\$ 10,000	SPED Supports- I would keep the same
619.00 Training & Appreciation	\$ 1,347	\$ 4,000	\$ 4,000	Staff appreciation- Foods, Cookies, Flowers (Should be minimal)
619.00 SPO Materials purchased	\$ 4,223	\$ 12,000	\$ 17,000	SPO Supplies and Materials
621.00 Natural Gas	\$ 7,234	\$ 9,500	\$ 9,500	
622.00 Electricity	\$ 29,841	\$ 29,500	\$ 30,000	
641.00 Curriculum	\$ 59,827	\$ 50,000	\$ 30,000	All Curriculum needs for ALL programs
644.00 Library	\$ 1,821	\$ 1,000	\$ 1,000	
650.00 Tech Supplies (Under \$500)	\$ 101,529	\$ 50,000	\$ 20,000	Need to add \$4,000 for ESSER III, \$3,000 for Title IV
670.00 Software	\$ 13,962	\$ 35,000	\$ 10,000	Educational and Staff Software
680.00 Maintenance & Cleaning Supplies	\$ 17,800	\$ 25,000	\$ 25,000	Cleaning Supplies
Total 600:	\$ 276,954	\$ 267,000	\$ 196,500	
700 Property, Equipment				
710.00 Land & Site Improvements	\$ 8,394	\$ 5,000		These would be facility upgares that are individually over \$5k EACH
733.00 Furniture	\$ -	\$ -	\$ -	
734.00 Technology-Related Hardware & Software	\$ -	\$ -	\$ -	
739.00 Facility Equipment	\$ -	\$ -	\$ -	
Total 700:	\$ 8,394	\$ 5,000	\$ -	
800 Debt Service and Misc				
810.00 Dues & Fees	\$ 2,550	\$ 4,450	\$ 4,000	
830.00 Interest (Series 2019 Bonds)	\$ 525,000	\$ 516,250	\$ 507,250	
840.00 Principal (Series 2019 Bonds)	\$ 175,000	\$ 180,000	\$ 190,000	
844.00 Series 2019 Bonds - Moral Ob ins, rating, Trustee fee	\$ -	\$ 25,000	\$ 20,000	
850 Carry Over		\$ 15,000	\$ 12,000	Not Ready Yet
899.00 Share of District Level costs	\$ 201,888	\$ 367,489	\$ 339,925	Place Holder
Total 800:	\$ 904,438	\$ 1,108,189	\$ 1,073,175	
Total Expenses:	\$ 4,154,655	\$ 4,356,923	\$ 4,313,432	
Net Income:	\$ (689,804)	\$ (278,522)	\$ 95,451	
		\$ 122,352	\$ 132,267	3% of Revenues (Minimum)



LEA

Budget Detail Report

Revenue

	(0 Students)	(0 Students)	(0 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
1000 Local				
1420 Transportation Fees from High School	\$ 18,750	\$ 25,000	\$ 25,000	
1510 Interest (PTIF & Bonds)	\$ 40,106	\$ 60,000	\$ 60,000	
1600 Lunch Program (Family payments)	\$ 60,784	\$ 5,000	\$ 2,000	
1910 Rentals	\$ 58,936	\$ 45,000	\$ 45,000	
1920 Contributions / Donations	\$ 1,251	\$ 2,000	\$ 1,000	
1930 Gain / Loss on Sale of Assets		\$ -		
1950 Revenue from Other Schools (High School, Preschool)	\$ 71,592	\$ 106,473	\$ 99,743	
1990 Miscellaneous	\$ 64,479	\$ -	\$ 50,000	
1991 PreSchool Income	\$ 225,804	\$ 966,086	\$ 954,464	
3000 State Revenue/Federal Programs		\$ 2,781,871	\$ 1,018,923	
Share of costs from sites		\$ 1,592,489	\$ 1,584,989	
Informational				
Repayment of Loan from High School				
Total 1000:	\$ 541,702	\$ 5,583,919	\$ 3,841,119	
Total Revenue:	\$ 541,702	\$ 5,583,919	\$ 3,841,119	

Expenses

100 Salaries				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
112.00 Executive Director	\$ 130,000	\$ 133,900	\$ 137,913	
114.00 Business Administrator	\$ 90,000	\$ 101,296	\$ 107,464	
115.00 Special Education Admin staff	\$ -	\$ -	\$ 172,256	
115.00 Programs / Instructional Coaches	\$ 135,309	\$ 332,098	\$ 291,294	
132.00 Substitutes	\$ 15,335	\$ 427,000	\$ 100,000	
131.00 Instructional	\$ 219,577	\$ 30,000	\$ 664,283	Includes Preschool, Summer Program, ESSER II, Endorsement Stipends
134.10 Educational Stipends				LTRS DIVIDED BY CAMPUS
141.00 Attendance	\$ 50,631	\$ 45,212	\$ 46,568	1/2 Hathaway
152.00 Support Services Secretary/Admin Secretary	\$ 40,363	\$ 71,927	\$ 89,106	SPED, Welch
152.00 Board Secretary	\$ 730	\$ 3,000	\$ 3,000	Board
152.00 HR / Accounting	\$ 63,100	\$ 103,000	\$ 135,000	
161.00 Support Services Paraprofessionals	\$ 33,724	\$ 18,000	\$ 20,000	
161.00 Testing Coordinator	\$ 24,807	\$ 60,100	\$ 61,903	
172.00 Bus Drivers	\$ 21,534	\$ 57,783	\$ 70,000	
175.00 Transportation/Safety		\$ 75,695	\$ 78,082	
181.00 Facility Supervisor	\$ 34,937	\$ 55,212	\$ 46,568	
184.00 Technology Wages	\$ 62,952	\$ 117,000	\$ 120,973	
190 Incentives	\$ 59,150	\$ 25,000	\$ 40,000	
191.00 Food Program Supervisors and Personnel	\$ 255,301	\$ 420,000	\$ 544,118	3% COLA
Total 100:	\$ 1,237,450	\$ 2,076,223	\$ 2,728,528	
200 Benefits				For Staffing, Please update STAFFING SHEET, DO NOT FILL THIS SECTION OUT
210.00 URS Pension & 401k employer contributions	\$ 178,990	\$ 290,000	\$ 267,629	
220.00 Social Security & Medicare ER Match	\$ 79,799	\$ 158,831	\$ 120,397	
241.00 Health Insurance	\$ 70,140	\$ 111,300	\$ 130,597	
290.00 Health Savings Account (Employer)	\$ 6,753	\$ 10,500	\$ 11,000	
270.00 Worker's Compensation Fund	\$ 10,325	\$ -		



LEA

Budget Detail Report

	(0 Students)	(0 Students)	(0 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
280.00 Unemployment Insurance	\$ 2,033	\$ 8,000	\$ 10,000	
290.00 PreSchool Benefits	\$ 26,960	\$ 42,500	\$ 104,757	
Total 200:	\$ 375,000	\$ 621,131	\$ 644,380	
300 Prof & Technical Services				
330.00 Employee Training & Development	\$ 10,389	\$ 30,000	\$ 25,000	Charter Conf, Title II
345.00 Business Manager Services	\$ 17,276		\$ 2,000	APR/AFR
349.00 Legal Services	\$ 1,110	\$ 7,500	\$ 5,000	
350.00 Technical Services				Not Needed
352.00 Audit	\$ 16,800	\$ 27,500	\$ 28,000	
Total 300:	\$ 45,575	\$ 65,000	\$ 60,000	
400 Purchased Property Services				
430.00 Repairs & Maintenance	\$ 17,494	\$ 44,000	\$ 30,000	
430.00 Repairs & Maintenance - Lunch Program	\$ 2,480	\$ 19,000	\$ 18,000	
450.00 Construction	\$ 5,254	\$ 2,500	\$ 2,500	
Total 400:	\$ 25,228	\$ 65,500	\$ 50,500	
500 Other Purchased Services				
520.00 General Liability, Property & D & O insurances	\$ 44,711	\$ 63,500	\$ 75,000	
520.00 Bus Insurance		\$ 6,200	\$ 6,200	
530.00 Communication	\$ 6,690	\$ 9,000	\$ 17,000	Phone System
540.00 Marketing (PreSchool)	\$ 2,300	\$ 2,000	\$ 65,000	
542.00 Leadership Retreat and Board Expenses		\$ 3,000	\$ 13,000	
580.00 Travel / Per Diem	\$ 954	\$ 3,500	\$ 3,500	
599.00 Teacher Recruitment		\$ 1,000	\$ 1,500	
Total 500:	\$ 54,655	\$ 88,200	\$ 181,200	
600 Supplies and Materials				
612.00 Office Supplies	\$ 14,363	\$ 20,000	\$ 20,000	
618.00 Support Services Materials	\$ 2,918	\$ 4,000	\$ 3,500	
619.00 Employee Training & Appreciation	\$ 1,821	\$ 2,000	\$ 12,000	
613.00 PreSchool Supplies & Materials	\$ 14,806	\$ 90,050	\$ 128,241	Amber
621.00 Utilities	\$ 22,589			
624.00 Bus Fuel	\$ 5,982	\$ 10,000	\$ 19,000	
630.00 Food Program Supplies	\$ 266,095	\$ 300,000	\$ 350,000	
650.00 Tech Related Hardware	\$ 22,461	\$ 25,000	\$ 75,000	
670.00 Software: QBs / Acuity / Blacboard / Time Clock	\$ 3,064	\$ 50,000	\$ 50,000	Polaris
680.00 Bus Maintenance Supplies	\$ 1,866	\$ 3,500	\$ 5,000	
Total 600:	\$ 355,965	\$ 504,550	\$ 662,741	
700 Property, Equipment				
720.00 Buildings	\$ 3,096	\$ 204,000	\$ 75,000	Carpet/CO2
732.00 Buses/Autos	\$ 2,397	\$ -	\$ 125,000	(2) Buses, (1) w Grant
733.00 Furniture	\$ -	\$ 6,000		
734.00 Technology-Related Hardware & Software	\$ 9,724	\$ 11,000	\$ 40,000	Related to ESSER II
739.00 Kitchen Equipment		\$ 100,000	\$ 100,000	Revised (Spend down plan)
739.00 Facility Equipment		\$ 115,000	\$ 50,000	HVAC
Total 700:	\$ 12,121	\$ 232,000	\$ 390,000	
800 Debt Service and Misc Informational				
810 Dues & Fees/Debt Service	\$ 141,863	\$ 15,000	\$ 15,000	
Total 800:	\$ 141,863	\$ 15,000	\$ 15,000	



Budget Detail Report

	(0 Students)	(0 Students)	(0 Students)	
	FY21 Final Actuals	FY22 Forecast	FY23 Adopted Budget	
Total Expenses:	\$ 2,247,857	\$ 3,667,604	\$ 4,732,349	
Net Income:	\$ (1,706,155)	\$ 1,916,315	\$ (891,230)	
		\$ 167,518	\$ 115,234	

	<u>FY21 Acutals</u>	<u>FY22 Acutals</u>	<u>FY 23 Forecast</u>	<u>Difference</u>
Revenue			\$ 1,022,345	
Expenses				
Payroll			\$ 670,412	
Benefits			\$ 96,591	
Supplies			\$ 150,000	
Other			\$ 41,715	
Transportation			\$ 8,000	
Total	\$ -	\$ -	\$ 966,718	
Balance	\$ -	\$ -	\$ 55,627	

BEGINNING NET ASSETS	\$ 415,000	206,000
Net Income (Decrease)	\$ 55,627	509000
		-300000
PROJECTED ENDING NET ASSETS	<u>\$ 470,627</u>	415,000
165 Days Cash		\$ 55,627
		470,627

REVENUE	\$ 2,750,469.00		DRAPER		BLUFFDALE		INDEP
		Revenue	\$626,154		\$615,816.00		\$684,776.00
EXPENSES	\$ 1,385,841		\$62,500		\$87,500.00		\$ 100,000.00
	\$ 415,752.30		\$688,654		\$703,316.00		\$784,776.00
	\$ 695,000.00	Expenses	\$ 421,293		\$ 369,706		\$ 378,907
	\$ 38,000.00		\$ 264,767		\$ 218,807		\$ 281,000
			\$ 8,000		\$ 10,000		\$ 2,000
	\$ 2,534,593.30		\$ 694,060		\$ 598,513		\$ 661,907
			(\$5,406)		\$104,803.00		\$122,869.00
Carry Forward							

SUMMIT ACADEMY SCHOOLS, INC

Draper

May 19, 2022

TO: Summit Academy Schools, Inc Governing Board

FROM: Brad Wilkinson, Business Administrator

SUBJECT: Approve FY23 Salary Schedules

BACKGROUND INFORMATION

In conjunction with reviewing the FY23 budget, the salary schedules will demonstrate how salaries are based for the budget. Many staff are placed according to this schedule; however there are many hired prior to the establishment of the salary schedules (prior to July 1 , 2021) that are grandfathered off the schedule.

CURRENT CONSIDERATIONS

Review the salary schedules alongside the FY23 budget

IMPACT ON STUDENT ACHIEVEMENT

None

FINANCIAL IMPLICATIONS

Each Step increased by 3%- Based off the increase Summit Academy is proposing for FY23. The starting teacher salary (Step 1) increased by 3%.

RECOMMENDATIONS

It is respectfully requested that the Governing Board consider and approve the adjustments to the FY22 Salary Schedule for Summit Academy, and Summit Academy High School.

DIRECTOR'S RECOMMENDATION: Recommended Approval.



ADMINISTRATORS
2021-22 Salary Schedule

*This schedule is based on legislative increases for 2021-22. The Steps are subject to further review and freezes each fiscal year. The review and potential changes will be based on legislative action, enrollments, and other factors.

** All staff prior to 7/1/2021 will be placed according to current salary in FY21+3%

<i>Contract Days</i>	<i>220</i>	<i>220</i>	<i>220</i>	<i>220</i>	<i>261</i>	<i>220</i>
ADMIN EXPER	Lane 1	Lane 2	Lane 3	Lane 4	Lane 5	Lane 6
1	72,900.00	73,600.00	80,000.00	90,000.00	115,500.00	72,900.00
2	75,087.00	75,808.00	82,400.00	92,700.00	118,965.00	75,087.00
3	77,339.61	78,082.24	84,872.00	95,481.00	122,533.95	77,339.61
4	79,659.80	80,424.71	87,418.16	98,345.43	126,209.97	79,659.80
5	82,049.59	82,837.45	90,040.70	101,295.79	129,996.27	82,049.59
6	84,511.08	85,322.57	92,741.93	104,334.67	133,896.16	84,511.08
7	87,046.41	87,882.25	95,524.18	107,464.71	137,913.04	87,046.41

Lane 1	Assistant Principal, Elementary/Middle
Lane 2	Assistant Principal, High School
Lane 3	Principal, Elementary/Middle
Lane 4	Principal, High School
Lane 5	Executive Director
Lane 6	Director of Teacher Development/Licensing

Longevity Step 10 Year	3%
Longevity Step 15 Year	3%
Longevity Step 20 Year	4%

An educator salary adjustment of \$2,500 is included in the schedule for each school administrator position.
To qualify, employees must have a satisfactory or higher job performance rating in their most recent evaluation.

2021-22 Salary Schedule

*This schedule is based on legislative increases for 2021-22. The Steps are subject to further review and freezes each fiscal year. The review will be based on legislative action, enrollments, and other factors.

**This schedule will take place starting July 1, 2021 for all NEW staff at Summit Academy Inc
all staff previously hired will maintain current salary and receive increments as approved by Administration



Step	Lane 1	Lane 2 (180)	Lane 3 (184)	Lane 4 (184)	Lane 5 (220)	Lane 6 (261)	Lane 7 (220)	Lane 8 (261)	Lane 9 (261)
1	8.0000	15.0000	14.0000	18.0000	18.0000	15.0100	15.0000	18.5000	16.5000
2	8.2400	15.4500	14.4200	18.5400	18.5400	15.4603	15.4500	19.0550	16.9950
3	8.4872	15.9135	14.8526	19.0962	19.0962	15.9241	15.9135	19.6267	17.5049
4	8.7418	16.3909	15.2982	19.6691	19.6691	16.4018	16.3909	20.2154	18.0300
5	9.0041	16.8826	15.7571	20.2592	20.2592	16.8939	16.8826	20.8219	18.5709
6	9.2742	17.3891	16.2298	20.8669	20.8669	17.4007	17.3891	21.4466	19.1280
7	9.5524	17.9108	16.7167	21.4929	21.4929	17.9227	17.9108	22.0900	19.7019
10	9.8390	18.4481	17.2182	22.1377	22.1377	18.4604	18.4481	22.7527	20.2929
12	10.1342	19.0016	17.7348	22.8019	22.8019	19.0142	19.0016	23.4352	20.9017
15	10.4382	19.5716	18.2668	23.4859	23.4859	19.5846	19.5716	24.1383	21.5288
20	10.7513	20.1587	18.8148	24.1905	24.1905	20.1722	20.1587	24.6211	22.1746
Step	Lane 10	Lane 11 (184)	Lane 12 (184)	Lane 13 (184)	Lane 14 (261)				
1	20.0000	20.0000	16.0000	16.7500	22.0000				
2	20.6000	20.6000	16.3200	17.0850	22.4400				
3	21.2180	21.2180	16.6464	17.4267	22.8888				
4	21.8545	21.8545	16.9793	17.7752	23.3466				
5	22.5102	22.5102	17.3189	18.1307	23.8135				
6	23.1855	23.1855	17.6653	18.4934	24.2898				
7	23.8810	23.8810	18.0186	18.8632	24.7756				
10	24.5975	24.5975	18.3790	19.2405	25.2711				
12	25.3354	25.3354	18.9303	19.8177	26.0292				
15	26.0955	26.0955	19.4982	20.4122	26.8101				
20	26.8783	26.8783	19.8882	20.8205	27.3463				

After Step 21, COLA Only



Business and Operations
2022-23 Salary Schedule

*This schedule is based on legislative increases for 2021-22. The Steps are subject to further review and freezes each fiscal year. The review will be based on legislative action, enrollments, and other factors.

** All staff prior to 7/1/2021 will be placed according to current salary in FY21+3%

<i>Holidays</i>	15	15	15	15			
<i>Contract Days</i>	261	261	261	261	220	261	261
ADMIN EXPER	Lane 1	Lane 2	Lane 3	Lane 4	Lane 5	Lane 6	Lane 7
1	90,000.00	55,000.00	78,000.00	102,000.00	52,786.00	51,500.00	50,000.00
2	92,700.00	56,650.00	80,340.00	105,060.00	54,369.58	53,045.00	51,500.00
3	95,481.00	58,349.50	82,750.20	108,211.80	56,000.67	54,636.35	53,045.00
4	98,345.43	60,099.99	85,232.71	111,458.15	57,680.69	56,275.44	54,636.35
5	101,295.79	61,902.98	87,789.69	114,801.90	59,411.11	57,963.70	56,275.44
6	104,334.67	63,760.07	90,423.38	117,000.00	61,193.44	59,702.61	57,963.70
7	107,464.71	65,672.88	93,136.08	120,510.00	63,029.24	61,493.69	59,702.61

Lane 1	Business Administrator
Lane 2	Human Resources
Lane 3	Operations Manager
Lane 4	IT Manager
Lane 5	Food Services Manager
Lane 6	Transportation/Safety Director
Lane 7	Administrative Secretary

Longevity Step 10 Year	3%
Longevity Step 15 Year	3%
Longevity Step 20 Year	4%
After Step 20 COLA Only per legislation	



2021-22 Salary Schedule

*This schedule is based on legislative increases for 2021-22. The Steps are subject to further review and freezes each fiscal year. The review will be based on legislative action, enrollments, and other factors.

Instructional and Testing

Contract Days

189 Days

	ADMIN EXPER	Lane 1
	1	55,000.00
	2	56,650.00
	3	58,349.50
	4	60,099.99
	5	61,902.98
	6	63,760.07
	7	65,672.88

Lane 1

Instructional Coach

Assesment/Testing Coordinator, Data Privacy Coordinator

Longevity Step 10 Year 67,643.06

Longevity Step 15 Year 69,672.35

Longevity Step 20 Year 71,612.73

After Step 20 COLA Only per legislation



This schedule will take place starting July 1, 2021 for all NEW staff at Summit Academy Inc
all staff previously hired will maintain current salary and receive increments as approved by Administration

TEACHER SALARY SCHEDULE

184 Days

Counselors and Social Workers

BS	MS	Add URS Benefit BS Full Time	Add URS Benefit MS Full Time
1 45,620.07	47,901.07	\$ 9,124.01	\$ 9,580.21
2 45,620.07	47,901.07	\$ 9,124.01	\$ 9,580.21
3 46,304.37	48,859.09	\$ 9,260.87	\$ 9,771.82
4 47,230.46	49,836.27	\$ 9,446.09	\$ 9,967.25
5 48,175.07	51,480.87	\$ 9,635.01	\$ 10,296.17
6 49,620.32	52,510.49	\$ 9,924.06	\$ 10,502.10
7 50,612.72	53,560.70	\$ 10,122.54	\$ 10,712.14
8 51,624.98	54,631.91	\$ 10,325.00	\$ 10,926.38
9 52,657.48	55,724.55	\$ 10,531.50	\$ 11,144.91
10 54,237.20	57,563.46	\$ 10,847.44	\$ 11,512.69
11 55,321.95	57,563.46	\$ 11,064.39	\$ 11,512.69
12 55,875.17	57,563.46	\$ 11,175.03	\$ 11,512.69
13 56,433.92	58,714.73	\$ 11,286.78	\$ 11,742.95
14 56,998.26	59,889.03	\$ 11,399.65	\$ 11,977.81
15 57,568.24	61,865.36	\$ 11,513.65	\$ 12,373.07
16 59,295.29	63,102.67	\$ 11,859.06	\$ 12,620.53
17 60,481.19	64,364.72	\$ 12,096.24	\$ 12,872.94
18 61,690.82	65,652.02	\$ 12,338.16	\$ 13,130.40
19 62,924.63	66,965.06	\$ 12,584.93	\$ 13,393.01
20 64,183.13	66,965.06	\$ 12,836.63	\$ 13,393.01
21 64,824.96	66,965.06	\$ 12,964.99	\$ 13,393.01
22 65,473.21	69,174.91	\$ 13,094.64	\$ 13,834.98
23 66,127.94	70,558.40	\$ 13,225.59	\$ 14,111.68
24 67,450.50	71,969.57	\$ 13,490.10	\$ 14,393.91
25 68,799.51	73,408.96	\$ 13,759.90	\$ 14,681.79
26 70,863.49	73,408.96	\$ 14,172.70	\$ 14,681.79
27 71,572.13	73,408.96	\$ 14,314.43	\$ 14,681.79
28 72,287.85	75,831.46	\$ 14,457.57	\$ 15,166.29

2021-22 Salary Schedule

***This schedule is based on legislative increases for 2021-22. The Steps are subject to further review and freezes each fiscal year. The review will be based on legislative action, enrollments, and other factors.**

Steps will be determined by years of proficiency and performance using the charter approved evaluation tool, as well as professionalism.

New Summit Academy staff who have teaching experience must provide documentation of past employment and evaluations in order to be placed appropriately.

Advancement on this schedule may be held back according to evaluations and effectiveness.

An educator salary adjustment of \$4,200 has **already** been added to each salary amount above for all Licensed Teachers.

A letter of intent to make a lane change must be filed with the Human Resource Office by May 1st.

Credits for lane changes must be presented to the Human Resource Office by September 1st. Credit hours are representative of semester credits.

Only credits obtained after certification for which you are hired may be used toward lane change.

Summit Academy Inc will reward a teacher's educational advancement for Doctorate's degrees in a teacher subject area. Proof of advancement must be provided.

Doctorate's Degree \$6,000

Educators whose assignment require special certifications, or other requirements may be eligible for increased salary levels.

Must be approved by both Business Administrator and Director.



Stipends

Gifted and Talented Coordinator	\$500
Grade Level Leads (K-8)	\$1,000
Department Chair (9-12)	\$1,000
Team Leads (9-12)	\$1,000
Yearbook	\$1,500
Mentor	\$300
Mentor Specialist	\$500
Marketing Stipend	\$3,000
Other VAR Stipends	\$500
Literacy	\$1,000
ELL (Each Campus Support)	\$1,000
ELL (LEA Coordinator)	FTE
HOSA (Health Occupations Students of America)	\$1,000
Student Council	\$1,000
LEA Level 504 Coordinator	\$1,000
Site Level 504 when caseload exceeds 2.0% of enrollment	\$500
Site Level 504 when caseload exceeds 3.0% of enrollment	\$500
Theatre	\$750
Music	\$300
Jr High RTI	\$500
Jr High Athletic Director	\$2,000
Various	**

Junior High Athletic Stipends

Cross Country (Boys)	\$500	Per Team
Cross Country (Girls)	\$500	Per Team
Girls Volleyball	\$500	Per Team
Boys Volleyball	\$500	Per Team
Boys Basketball	\$500	Per Team
Girls Basketball	\$500	Per Team
Boys Soccer	\$500	Per Team
Girls Soccer	\$500	Per Team

**All Grade Level and Team Leads are split over 24 pays*

****Several Grant Opportunities through Utah Grants will be paid at various rates maintaining consistency and allowability with regulations of the grant, and as approved by the Business Administrator throughout the year.**

High School Athletic Stipends

ATHLETIC COACH POSITION

*Summit Academy High School pays for the HEAD COACH of each Varsity Program.
ALL other positions on the team will be paid by each teams fundraising, and other fees.

ATHLETIC DIRECTOR	\$7,500
BASEBALL HEAD COACH (VARSITY)	\$3,000
SOFTBALL HEAD COACH (VARSITY)	\$3,000
BOYS BASKETBALL HEAD COACH (VARSITY)	\$4,200
GIRLS BASKETBALL HEAD COACH (VARSITY)	\$4,200
CROSS COUNTRY HEAD COACH (VARSITY)	\$2,000
FOOTBALL HEAD COACH (VARSITY)	\$5,000

GOLF HEAD COACH (GIRLS VARSITY)	\$1,500
GOLF HEAD COACH (BOYS VARSITY)	\$1,500

BOYS SOCCER HEAD COACH (VARSITY)	\$2,500
GIRLS SOCCER HEAD COACH (VARSITY)	\$2,500
SWIMMING HEAD COACH	\$1,500
GIRLS VOLLEYBALL HEAD COACH (VARSITY)	\$2,500
BOYS WRESTLING HEAD COACH (VARSITY)	\$2,500
TRACK HEAD COACH	\$2,500
TENNIS GIRLS HEAD COACH	\$1,500
TENNIS BOYS HEAD COACH	\$1,500
DRILL TEAM	\$2,500
CHEER	\$3,000
THEATRE	\$1,500
DEBATE	\$1,500

Athletic stipends will be paid on the following schedule:

- Fall sports: September and October (4 installments)
- Winter sports: December and January (4 installments)
- Spring sports: March and April (4 installments)

SUMMIT ACADEMY SCHOOLS, INC

Draper

May 20, 2022

TO: Summit Academy Schools, Inc Governing Board

FROM: Brad Wilkinson, Business Administrator

SUBJECT: Monthly Financial Statements/Budget Revision April 30, 2022

BACKGROUND INFORMATION

Each month financial statements are prepared for both Summit Academy, Inc, and Summit Academy High School. The purpose of this report is to transparently state the current financial outlook of each LEA. This report will show the following:

Adopted Budget, Revised Budget, Year to Date Actuals, and % of forecasts.

CURRENT CONSIDERATIONS

To review the financial statement and Budget Revisions and ask any questions that are pertinent. All Budget Revisions since the last Board approved set of revisions are highlighted in Yellow with a brief explanation.

IMPACT ON STUDENT ACHIEVEMENT

Each year the LEA's will prepare fiscal year budgets. The goal of each budget is to develop educational and operational goals in order to achieve academic success and fund other operations of the LEA. The financial statements presented will assist readers in reviewing and comparing financial data in order to achieve financial budget goals.

FINANCIAL IMPLICATIONS

None- Informational Report

RECOMMENDATIONS

To review and ask any financial related questions pertaining to the 2021-22 school year.

DIRECTOR'S RECOMMENDATION:

Informational



Draper -- Bluffdale -- Independence

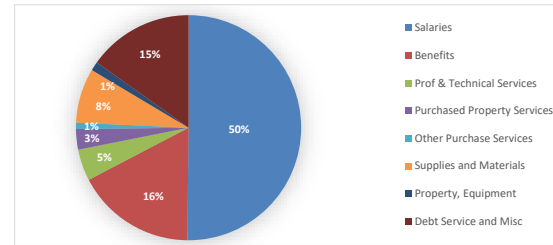
Financial Summary

as of April 30, 2022

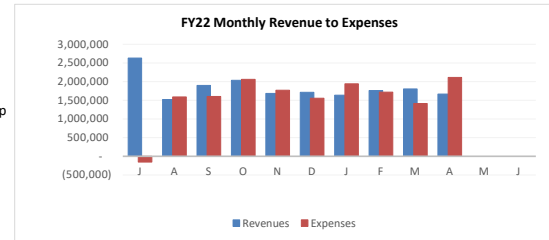
83.0% through the Year

BUDGET REPORT

	Year-to Date Actuals	Adopted Budget	Forecast	% of Forecast
Enrollment	2,027	2,062	2,027	
Revenue				
1000 Local	\$ 1,018,665	\$ 1,438,081	\$ 1,647,792	62%
3000 State	\$ 15,737,600	\$ 19,159,465	\$ 19,082,541	82%
4000 Federal	\$ 1,530,179	\$ 1,310,526	\$ 1,631,207	94%
Total Revenue	\$ 18,286,444	\$ 21,908,072	\$ 22,361,540	82%
Expenses				
100 Salaries	\$ 9,167,524	\$ 10,817,314	\$ 10,949,331	84%
200 Benefits	\$ 2,622,984	\$ 3,759,233	\$ 3,748,417	70%
300 Prof & Technical Services	\$ 687,400	\$ 949,500	\$ 989,000	70%
400 Purchased Property Services	\$ 422,994	\$ 542,875	\$ 642,875	66%
500 Other Purchase Services	\$ 169,578	\$ 171,900	\$ 194,100	87%
600 Supplies and Materials	\$ 1,435,608	\$ 1,595,228	\$ 1,714,363	84%
700 Property, Equipment	\$ 274,102	\$ 536,000	\$ 279,000	98%
800 Debt Service and Misc	\$ 2,366,016	\$ 2,905,125	\$ 3,309,625	71%
Total Expenses	\$ 17,146,206	\$ 21,277,175	\$ 21,826,711	79%
Net Income from Operations	\$ 1,140,238	\$ 630,897	\$ 534,829	
Operating Margin	6.2%	2.9%	2.4%	



Due to Dep



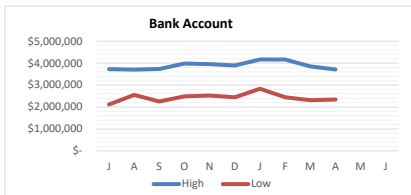
RATIOS

	Actual	Goal	Nat S&P Medians
Operating Margin	2.4%	3.0%	
Debt Service Coverage	1.16	1.3	1.50
Days Cash on Hand	156	100	143
Building Payment %	14.8%	< 20%	12%

Cash Reserve	Operating Margin
\$0-\$300,000	5%
\$300,000-\$500,000	4%
\$500,000-and above	3%

CASH

Ending Cash Balance	\$ 9,344,500	Allotment for March not included
Days Cash on Hand	156	



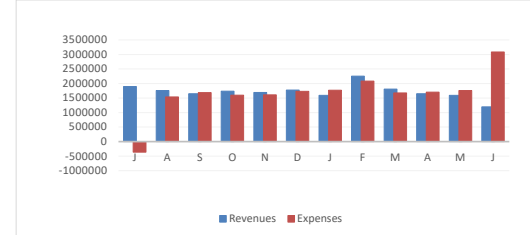
RESERVES

	Actual Ytd	Forecast
Last Year Reserve Balance	\$ 9,338,168	\$ 9,338,168
Reserves Added this Year	\$ 1,525,785	\$ 495,246
Expenses from Reserves		
West Side Project	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
New Reserve Balance	\$ 10,863,953	\$ 9,833,414
DEU	\$ 1,063,858.75	
Capital Projects	\$3,800,000	
Contingencies	\$3,500,018	
Construction	\$780,000	
Educational	\$385,000	
Special Revenue Funds	\$304,538	
	\$ 9,833,414.75	

ENROLLMENT

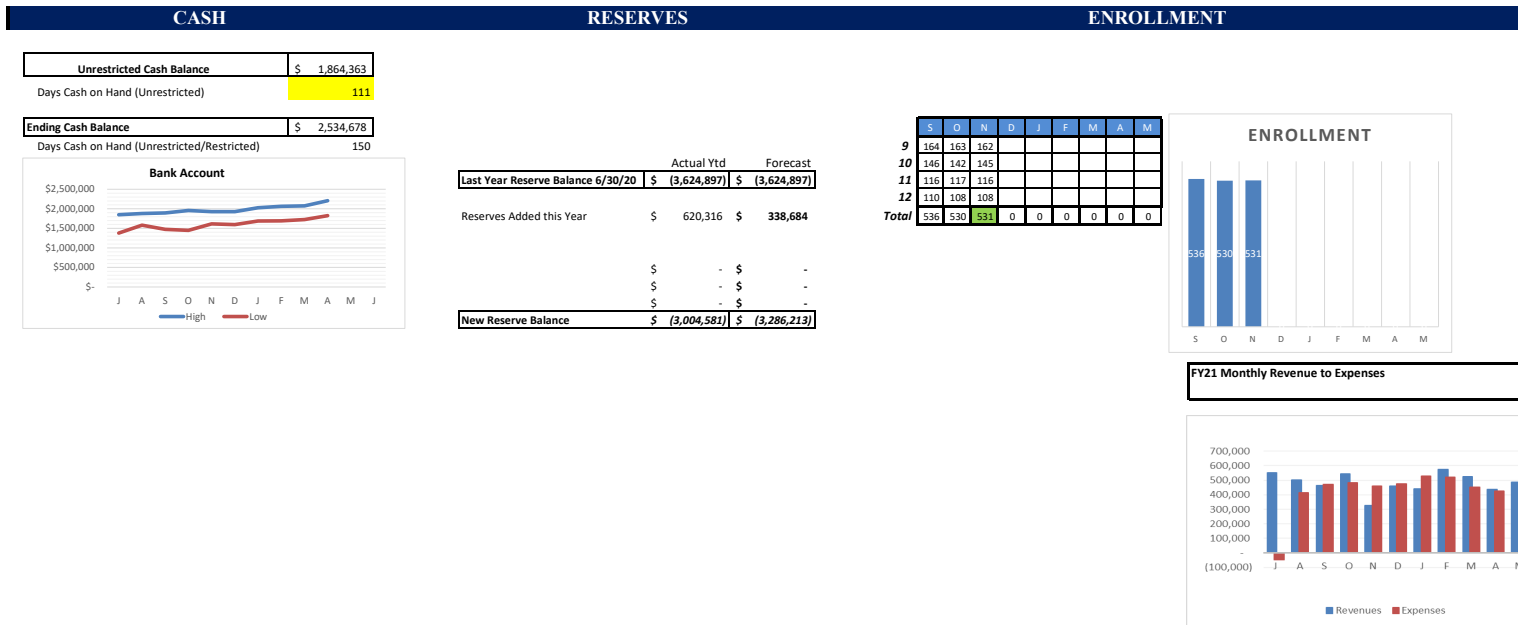
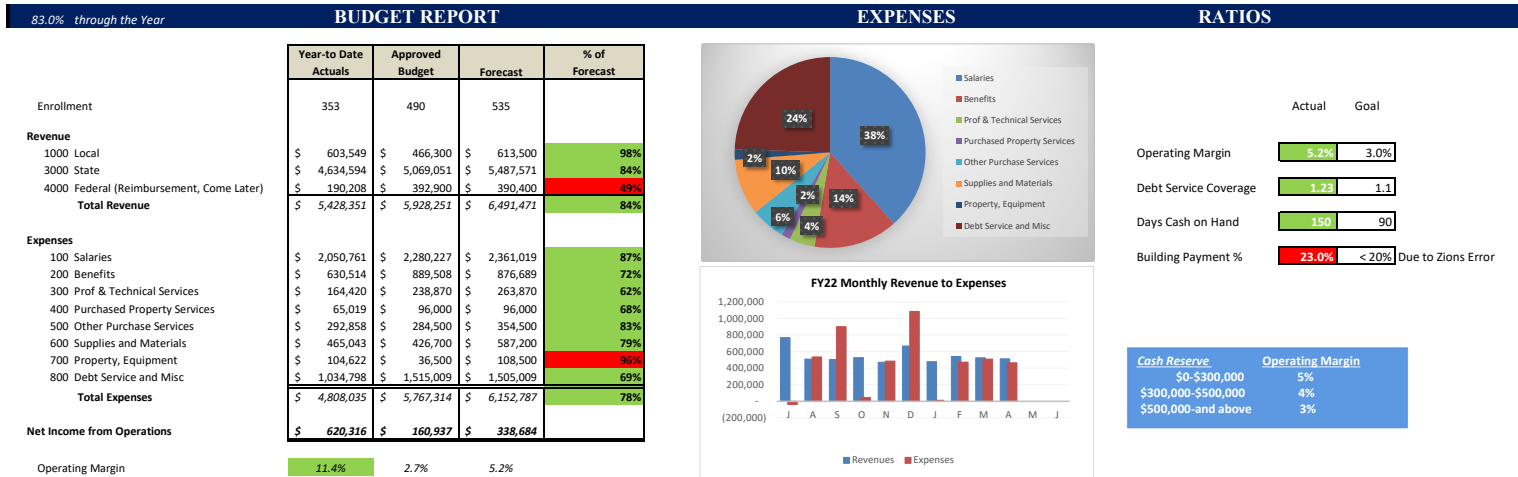
	S	O	N	D	J	F	M	A	M
K	223	224	223						
1	245	246	243						
2	207	208	208						
3	250	250	250						
4	256	257	258						
5	235	235	238						
6	233	235	235						
7	189	187	187						
8	186	185	185						
Total	2024	2027	2027	0	0	0	0	0	0

FY21 Revenue to Expenses





Financial Summary as of April 30, 2022





Academies

	(2,371 Students)		(2,027 Students)	(2,062 Students)		
	FY21 Final Actuals	Changes	FY22 Forecast	FY 22 YTD	% of Forecast FY20 Actuals-21 Forecast	% of Forecast
Budget Detail Report						
Revenue						
1000 Local						
1420 Transfer from High School - Transportation	\$ 25,000		\$ 25,000	\$ 18,750		75.0%
1510 Interest on Investments	\$ 56,793	\$ (75,000)	\$ 50,000	\$ 42,285		84.6%
1610 Sales to Students	\$ 74,390	\$ (25,000)	\$ 50,000	\$ 26,471		52.9%
1710 Student Activities (Admissions, Store, Std Org Memb)	\$ 28,453		\$ 16,560	\$ 15,629		94.4%
1740 Fees	\$ 89,205	\$ 5,000	\$ 95,000	\$ 92,516		97.4%
1770 Fundraisers	\$ 51,764	\$ 18,000	\$ 120,000	\$ 114,670		95.6%
1910 Rentals	\$ 121,272	\$ 8,500	\$ 95,000	\$ 94,733		99.7%
1920 Contributions / Donations	\$ 21,021		\$ 25,000	\$ 22,509		90.0%
1930 Gain / Loss on Sale of Assets	\$ 50		\$ 2,000			0.0%
1950 Revenue from Other Schools (High School)	\$ 58,000		\$ 139,585	\$ 73,761		52.8%
1990 Miscellaneous	\$ 73,849	\$ 46,500	\$ 50,000	\$ 5,967		11.9%
1991 Preschool Income	\$ 419,433	\$ 245,211	\$ 951,297	\$ 511,374		53.8%
Informational						
Refinancing of Loan	\$ 62,877		\$ 65,850			0.0%
Total 1000:	\$ 1,082,107	\$ 223,211	\$ 1,685,292	\$ 1,018,665	155.74%	60.4%

3000 State						
3010 Regular School Prgm K-12	\$ 7,386,617		\$ 7,055,503	\$ 5,687,628		80.6%
3010 Reduction in enrollment		\$ (268,608)	\$ (268,608)			
30x0 Bonus Teacher Money		\$ 33,000	\$ 33,000			
3020 Professional Staff	\$ 491,320	\$ (17,800)	\$ 451,426	\$ 378,307		83.8%
3105 Special Education -- Add-On	\$ 1,498,823	\$ 66,372	\$ 2,153,834	\$ 2,153,834		100.0%
3110 Special Education -- Self-Contained	\$ 72,340	\$ -	\$ 54,913	\$ 45,761		83.3%
3120 Special Education -- Extended Year	\$ 15,059		\$ 6,484	\$ 3,961		61.1%
3125 Special Education - State Programs	\$ 57,896		\$ 23,030	\$ 17,273		75.0%
3128 SpEd -- Extended Yr SpEd Stipends	\$ 909		\$ 3,652			0.0%
3129 CTE Comprehensive Counseling	\$ 40,000		\$ 40,000	\$ 33,333		83.3%
3129 CTE College & Career Awareness	\$ 10,415		\$ 11,818	\$ 13,163		111.4%
3200 COVID Bonus	\$ 387,087				#DIV/0!	
3211 Gifted and Talented					#DIV/0!	
3230 Class Size Reduction - K-8	\$ 759,795	\$ (29,202)	\$ 713,697	\$ 598,263		83.8%
3336 Enhancement for At-risk students	\$ 106,310		\$ 106,310	\$ 94,668		89.0%
3400 EL Software	\$ 9,385		\$ 26,800			0.0%
3410 Flexible Allocation			\$ 304,832	\$ 193,800		63.6%
3500 One Time PL Grant		\$ 19,300	\$ 19,300	\$ 16,110		83.5%
3500 Safe UT Superuse				\$ 1,029		#DIV/0!
3540 Counseling Grant	\$ 5,720		\$ 100,000	\$ 100,000		100.0%
3520 School Land Trust	\$ 337,322		\$ 279,901	\$ 279,901		100.0%
3542 Mental Health Grant	\$ 84,857	\$ 87,473	\$ 87,473	\$ 91,237		104.3%
3627 ISIP Grant					#DIV/0!	
3637 Dual Immersion Grant / Critical Languages Prgm	\$ 7,747	\$ 10,000	\$ 15,000	\$ 18,750		125.0%
3644 JBS STEM Endorsement Center Grants	\$ 91,138	\$ 2,114	\$ 127,114	\$ 127,114		100.0%
3655 Digital Teaching & Learning DTL	\$ 94,052		\$ 145,000	\$ 36,577		25.2%
3674 Suicide Prevention	\$ 423		\$ 2,000	\$ 3,000		150.0%
3677 Computer Science	\$ -		\$ 10,000	\$ 15,000		150.0%
3678 Cigarette Prevention		\$ 7,000	\$ 7,000	\$ 6,998		100.0%
3719 Charter School Local Replacement	\$ 5,280,282		\$ 5,893,582	\$ 4,612,279		78.3%
3725 Charter School Admin Costs			\$ 226,963			0.0%
3770 School Lunch (Liquor Tax)	\$ 207,834	\$ 42,000	\$ 200,000	\$ 184,731		92.4%
3805 Early Literacy Program	\$ 63,185	\$ 2,537	\$ 116,000	\$ 116,021		100.0%
3806 TSSA (Teacher and Student Success Act)	\$ 371,064	\$ 36	\$ 404,998	\$ 326,505		80.6%
3807 TSSP (Tchr Sal Supplement Prgm)	\$ 320			\$ 17,853		#DIV/0!
3810 Library Books & Electronic Res	\$ 2,510		\$ 2,612	\$ 2,063		79.0%

	(2,062 Students)		
Changes	FY22 Adopted Budget		
	\$ 25,000		
\$ (75,000)	\$ 125,000	Adjust	
\$ (25,000)	\$ 75,000	Adjust	
	\$ 16,560		
\$ 5,000	\$ 90,000		
\$ 18,000	\$ 87,000	German	
\$ 8,500	\$ 86,500		
	\$ 16,000		
	\$ 2,000		
	\$ 139,585		
\$ 46,500	\$ 3,500	Adjust	
\$ 245,211	\$ 706,086	Playground, plus other reductions	
	\$ 65,850		
\$ 223,211	\$ 1,438,081		
	\$ 7,268,300		
\$ (268,608)		Reduced Enrollment	
\$ 33,000		New	
\$ (17,800)	\$ 469,226		
\$ 66,372	\$ 2,087,462	Adjustments	
	\$ 54,913		
	\$ 6,484		
	\$ 22,892		
	\$ 3,652		
	\$ 40,000		
	\$ 11,386		
	\$ 742,899		
\$ (29,202)	\$ 106,310		
	\$ 26,800		
	\$ 304,832		
\$ 19,300		New Grant	
	\$ 100,000		
	\$ 102,000	Includes Deferred FY21	
\$ 87,473		Added to Grants	
	\$ -		
\$ 10,000	\$ 5,000		
\$ 2,114	\$ 125,000		
	\$ 145,000		
	\$ 2,000		
	\$ 10,000		
\$ 7,000		New Grant	
	\$ 5,893,582		
	\$ 226,963		
\$ 42,000	\$ 158,000	Adjustments	
\$ 2,537	\$ 113,463	Adjustments	
	\$ 404,962		
	\$ 2,612		



Academies

(2,371 Students)		(2,027 Students)		(2,062 Students)		% of Forecast FY20 Actuals-21 Forecast	% of Forecast
FY21	Final Actuals	Changes	FY22 Forecast	FY 22 YTD			
3868 Teacher Supplies & Materials	\$ 19,350	\$ 3,180	\$ 22,520	\$ 22,520			100.0%
3876 Educator Salary Adjustment	\$ 647,387		\$ 647,387	\$ 539,921			83.4%
3882 Beverly Taylor Sorenson Elem Arts	\$ 52,816		\$ 59,000				0.0%
Total 3000:	\$ 18,101,963	\$ (42,598)	\$ 19,082,541	\$ 15,737,600	105.42%		82.5%
4000 Federal (Reimbursement, Falls behind)							
4500 Broadband	\$ 15,120		\$ 3,700				0.0%
4522 IDEA Preschool			\$ 300,000	\$ 441,091			147.0%
4524 IDEA Part-B	\$ 368,372		\$ 35,000				0.0%
4524 Special Ed State Level Activity		\$ 35,000	\$ 35,000				98.3%
4560 National School Lunch Prgm	\$ 773,739	\$ 475,000	\$ 1,000,000	\$ 982,841			33.4%
4700 CARES Act	\$ 252,662	\$ (260,000)	\$ 200,000	\$ 66,756			20.1%
4800 Title IVA		\$ 10,000	\$ 10,000	\$ 2,005			23.8%
4801 Title IA	\$ 56,020	\$ (114)	\$ 45,986	\$ 10,947			100.0%
4860 MAAP		\$ 10,795	\$ 10,795	\$ 10,795			61.2%
4860 Title IIA	\$ 10,671		\$ 25,726	\$ 15,744			93.8%
Total 4000:	\$ 1,476,584	\$ 270,681	\$ 1,631,207	\$ 1,530,179	110.47%		81.6%
Total Revenue:	\$ 20,660,654	\$ 451,294	\$ 22,399,040	\$ 18,286,444	108.41%		

(2,062 Students)		% of Forecast FY20 Actuals-21 Forecast	% of Forecast
Changes	FY22 Adopted Budget		
\$ 3,180	\$ 19,340		Adjustments
	\$ 647,387		
	\$ 59,000		
\$ (42,634)	\$ 19,159,465		
	\$ 3,700		
	\$ 250,000		
\$ 35,000			
\$ 475,000	\$ 525,000		Larger Reimbursements
\$ (260,000)	\$ 460,000		Deferred
\$ 10,000			New
\$ (114)	\$ 46,100		Small Adjustment
\$ 10,795			
	\$ 25,726		
\$ 270,681	\$ 1,310,526		
\$ 451,258	\$ 21,908,072		

		(2,371 Students)	(2,027 Students)	(2,062 Students)	% of Forecast FY20 Actuals-21 Forecast	% of Forecast
FY21 Final Actuals		Changes	FY22 Forecast	FY 22 YTD		
Budget Detail Report						
Expenses						
100 Salaries						
112.00 District Administration	\$ 130,000		\$ 133,900	\$ 106,004		79.2%
114.00 Business Administrator	\$ 90,000		\$ 101,296	\$ 80,192		79.2%
115.00 Programs / Instructional Coaches	\$ 264,827	\$ 7,964	\$ 332,098	\$ 228,848		68.9%
121.00 Principals & Assistants	\$ 582,531	\$ (82,400)	\$ 503,044	\$ 364,269		72.4%
131.00 Teachers	\$ 5,896,779	\$ 33,000	\$ 5,280,537	\$ 3,382,823		64.1%
133.00 Special Education Teachers	\$ 103,595		\$ 579,164	\$ 324,481		56.0%
132.00 Substitutes	\$ 138,789		\$ 126,501	\$ 155,797		123.2%
133.00 Attendance	\$ 107,282		\$ 45,212	\$ 37,422		82.8%
134.00 Coaching Stipends	\$ 10,450		\$ 11,000	\$ 9,300		84.5%
134.10 Educational Stipends	\$ 274,938	\$ 145,000	\$ 230,000	\$ 165,710		72.0%
134.20 Student Support Stipends	\$ 24,150	\$ (167,000)	\$ 20,000			
142.00 Guidance Counselors/Social Work	\$ 222,292		\$ 312,900	\$ 266,928		85.3%
143.00 Nurse	\$ 1,500		\$ 5,000	\$ 3,098		62.0%
145.00 Librarians	\$ 27,958		\$ 34,762	\$ 30,282		87.1%
152.00 Office Staff	\$ 239,594	\$ 13,872	\$ 291,807	\$ 215,871		74.0%
152.00 HR / Accounting / Mktg / Policy	\$ 88,196	\$ 27,000	\$ 130,000	\$ 119,183		91.7%
152.00 Special Education / CCGP Secretaries	\$ 60,177		\$ 41,602	\$ 38,095		91.6%
152.00 Board Secretary	\$ 2,500		\$ 3,000	\$ 2,103		70.1%
161.00 Testing Coordinator	\$ 41,682	\$ 13,580	\$ 60,100	\$ 42,571		70.8%
161.00 Classroom Paraprofessionals	\$ 820,139	\$ 90,000	\$ 940,868	\$ 685,835		72.9%
161.00 Special Education Paraprofessionals	\$ 434,190		\$ 396,929	\$ 313,489		79.0%
172.00 Bus Driver	\$ 32,783		\$ 57,783	\$ 47,459		82.1%
175.00 Transportation/Safety Director		\$ 75,695	\$ 75,695	\$ 56,178		74.2%
181.00 Facility Supervisor	\$ 50,623		\$ 45,212	\$ 40,207		88.9%
182.00 Custodial / Maintenance Personnel	\$ 226,216		\$ 246,446	\$ 196,572		79.8%
184.00 Technology Support	\$ 109,100		\$ 117,000	\$ 89,297		76.3%
190 Incentives	\$ 59,150	\$ (35,000)	\$ 15,000	\$ 12,000		80.0%
191.00 Food Services Personnel	\$ 381,532	\$ 30,000	\$ 400,000	\$ 333,158		83.3%
101.00 YE Accrual				\$ 1,500,000		
100.00 Preschool Salaries & Wages	\$ 253,041	\$ 10,306	\$ 442,475	\$ 320,352		72.4%
Total 100:	\$ 10,674,014	\$ 162,017	\$ 10,979,331	\$ 9,167,524	102.86%	83.5%
200 Benefits						
210 URS Pension & 401k employer contributions	\$ 1,865,126		\$ 1,849,480	\$ 1,286,118		69.5%
220 Social Security & Medicare ER Match	\$ 746,772	\$ 5,625	\$ 827,323	\$ 560,530		67.8%
241 Health Insurance	\$ 753,476		\$ 897,848	\$ 661,792		73.7%
290 Health Savings Account (Employer)	\$ 62,429		\$ 75,500	\$ 64,873		85.9%
270 Worker's Compensation Fund	\$ 10,325		\$ 21,300	\$ 19,762		92.8%
280 Unemployment Insurance	\$ 3,686		\$ 8,000	\$ 2,455		30.7%
290 Pre School Benefits & Payroll Taxes	\$ 37,793	\$ (36,106)	\$ 68,966	\$ 27,454		39.8%
Total 200:	\$ 3,479,607	\$ (30,481)	\$ 3,748,417	\$ 2,622,984	107.73%	70.0%
300 Prof & Technical Services						
310 Professional Educational Services	\$ 1,768		\$ 7,000	\$ 2,343		33.5%
310 Substitutes Services	\$ 121,680	\$ (2,500)	\$ 84,000	\$ 65,352		77.8%
321 Support Services (Orion) (SpEd)	\$ 594,332		\$ 658,000	\$ 456,169		69.3%
323 Support Services (Not Orion) (SpEd)	\$ 72,666	\$ (9,500)	\$ 100,000	\$ 75,806		75.8%
330 Employee Training & Development	\$ 36,360	\$ 46,500	\$ 105,000	\$ 54,070		51.5%
345 Business Manager Services	\$ 17,456		\$ -	\$ 200	#DIV/0!	
349 Legal Services	\$ 1,285		\$ 7,500	\$ 5,960		79.5%
355 Technical Services (IT)	\$ 4,535		\$ -		#DIV/0!	
352 Audit Services	\$ 18,000	\$ 2,500	\$ 27,500	\$ 27,500		100.0%
Total 300:	\$ 868,082	\$ 37,000	\$ 989,000	\$ 687,400	113.93%	69.5%
400 Purchased Property Services						
410 Water / Sewage / Garbage	\$ 64,691		\$ 75,450	\$ 65,725		87.1%
420 Cleaning Services (Vanguard Cleaning)	\$ 105,746		\$ 109,525	\$ 93,963		85.8%

		(2,062 Students)	
Changes	FY22 Adopted Budget		
	\$ 133,900		
	\$ 101,296		
\$ 7,964	\$ 324,134		Change in Assignment/Job Duties
\$ (82,400)	\$ 585,444		Reduced Online Principal
\$ 33,000	\$ 5,247,537		New Bonus
	\$ 579,164		
	\$ 126,501		
	\$ 45,212		
	\$ 11,000		
\$ 145,000	\$ 85,000		Increased from Grants
\$ (167,000)	\$ 187,000		Shift
	\$ 312,900		
	\$ 5,000		
	\$ 34,762		
\$ 13,872	\$ 277,935		New position
\$ 27,000	\$ 103,000		King, Additional overlap
	\$ 41,602		
	\$ 3,000		
\$ 13,580	\$ 46,520		
\$ 90,000	\$ 850,868		Summer, ESSER III, PL Grant
	\$ 396,929		
	\$ 57,783		
\$ 75,695			New Position
	\$ 45,212		
	\$ 246,446		
	\$ 117,000		
\$ (35,000)	\$ 50,000		Adjust
\$ 30,000	\$ 370,000		Spend down plan
			This is an estimate of the YE Accrual
\$ 10,306	\$ 432,169		Reduce
\$ 162,017	\$ 10,817,314		
	\$ 1,849,480		
\$ 5,625	\$ 821,698		ESSER III
	\$ 897,848		
	\$ 75,500		
	\$ 21,300		
	\$ 8,000		
\$ (36,106)	\$ 85,407		Reduce
\$ (30,481)	\$ 3,759,233		
	\$ 7,000		
\$ (2,500)	\$ 84,000		
	\$ 658,000		
\$ (9,500)	\$ 109,500		
\$ 46,500	\$ 58,500		PD Grant Increase, Plus STEM CO
	\$ -		
	\$ 7,500		
	\$ -		
\$ 2,500	\$ 25,000		
\$ 37,000	\$ 949,500		
	\$ 75,450		
	\$ 109,525		



Academies

		(2,371 Students)	(2,027 Students)	(2,062 Students)		
<i>Budget Detail Report</i>		FY21 Final Actuals	Changes	FY22 Forecast	FY 22 YTD	% of Forecast FY20 Actuals-21 Forecast
431 Repairs / Maintenance / Monitoring	\$	93,957	\$ 100,000	\$ 239,000	\$ 146,777	61.4%
432 Bus Repairs & Maintenance	\$	12,508		\$ 25,000	\$ 22,263	89.1%
433 Repairs & Maintenance - Lunch Program	\$	5,576		\$ 19,000	\$ 12,377	65.1%
435 Lawn Care & Snow Removal	\$	68,033		\$ 82,900	\$ 41,514	50.1%
443 Copier Lease & Servicing & Mail Machine Rental	\$	70,550		\$ 92,000	\$ 40,375	43.9%
450 Construction						#DIV/0!
<i>Total 400:</i>	\$	421,061	\$ 100,000	\$ 642,875	\$ 422,994	152.68%

		(2,062 Students)	
Changes	FY22 Adopted Budget		
\$ 100,000	\$ 139,000	Add from 700's	
	\$ 25,000		
	\$ 19,000		
	\$ 82,900		
	\$ 92,000		
\$ 100,000	\$ 542,875		



Academies

		(2,371 Students)	(2,027 Students)	(2,062 Students)		
Budget Detail Report		FY21 Final Actuals	Changes	FY22 Forecast	FY 22 YTD	% of Forecast FY20 Actuals-21 Forecast
500 Other Purchased Services						
520 Property/Liability/Non employee Insurances/Bus	\$	63,315	\$ 5,000	\$ 68,500	\$ 65,395	95.5%
510 Bus Services	\$	6,089	\$ (5,000)	\$ 1,200	\$ 860	71.7%
530 Communication (phone, phone stipends, postage..)	\$	32,097		\$ 35,200	\$ 31,647	89.9%
540 Marketing	\$	6,762		\$ 52,000	\$ 42,942	82.6%
542 Board Expenses	\$	156		\$ 5,000	\$ 561	11.2%
580 Travel (Staff)	\$	1,878	\$ 11,700	\$ 20,000	\$ 8,938	44.7%
591 Activities / Student Council	\$	976		\$ 6,900	\$ 9,066	131.4%
592 Athletics - Services & Stipends	\$	7,037		\$ 11,300	\$ 1,350	11.9%
593 SPO Service Expenses	\$	22		\$ 3,000	\$ 6,506	216.9%
599 Teacher Recruitment	\$	1,294		\$ 500	\$ 2,313	462.6%
Total 500:		\$ 119,626	\$ 11,700	\$ 203,600	\$ 169,578	170.20%
600 Supplies and Materials						
610 Educational / Classroom Supplies	\$	156,911	\$ 21,600	\$ 145,000	\$ 126,839	87.5%
611 Extracurricular Supplies	\$	27,349		\$ 10,000	\$ 11,787	117.9%
612 Copy Paper	\$	-		\$ 23,500	\$ 20,714	
612 Office Supplies	\$	43,141		\$ 47,000	\$ 24,157	51.4%
613 Drama	\$	3,086		\$ 3,200	\$ 7,933	
618 Support Service Materials (SpEd)	\$	10,565	\$ (18,500)	\$ 20,000	\$ 12,245	61.2%
618 CCGP (Counseling) Materials	\$	11,104		\$ 24,000	\$ 9,752	40.6%
619 Training & Appreciation Supplies	\$	11,384	\$ 14,000	\$ 30,000	\$ 31,547	105.2%
619 Athletics and Other	\$	6,289		\$ 9,500	\$ 12,880	135.6%
613 Pre School Supplies & Materials	\$	25,837	\$ (91,665)	\$ 90,050	\$ 53,600	59.5%
619 SPO Materials	\$	19,032		\$ 53,000	\$ 41,454	78.2%
620 Fundraising Expense	\$		\$ 35,000	\$ 35,000	\$ 39,568	
621 Natural Gas	\$	46,416		\$ 44,000	\$ 43,961	99.9%
622 Electricity	\$	172,411		\$ 159,000	\$ 146,856	92.4%
624 Fuel for the Buses	\$	7,928	\$ 6,500	\$ 17,000	\$ 17,765	104.5%
631 Lunch Program Food	\$	354,127	\$ 130,000	\$ 450,000	\$ 409,224	90.9%
641 Curriculum	\$	183,036		\$ 155,000	\$ 157,774	101.8%
644 Library	\$	4,283		\$ 4,000	\$ 2,757	68.9%
650 Tech Supplies (Under \$500)	\$	341,463	\$ 10,000	\$ 149,613	\$ 131,301	87.8%
670 Educational Software	\$	58,643	\$ 72,200	\$ 125,000	\$ 34,578	27.7%
670 QuickB / Acuity / Blackboard / Time Cards	\$	3,842	\$ (75,000)	\$ 15,000	\$ 5,307	35.4%
680 Maintenance & Cleaning Supplies	\$	92,493	\$ 15,000	\$ 102,000	\$ 92,131	90.3%
680 Bus Maintenance Supplies	\$	1,870		\$ 3,500	\$ 1,478	42.2%
Total 600:		\$ 1,581,210	\$ 119,135	\$ 1,714,363	\$ 1,435,608	108.42%
700 Property, Equipment						
710 Land & Site Improvements	\$	8,106	\$ 320,000	\$ 500,000	\$ 210,612	42.1%
720 Buildings	\$	298	\$ (145,000)	\$ 55,000	\$ 35,224	64.0%
732 School Buses	\$	199	\$ 150,000	\$ 150,000	\$ 10,000	6.7%
733 Furniture	\$	2,197	\$ 13,000	\$ 13,000	\$ 5,909	45.5%
734 Technology-Related Hardware & Software	\$	9,724		\$ 11,000		0.0%
738 Kitchen Equipment	\$		\$ 90,000	\$ 120,000	\$ 12,357	10.3%
740 Depreciation Expense				\$ (575,000)		#DIV/0!
741 Move expense to asset				\$ 5,000		0.0%
739 Facility Equipment	\$		\$ (105,000)	\$ 5,000		0.0%
Total 700:		\$ 20,524	\$ 323,000	\$ 279,000	\$ 274,102	1359.38%
800 Debt Service and Misc						
810 Dues & Fees / Bank Fees	\$	21,810		\$ 29,000	\$ 20,035	69.1%
Informational						
830 Interest (Series 2019 Bonds)	\$	1,790,021	\$ (245,000)	\$ 1,660,625	\$ 1,580,314	95.2%
840 Principal (Series 2019 Bonds)	\$	813,333		\$ 920,000	\$ 756,667	82.2%
850 Carry Over			\$ (45,000)			#DIV/0!
844 Series 2019 Bonds - Moral Ob ins, rating, Trustee fee	\$	94,379		\$ 700,000	\$ 9,000	1.3%

		(2,062 Students)	
Changes	FY22 Adopted Budget		
\$ 5,000	\$ 63,500		
\$ (5,000)	\$ 6,200		
	\$ 35,200		
	\$ 32,000	Adjust Contract	
	\$ 5,000		
\$ 11,700	\$ 8,300	Inflation	
	\$ 6,900		
	\$ 11,300		
	\$ 3,000		
	\$ 500		
\$ 11,700	\$ 171,900		
\$ 21,600	\$ 123,400	E Cigarette Adjustment, Grants	
	\$ 10,000		
	\$ 23,500		
	\$ 47,000		
	\$ 3,200		
\$ (18,500)	\$ 38,500	Reduction	
	\$ 24,000		
\$ 14,000	\$ 16,000		
	\$ 9,500		
\$ (91,665)	\$ 181,715	Reduction	
	\$ 53,000		
\$ 35,000		German	
	\$ 44,000		
	\$ 159,000		
\$ 6,500	\$ 10,500	Inflation Increase	
\$ 130,000	\$ 320,000	Spend down	
	\$ 155,000		
	\$ 4,000		
\$ 10,000	\$ 139,613		
\$ 72,200	\$ 52,800	ESSER III Lexia, Acadiance	
\$ (75,000)	\$ 90,000	Software is on hold	
\$ 15,000	\$ 87,000	ESSER III	
	\$ 3,500		
\$ 119,135	\$ 1,595,228		
\$ 320,000	\$ 180,000	Preschool Playground	
\$ (145,000)	\$ 200,000	Reduction	
\$ 150,000			
\$ 13,000			
	\$ 11,000		
\$ 90,000	\$ 30,000	Spend down plan	
		Add FY22 Depreciation Expense	
		Move all expenses over \$5,000 to Assets	
\$ (105,000)	\$ 115,000	Reduction	
\$ 323,000	\$ 536,000		
	\$ 29,000		
\$ (245,000)	\$ 1,905,625	Bond Premium Adjustment	
	\$ 920,000		
\$ (45,000)	\$ 45,000	Includes Facilities, Athletics, SPO	
	\$ 5,500	Adjust	



Academies

		(2,371 Students)		(2,027 Students)		(2,062 Students)			
		FY21	Final Actuals	Changes	FY22 Forecast	FY 22 YTD	% of Forecast FY20 Actuals-21 Forecast	% of Forecast	
<i>Budget Detail Report</i>									
Total 800:		\$	2,719,543	\$	(290,000)	\$	3,309,625	\$	2,366,016
Total Expenses:		\$	19,883,667	\$	432,371	\$	21,866,211	\$	17,146,206
Net Income:		\$	776,987	\$	18,923	\$	532,829	\$	1,140,238
									214.0%
				Goal of 5%	\$	1,119,952			
				Min Goal of 3%	\$	671,971			

Bond transaction	
Bond Proceeds	\$ 48,000,499
Land & Site Improvements	\$ (52,910)
Buildings	\$ (31,517,441)
Principal Payments	\$ (14,645,000)
Debt Issuance Cost	\$ (1,469,002)
Net of Transaction	\$ 316,146

		(2,062 Students)				
Changes		FY22 Adopted Budget				
\$	(290,000)	\$	2,905,125			
\$	432,371	\$	21,277,175			
\$	18,887	\$	630,897	Below 3% at this point due to Lunch Spend down plan		
Goal of 5%	\$	1,095,404				
Min Goal of 3%	\$	657,242				

SUMMIT ACADEMY SCHOOLS, INC

Draper

Special Meeting, May 19, 2022

TO: Summit Academy Schools, Inc Governing Board

FROM: Michael Clark, Executive Director

SUBJECT: School Meal Policy #6201

BACKGROUND INFORMATION

Summit Academy Schools are committed to providing a healthy meal to students. This policy will help determine price per meal and when parent will be notified of money owed on students account balance.

CURRENT CONSIDERATIONS

Please see the attached policy for board approval.

FINANCIAL IMPLICATIONS

None

RECOMMENDATIONS

It is respectfully requested that the Governing Board approve the School Meal Policy.

DIRECTOR'S RECOMMENDATION: Recommended Approval.



~~Lunch Charge~~ **School Meal Policy**

Policy Number: 6201

~~I. Summit Academy Schools Directive~~ **Purpose**

The Summit Academy Board of Trustees has established general guidelines and standards to align with the National Federal school lunch program. ~~We as a school participate in the National Federal school lunch program.~~ Pricing policies for school meals are determined at the local level including decisions about whether or not to extend credit to parents who do not have lunch money in their student accounts or whether or not to provide alternate meals to such students. It is the parent's responsibility to ensure that their child has money in his or her meal account.

II. Policy

The purpose of this policy is to explain how Summit Academy will notify parents about money owed for student meals; of the school's procedures for providing meals if students' accounts are delinquent; and to assure and remind parents and school employees that students will never be confronted or embarrassed about money owed for school meals.

A. A school meal consists of a main meal (hot or sandwich), a choice of one drink (milk, juice, or water), and a trip to the fruit and salad bar (with 2 to 3 choices of fruit and 5 to 6 choices of veggies). Grades 6-12 can buy extra foods a la carte, at extra expense.

B. **Breakfast cost is:**

~~Elementary: \$1.50 \$1.75 Jr High: \$1.50 \$1.75 High School: \$2.00 Adults \$1.50 \$1.75~~

C. **Lunch cost is:**

~~Elementary: \$2.50 \$2.75 Jr. High: \$2.75 \$3.00 High School: \$3.00 \$3.25 Adults/Staff: \$3.50 \$4.00~~

D. Parents could qualify for Free or Reduced (\$0.40) lunch by filling out an application available at www.summitacademyschools.org under the ~~Information tab~~ **Parent/Students tab** or by contacting the front offices. If the student's family receives benefits from SNAP, FEP, or FDPIR, they do not need to fill out an application but will need to inform the school lunch secretary by calling 801-572-9007.

Meals can be paid for electronically by visiting secureinstantpayments.com or with cash or check, with student name and ID, at the school office.

III. Identification of Delinquent Accounts:

1. Each student account balance will be reviewed on a weekly basis.
2. Parents/staff will be notified by an e-mail sent by the lunch secretary every week for negative accounts of **-\$5.00** or more.
3. Cashiers will ask students/staff if they have any payment from home (6-12 grade). Students in the negative will **NOT** be able to buy a la carte items.
4. Phone calls to homes by the lunch secretary when account reaches **-\$15.00**.
5. Delinquent accounts of **-\$20.00** will be sent a letter home. Students (K-12 grade) may be given an alternate meal at \$1.50 charge, \$0.40 for reduced eligible students. Students will pick up their lunch at the office. Alternate meal consists of a sandwich, fruit, drink.
6. Principals will be notified after **-\$35.00** delinquency to make arrangements with parents to make payments. Students **will** be given an alternate meal picked up from the office.
7. If there is no response, accounts will be sent to collections at the cost of the customer.

****In May, the last month of school, students in the negative will be given an alternate meal****

Refunds will be issued to parents upon request.

No refunds under \$10.00, handling cost.

Summit Academy is an equal opportunity institute.

IV. References None

None

V. Attachments

None

VI. Revision History and Approval Date

Version 1: May2017: Original Date of Approval

Version 2: January2019: Last Revision

Version 3: 2022: Price increase; formatting update name change, and policy number added

SUMMIT ACADEMY DRAPER CAMPUS

JUNIOR HIGH SCHOOL FEE SCHEDULE 2021-2022

Fees Listed are the MAXIMUM amount allowed for each

The maximum aggregate per year for each student is \$950.00

Fees for Fully or Partially Enrolled Students

Registration Fee (both in seat and online)

Spend Plan: *Student incentives, Locker upkeep, Science materials & supplies, Science Fair, PE balls, Jump other gym devices*

Curricular Fees

Class Fee

Spend Plan: *Includes: Foods (food), Art (drawing and painting materials, Sculpture (scul*

Choir \$55

Spend Plan: *Polo Shirt, Hoodie*

State Honor Choir (by audition only) \$45

Spend Plan: *(fee includes: transportation and registration)*

Choir Festival \$85

Spend Plan: *transportation, Lagoon pass, entry fee*

Hope Squad \$55

Spend Plan: *t-shirt or polo and hoodie*

National Junior Honor Society \$30

Spend Plan: *Registration and shirt*

Student Council \$65

Spend Plan: *t-shirt or polo and jacket*

La Caille Field Trip

Lagoon Fee

Field Trip Fee

Field trip examples: Maker's Space, Theatre, Musical Theatre, Stage Tech, Interior Design

Extra-Curricular Fees

Kindergarten Enrichment (Extended day kindergarten)

per week	per week	per week	per week	5 days per week
\$135	\$180	\$225	\$270	\$315

Spend Plan: *Teacher salary and supplies*

Summer Camp Registration (June 6th-July 29th Monday- \$75

Spend Plan: *Summer Camp t-shirt, field trips and water bottle*

Pre-Kindergarten camp(4 year olds) 9:00am-12:30pm \$80/Weekly

1st-6th grades 9:00am-5:30pm

\$225/Weekl

Spend Plan: Instructor

Athletic Sweatshirts (Optional for each season or sport)

40.00

Basketball

150.00

Spend Plan: coaches, officials and t-shirt

Cross-Country

70.00

Spend Plan: coaches, officials and t-shirt

Soccer

120.00

Spend Plan: coaches, officials and t-shirt

Ultimate Frisbee

80.00

Spend Plan: coaches, officials and t-shirt

Volleyball

110.00

Spend Plan: coaches, officials and t-shirt

Dances

10.00

Spend Plan: Decorations, refreshments

Non-waivable Fees (not included in maximum)

Yearbook (Hardcover)

SUMMIT ACADEMY INDEPENDENCE CAMPUS

JUNIOR HIGH SCHOOL FEE SCHEDULE 2021-2022

Fees Listed are the MAXIMUM amount allowed for each activity

The maximum aggregate per year for each student is \$950.00*

Fees for Fully or Partially Enrolled Students

Registration Fee	(both in seat and online)	\$75.00
<i>Spend Plan: Student incentives, Locker upkeep, Science materials & supplies, Science Fair, PE balls, Jump ropes, other gym devices</i>		
Curricular Fees		
Class Fee		\$10.00 per class
<i>Spend Plan: Only: Foods (food), Art (drawing, painting, clay and other materials,</i>		
Class Fee		\$20.00 per class
<i>Spend Plan: Lego Robotics (Lego League membership, robots, batteries)</i>		
State Honor Choir (by audition only)		\$45.00
<i>Spend Plan: transportation and registration</i>		
Shakespeare Competition		\$85.00
<i>Spend Plan: registration, hotel, dinner, shirt, play ticket</i>		
Lego Robotics Competition		\$20.00
<i>Spend Plan: competition fee, lunch, t-shirt</i>		
Band/Choir		\$55.00
<i>Spend Plan: Polo Shirt, Hoodie (optional)</i>		
Hope Squad		\$55.00
<i>Spend Plan: t-shirt or polo and hoodie</i>		
National Junior Honor Society		\$22.00
<i>Spend Plan: Registration and shirt</i>		
Student Council		\$80.00
<i>Spend Plan: jacket</i>		
Peer Leadership Team t-shirt or polo and hoodie		\$55.00
<i>Spend Plan: t-shirt or polo and hoodie</i>		
Restaurant Field Trip		Discounted Price
Lagoon Fee		Discounted Price
Field Trip Fee		\$10.00 - \$20.00
<i>Field trip examples: Performing Arts, World Languages, Art, Forensics, Coding</i>		

Extra-Curricular Fees

Kindergarten Enrichment (Extended day kindergarten)					
	1 day per week	2 days per week	3 days per week	4 days per week	5 days per week
	\$135	\$180	\$225	\$270	\$315
Afterschool Program					
	Regular Day	\$12.50 per	Short Day:	\$18.50 per day	
<i>Spend Plan: Teacher salary and supplies</i>					
Summer Camp Registration (June 6th-July 29th Monday-Friday)					\$75
<i>Spend Plan: Summer Camp t-shirt, field trips and water bottle</i>					
Pre-Kindergarten camp(4 year olds) 9:00am-12:30pm					\$80/Weekly
1st-6th grades 9:00am-5:30pm					\$225/Weekly
<i>Spend Plan: Instructor</i>					
Basketbal					\$150.00
<i>Spend Plan: c oaches, officials and t-shirt</i>					
Cross-Country					\$70.00
<i>Spend Plan: c oaches, officials and t-shirt</i>					
Soccer					\$120.00
<i>Spend Plan: c oaches, officials and t-shirt</i>					
Volleyball					\$110.00
<i>Spend Plan: c oaches, officials and t-shirt</i>					
Dances					\$10.00
<i>Spend Plan: D ecorations, refreshments</i>					
5th and 6th grade band					\$100.00
<i>Spend Plan: I nstruction</i>					

Non-waivable Fees (not included in maximum)

Yearbook (Hardcover)	\$30.00
Athletic Sweatshirts (Optional for each season or sport)	\$40.00

* Not including kindergarten enrichment

SUMMIT ACADEMY Bluffdale CAMPUS

FEE SCHEDULE 2021-2022

Fees Listed are the MAXIMUM amount allowed

(both in seat and online)

The maximum aggregate per year for each student is \$100.00*

Extra-Curricular Fees

Kindergarten Enrichment (Extended day kindergarten)

1 day per week	2 days per week	3 days per week	4 days per week	5 days per week
\$135	\$180	\$225	\$270	\$315

5th and 6th grade band

\$100

Spend Plan: Instructor

Summer Camp Registration (June 6th-July 29th Monday-Friday)

\$75

Spend Plan: Summer Camp t-shirt, field trips and water bottle

Pre-Kindergarten camp(4 year olds) 9:00am-12:30pm

\$80/Weekly

1st-6th grades 9:00am-5:30pm

\$225/Weekly

Spend Plan: Instructor

SUMMIT ACADEMY DRAPER CAMPUS

School Fee Schedule 2022-2023

Fees listed are the maximum amount allowed for each activity

The maximum aggregate per year for each student without Kindergarten Enrichment and Summer Camp is \$972.00

The maximum aggregate per year for each student Kindergarten-5th Grade including Summer Camp and Kindergarten Enrichment is \$12,870.00

The maximum aggregate per year for each student 6th-8th Grade including Summer Camp is \$2,772

Fees for All Students 6th-8th Grade

Registration Fee	\$75
------------------	------

Spend Plan: Student incentives, Locker upkeep, Science materials & supplies, Science Fair, PE balls, Jump ropes, other gym devices

6th-8th Grade Curricular Fees

Class Fee	\$10 per class
-----------	----------------

Spend Plan: Includes: **Foods** (food), **Art** (drawing and painting materials, Sculpture (sculpting materials)

Band/Choir	\$55
------------	------

Spend Plan: Polo Shirt, Hoodie

State Honor Choir (by audition only)	\$45
--------------------------------------	------

Spend Plan: (fee includes: transportation and registration)

Choir Festival	\$85
----------------	------

Spend Plan: transportation, Lagoon pass, entry fee

Hope Squad	\$55
------------	------

Spend Plan: t-shirt or polo and hoodie

National Junior Honor Society	\$30
-------------------------------	------

Spend Plan: Registration and shirt

Student Council	\$65
-----------------	------

Spend Plan: t-shirt or polo and jacket

Restaurant Field Trip	Discounted Price
-----------------------	------------------

Lagoon Fee	Discounted Price
------------	------------------

Field Trip Fee	\$10 - \$20
----------------	-------------

Field trip examples: Maker's Space, Theatre, Musical Theatre, Stage Tech, Interior Design

Extra-Curricular Fees Kindergarten-6th Grade

Summer Camp Registration (June 6th-July 29th Monday-Friday)	\$75
---	------

Spend Plan: Summer Camp t-shirt, field trips and water bottle

Summer Camp Pre-Kindergarten camp(4 year olds) 9:00am-12:30pm	\$80/Weekly
---	-------------

Summer Camp 1st-6th grades 9:00am-5:30pm	\$225/Weekly
--	--------------

Spend Plan: Instructor, supplies

Afterschool Program Registration Fee (Kindergarten-5th Grade)	\$75
---	------

after school till 5:45pm	Regular School Day \$13/Day	Early Out \$19/Day
--------------------------	-----------------------------	--------------------

Spend Plan: teacher salary and supplies

Kindergarten Enrichment Registratoin Fee (Extended day kindergarten)	\$75
--	------

1 day	2 days	3 days		
per	per	per	4 days per	5 days per
week	week	week	week	week
\$135	\$180	\$225	\$270	\$315

Spend Plan: Teacher salary and supplies

Extra Curricular Fees Grades 6th-8th

Basketball	\$150
------------	-------

Spend Plan: coaches, officials and t-shirt

Cross-Country	\$70
<i>Spend Plan: coaches, officials and t-shirt</i>	
Soccer	\$120
<i>Spend Plan: coaches, officials and t-shirt</i>	
Ultimate Frisbee	\$80
<i>Spend Plan: coaches, officials and t-shirt</i>	
Volleyball	\$110
<i>Spend Plan: coaches, officials and t-shirt</i>	
Dances	\$10
<i>Spend Plan: Decorations, refreshments</i>	

Non-waivable Fees (not included in maximum aggregate)

Yearbook (Hardcover)	\$30
Athletic Sweatshirts (Optional for each season or sport)	\$40

SUMMIT ACADEMY INDEPENDENCE CAMPUS

School Fee Schedule 2022-2023

Fees listed are the maximum amount allowed for each activity

The maximum aggregate per year for each student without Kindergarten Enrichment and Summer Camp is \$2,694

The maximum aggregate per year for each student Kindergarten-5th Grade including Summer Camp and Kindergarten Enrichment is \$15,564.00

The maximum aggregate per year for each student 6th-8th Grade including Summer Camp is \$4,494

Fees for All Students 7th-8th Grade

Registration Fee	\$75
<i>Spend Plan: student incentives, locker upkeep, science materials & supplies, science Fair, PE balls, jump ropes, other gym devices</i>	
7th-8th Grade Curricular Fees	
Class Fee	\$10/per class
<i>Spend Plan: Only: Foods (food), Art (drawing, painting, clay and other materials) Theater (costumes, props)</i>	
Class Fee	\$25/per class
<i>Spend Plan: Lego Robotics (Lego League membership, robots, batteries, t-shirt)</i>	
State Honor Choir (by audition only)	\$45
<i>Spend Plan: transportation and registration</i>	
Shakespeare Competition	\$150
<i>Spend Plan: registration, hotel, dinner, shirt, play ticket</i>	
Lego Robotics Competition	\$15
<i>Spend Plan: competition fee & lunch</i>	
Band/Choir	\$55
<i>Spend Plan: polo shirt, hoodie (optional)</i>	
Hope Squad	\$55
<i>Spend Plan: t-shirt or polo and hoodie</i>	
National Junior Honor Society	\$22
<i>Spend Plan: registration and shirt</i>	
Student Council	\$80
<i>Spend Plan: jacket</i>	
Peer Leadership Team	\$55
<i>Spend Plan: t-shirt or polo and hoodie</i>	
Restaurant Field Trip	Discounted Price
End of Year Field Trip (Lagoon, Boondocks, etc.) Fee	Discounted Price
Field Trip Fee	\$10 - \$40
<i>Field trip examples: Performing Arts, World Languages, Art, Forensics, Coding</i>	
Homebase/Advisory	\$20
<i>Spend Plan: t-shirt, class activities</i>	
German DLI Culture Class	\$10
<i>Spend Plan: crafts and food supplies</i>	

Extra-Curricular Fees

Summer Camp Registration (June 6th-July 29th Monday-Friday)	\$75
<i>Spend Plan: Summer Camp t-shirt, field trips and water bottle</i>	
Pre-Kindergarten camp (4 year olds) 9:00am-12:30pm	\$80/Weekly
1st-6th grades 9:00am-5:30pm	\$225/Weekly
<i>Spend Plan: Instructor, supplies</i>	
Kindergarten Enrichment Registratoin Fee (Extended day kindergarten)	\$75
1 day per week	\$135
2 days per week	\$180
3 days per week	\$225
4 days per week	\$270
5 days per week	\$315
<i>Spend Plan: Teacher salary and supplies</i>	
Afterschool Program Registration Fee (Kindergarten-5th Grade)	\$75
after school till 5:45	Regular School Day: \$13 per day
	Early Out: \$19 per day
<i>Spend Plan: teacher salary and supplies</i>	

Extra Curricular Fees Grades 6th-8th

Basketball	\$150
<i>Spend Plan: coaches, officials and t-shirt</i>	
Cross-Country	\$70
<i>Spend Plan: coaches, officials and t-shirt</i>	
Soccer	\$120
<i>Spend Plan: coaches, officials and t-shirt</i>	
Volleyball	\$110
<i>Spend Plan: coaches, officials and t-shirt</i>	
Dances	\$10
<i>Spend Plan: tickets & refreshments</i>	
6th, 7th & 8th Grade Band	\$100
<i>Spend Plan: instruction</i>	
After School Science	\$5 per event
<i>Spend Plan: science supplies</i>	
HOSA	\$30
<i>Spend Plan: t-shirt and organization membership</i>	
HOSA Competition (optional)	\$40
<i>Spend Plan: competition entrance fee</i>	
HOSA Fall Leadership Conference	\$50
<i>Spend Plan: entrance fee</i>	
HOSA Spring Leadership Conference (optional)	\$150
<i>Spend Plan: hotel, transportation, food</i>	
HOSA International Leadership Conference (optional)	\$1,250
<i>Spend Plan: hotel, transportation, food</i>	

Non-waivable Fees (not included in maximum)

Yearbook (Hardcover)	\$30
Athletic Sweatshirts (Optional for each season or sport)	\$40

SUMMIT ACADEMY Bluffdale CAMPUS

FEE SCHEDULE 2022-2023

Fees listed are the maximum amount allowed

The maximum aggregate per year for each student without Kindergarten Enrichment and Summer Camp Kindergarten-5th Grade is \$0

The maximum aggregate per year for each student Kindergarten-5th Grade including Summer Camp and Kindergarten Enrichment is \$12,870.00

The maximum aggregate per year for each 6th grade student without Summer Camp is \$560

Extra-Curricular Fees Kindergarten-5th Grade

Summer Camp Registration (June 6th-July 29th Monday-Friday)	\$75
<i>Spend Plan: Summer Camp t-shirt, field trips and water bottle</i>	
Summer Camp Pre-Kindergarten camp (4 year olds) 9:00am-12:30pm	\$80/Weekly
Summer Camp 1st-6th Grades 9:00am-5:30pm	\$225/Weekly
<i>Spend Plan: Instructor, supplies</i>	
Kindergarten Enrichment (Extended day kindergarten)	\$75
1 day per week	\$135
2 days per week	\$180
3 days per week	\$225
4 days per week	\$270
5 days per week	\$315

Extra-Curricular Fees 6th Grade

6th/7th/8th grade band	\$100
<i>Spend Plan: Instructor</i>	
Basketball	\$150
<i>Spend Plan: coaches, officials and t-shirt</i>	
Cross-Country	\$70
<i>Spend Plan: coaches, officials and t-shirt</i>	
Soccer	\$120
<i>Spend Plan: coaches, officials and t-shirt</i>	
Volleyball	\$110
<i>Spend Plan: coaches, officials and t-shirt</i>	
Dances	\$10
<i>Spend Plan: tickets & refreshments</i>	

SUMMIT ACADEMY SCHOOLS, INC

Draper

May 19, 2022

TO: Summit Academy Schools, Inc Governing Board

FROM: Bucky Holmstead

SUBJECT: Honor's Diploma Adjustment

BACKGROUND INFORMATION

Recently, Summit Academy High School upped the requirements for a diploma and added two other diploma options (Honor's Diploma and AP Capstone Diploma). The Honor's diploma was created to encourage students to complete the requirements of the Regent's Scholarship while the AP Capstone was adopted to provide high rigor for our top students and give the school distinction (one of 11 schools in the state of Utah that offer it).

In 2021 Legislative Session, legislators voted to replace the Regent's Scholarship with the Opportunity Scholarship. Old language from the Regent's Scholarship still remains in each of the Summit High School Diploma options. "Lab-based" according to the Regent's scholarship meant "program approved" Biology, Chemistry, and Physics classes.

The Opportunity Scholarship is a more simplified pathway for college preparation and requires students to fill out the FAFSA, earn a 3.3 Cumulative GPA, as well as "complete" an advanced (IB, AP, and/or CE) class in the following three subjects: English, Math, and Science. No Foreign Language is required nor an additional Social Studies credit.

(Taken from <https://www.schools.utah.gov/curr/graduationrequirements?mid=1014&tid=2>)

According to [R277-700-6: High School Education Requirements](#), Science portion states:

(3 Credits)

- 2 Credits (from the four science foundation areas; Earth Systems, Biological Science, Chemistry, AP Computer Science, or Physics). *I recognize that there are five areas and the statement says four, not my typo, but the state's).*

- 1 Credit (from the foundation courses or the applied or advanced science core list).

Honor cords for graduation start at 3.5 cumulative GPA (white) and 3.75 (gold).

CURRENT CONSIDERATIONS

Approval and information by presentation.

FINANCIAL IMPLICATIONS

None.

RECOMMENDATIONS

The SAHS counseling department and administration request that the requirements for the Honor's Diploma change slightly: 3.3 Cumulative GPA be raised to a 3.5 Cumulative GPA and that the language "lab-based" terminology be removed each diploma option.

DIRECTOR'S RECOMMENDATION: Recommended Approval

Summit Academy High School Diploma Options 2022-2023

<u>Summit Diploma</u>	<u>Honors Diploma</u> (Includes Opportunity Scholarship Recommended Coursework)	<u>AP Capstone Diploma</u> (Includes Opportunity Scholarship Recommended Coursework)
English Language Arts 4.0	English Language Arts 4.0 <i>One approved advanced Language Arts</i>	English Language Arts 4.0 <i>*See AP Options</i>
Math 3.0	Math 4.0 <i>Minimum of Secondary Math 3 One approved advanced Math</i>	Math 4.0 <i>Minimum of Secondary Math 3 One approved advanced Math *See AP Options</i>
Science 3.0 <i>2.0 lab based</i>	Science 3.0 <i>2.0 lab based One approved advanced Science</i>	Science 3.0 <i>2.0 lab based *See AP Options</i>
Social Science 3.5 <i>1.0 World History 1.0 US History 0.5 US Government 0.5 Geography 0.5 Elective</i>	Social Science 3.5 <i>1.0 World History 1.0 US History 0.5 US Government 0.5 Geography 0.5 Elective</i>	Social Science 3.5 <i>1.0 World History 1.0 US History 0.5 US Government 0.5 Geography 0.5 Elective *See AP Options</i>
Physical Education/Health 2.0 <i>0.5 Health 0.5 Lifetime Fitness 0.5 Participation Skills 0.5 Elective</i>	Physical Education/Health 2.0 <i>0.5 Health 0.5 Lifetime Fitness 0.5 Participation Skills 0.5 Elective</i>	Physical Education/Health 2.0 <i>0.5 Health 0.5 Lifetime Fitness 0.5 Participation Skills 0.5 Elective</i>
Financial Literacy 0.5	Financial Literacy 0.5	Financial Literacy 0.5
Fine Arts 1.5	Fine Arts 1.5	Fine Arts 1.5 <i>*See AP Options</i>
Career and Technical Education 1.0	Career and Technical Education 1.0	Career and Technical Education 1.0
Digital Studies 0.5	Digital Studies 0.5	Digital Studies 0.5
Electives 9.0	World Language 2.0 <i>Credits must be the same language</i>	AP Seminar - Required 1.0
	Electives 6.0	AP Research - Required 1.0
		Electives 6.0
Total Required Credits 28	Total Required Credits 28	Total Required Credits 28
	Minimum GPA 3.3	<i>*AP Capstone requires six AP courses and at least a 3 on each AP exam. Seminar and Research are required courses. The remaining four are student choice.</i>
	<i>Opportunity Scholarship requires 3 advanced courses in Language Arts, Math, and Science. Please see the website below for additional information and requirements.</i>	

*For additional information and requirements for the Utah Opportunity Scholarship, please see the following website:

<https://ushe.edu/state-scholarships-aid/opportunity-scholarship/>

*The Utah State Legislature requires all students pass a basic civics test in order to receive a high school diploma.

*Recommended College Readiness courses include all Summit Diploma requirements, as well as an additional 1.0 credit of Math and 2.0 credits of World Language.

*AP Courses are listed in our course catalog

*We also offer a General Education Certificate of Completion in partnership with SLCC. Please see our concurrent enrollment coordinator for more information.

SUMMIT ACADEMY SCHOOLS, INC

Draper

May 19, 2022

TO: Summit Academy Schools, Inc Governing Board

FROM: Brad Wilkinson, Business Administrator

SUBJECT: Out of State Travel (SAHS Athletics)

BACKGROUND INFORMATION

The Summit Academy High School football team is requesting travel for a Pre-Season game in California. They have requested the cheapest option: All Points Travel which includes busing to California and back, and Hotels for their stay.

CURRENT CONSIDERATIONS

Currently UHSAA requires board approval for any Athletic trip over 150 miles away. We ask that the Summit Academy High School Governing Board review all documentation for this trip for approval.

FINANCIAL IMPLICATIONS

\$21,500

This will come from the SAHS Football account. They currently have sufficient funds through Fundraising and other fees to cover this trip.

The Down payment of \$2,000 has already been paid to secure the trip.

RECOMMENDATIONS

It is respectfully requested that the Governing Board approve the Quote/Invoice of \$21,500.00

DIRECTOR'S RECOMMENDATION: Recommended Approval.

All Points Travel

Date	Type	Reference
4/29/2022	Bill	04132022

Original Amt.
2,000.00

Balance Due
2,000.00

4/29/2022
Discount
Check Amount

Payment
2,000.00
2,000.00

General

2,000.00



☒ SAHS

Quote 1	Quote 2	Quote 3	x

2022 SAHS Football Travel Quotes

Quote #1:

Smith Coaches Buses: \$8500 divided by 50 players=
\$170 per person plus driver's hotel room and gratuity

Ayres Hotel and Suites Costa Mesa:

\$287 per night x 3 nights= \$861 divided by 4 players per room=
\$215.25 per person plus taxes and fees

Transportation and Hotel:

\$170 + 215.25= \$385.00 plus taxes and fees per person

*taxes and ~~gratu~~ gratuity is \$ 50.00 per person
total \$ 435.00*

Quote #2:

Delta Airlines: \$465.21 per person

The Hills Hotel, Laguna Hills

\$161 first night, \$176 second night, \$197 third night= \$534 for 3 nights stay divided by
4 players per room=

\$133.50 per person plus taxes and fees *10,000.-*

Transportation and Hotel:

\$598.71 per person plus taxes and fees on the hotel and bus transportation around CA

Quote #3:

All Points Travel:

Buses and Hotel for 3 nights (See quote for full details):

\$430 per person that INCLUDES taxes, fees, gratuity, etc.

Preferred

Michonne,

Quote 1

Thank you for reaching out to Smith Coaches for your luxury transportation needs. Our quote for this trip is \$8,500.00 per coach. Our coaches hold 56 passengers.

If you have any questions or concerns, please contact us.

Thank you,

Kim Smith

Smith Coaches
Charter Buses & Tours
Office (435) 472-8269

Fax (435) 472-8200
www.smithcoaches.com
smith@emerytelcom.net

On 3/29/2022 10:16 PM, BusRates.com wrote:



BusRates.com Quote Request
Notification Email

Thank you for using the BusRates.com!

Please be advised that the requestor is expecting your response within the next 2 business days, please respond to them with an indication of your intentions or with your quote.

This customer selected your company for more information regarding a group quote/reservation. Please **contact the customer directly** to follow-up:

Group Quote/Reservation Request Contact Details:

Quote Request for: Smith Coaches

38 Uintah St | Helper, Utah 84526

Name: Michonne McGovern
Group Name: Summit Academy High Football
Contact Email Address: chemcgovern@msn.com
Contact Phone Number: 8019102433
Departure Date: 08/25/2022 7:00 AM
Return Date: 08/28/2022 9:00 PM

Departure Address: Bluffdale, Utah

Destination Address: Irvine, California

Trip/Bus Details:

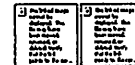
Trip Type: Round Trip

**Max Number of
Passengers:** 60

**Selected Bus
Types:** Any

Additional Info: This is a high school football team and coaches traveling to CA for a game. We would also need the bus for transportation around CA that weekend. I am on a committee of moms trying to help plan the trip and get quotes for the coaches.

BusRates.com is partnered with the United Motorcoach Association (UMA) and features over 7,000 participating Charter Bus and Group Travel listings throughout the US and Canada.



Quote ✓

From: Group JV Groups 7
Sent: Wednesday, April 6, 2022 3:28 PM
To: chemcgovern@msn.com
Subject: (KMM118187889V43296L0KM)

Case ID:40424933

Delta Air Lines Group & Specialty Sales Center
8:00AM – 8:00PM Eastern Time / Monday – Friday

FARE QUOTE
04/06/22

Dear Robert,

Unfortunately, we are only able to quote group space for 50 passengers.

This is a FARE QUOTE ONLY; the space is NOT confirmed. This fare includes all taxes and carrier-imposed fees and is NOT GUARANTEED until space is confirmed, and it is subject to availability. Please call Delta Groups and Specialty Sales at 1-800-532-4777 to process the group booking fee and book your group reservation.

A non-refundable group booking fee of \$20 per person is required at the time of booking. This fee is in addition to the normal group deposit fee associated with the booking.

Passengers: 50

Base Fare: 405.59 USD

CXR Surch: 0.00 USD, Tax/Fees: 59.62 USD, Total: 465.21 USD

> 20,279.50

> 23,240.50

25AUG 825A SLC-SNA 25AUG 921A (DL #2724 221)
28AUG 745A SNA-SLC 28AUG 1043A (DL #2195 223)

\$ 33,940.00

Once space is confirmed and the group booking fee is collected, a correspondence letter is sent detailing the terms of your agreement.

**In some cases, individual airfares may seem lower when booked online via www.delta.com; however, when checking fares for individual passengers online, the fares represent availability for individuals, not your entire group. They usually require instant purchase and are generally more restrictive. Group fares allow for more flexibility regarding the deposit, final payment, deviations and name changes.

This message (including any attachments) contains confidential information intended for a specific individual and purpose, and is protected by law. If you are not the intended recipient, you should delete this message and any disclosure, copying, or distribution of this message, or the taking of any action based on it, by you is strictly prohibited. Any personal information you provide to us is subject to the terms of our privacy policy found on delta.com. Please check [Delta Privacy Policy](#).

Thank you for your interest in DL/KL/AF Group Products.

Sincerely,

Crystal

Delta Air Lines

Group and Specialty Sales Center

This message (including any attachments) contains confidential information intended for a specific individual and purpose, and is protected by law. If you are not the intended recipient, you should delete this message and any disclosure, copying, or distribution of this message, or the taking of any action based on it, by you is strictly prohibited. See the Delta [Privacy Policy](#).

Original Message Follows: -----

From: chemcgovern@msn.com

To: ContactUs.Delta@delta.com

Subject: GSS-Sports/University Travel

Date: March 29, 2022 6:06:50 PM EDT

Delta Air Lines Group Travel Form

Group Travel Information

Group Customer: Group Coordinator/Leader

Travel Type: AdhocTravel

Group Type: Sports

SkyMiles Number: 9253790175

Country: US

Address Line 1: 13247 Woodcroft Lane

City: Herriman

State: UT

Postal Code: 84096

Customer Information

First Name: Robert
Last Name: McGovern
Email Address: chemcgovern@msn.com
Phone Country Code: 1
Phone Number: 8019102433
Phone Options: Mobile
Alternate Phone Country Code: 1
Group Coordinator First Name: Michonne
Group Coordinator Last Name: McGovern

Travel Details

Group Name: Summit Academy High Football
Group Description: Sports
Travel Region Grp: United States and Canada
Group Flight Info: Round_Trip
Number of Passenger: 70
~~**Alternate Flight Dates:** Yes~~
Nonstop: No
From: SLC
Leave: 08/25/2022
Cabin: Main Cabin
To: SNA
Return: 08/28/2022
Cabin: Main Cabin
Group Flight Info: Round_Trip

Special Requests

The boys will have football pads and helmets with them along with typical weekend baggage.

Stop Hotel Bidding

Low Price Guarantee

Modify Request

My Details

Reservation ID: 6824967
 Posted: April 25, 2022 11:06 PM CST
 Status: Active
 Event Name: Summit Academy High School
 Client Name: Michonne M
 Agent Assigned: Liz Grantham Liz.Grantham@HotelPlanner.com 1-800-898-1347 x324
 Type: Sports Team - Youth
 Itinerary: **Q Irvine, CA**
 → **Portola High School**
 August 25, 2022 (Thu) - August 28, 2022 (Sun) (3 nights)
 Paying as a Group? You may be tax exempt. [Learn More](#)

Rooms per night: 20
 Room Types: 2 Double Beds (4 People)
 (Note: Rates quoted may be slightly higher for quad occupancy)
 Star Rating Target: 3-5 Star
 Budget Range (per night): \$75.00 - \$150.00
 Space Requirements: No
 Banquet Space: No



Ayres Hotel & Suites Costa Mesa

9.53 miles from Portola High School

325 Bristol St. Costa Mesa CA 92626 [Airport] Map

★★★★★

Direct bid from the Ayres Hotel & Suites Costa Mesa. [Request a Call](#)

Offered: 04/25/2022 11:06:48 PM

Comments

Policies

Group Score

Guest Reviews

Free Parking, Free Wifi, No Resort Fees. Rate is based on single/double occupancy, \$10 each additional person up to 4 guests. We have meeting space and banquet space. Queen or two double beds. One complimentary room per 50 rooms booked per night. One suite upgrade per 50 rooms booked per night. Rate quoted is for 4 people to a room. Please Contact Me if you have any questions.

To receive an estimated \$250* free hotel voucher after this stay, follow our *Free hotel voucher instructions

Nightly Rates

08/25/2022	08/26/2022	08/27/2022
\$287.00	\$287.00	\$287.00

\$287

USD per night + 11.07% taxes

10% Off!

My Summary

New Request

Search Hotels

My Settings

Refer a Friend

FAQ

Stop Hotel Bidding

Low Price Guarantee

Modify Request

My Details

Reservation ID: 6824967
 Posted: April 25, 2022 11:06 PM CST
 Status: Active
 Event Name: Summit Academy High School ↗
 Client Name: Michonne M.
 Agent Assigned: Liz Grantham: Liz.Grantham@HotelPlanner.com 1-800-898-1347 x324
 Type: Sports Team - Youth
 Itinerary: **📍 Irvine, CA**
 → Portola High School ↗
 August 25, 2022 (Thu) - August 28, 2022 (Sun) (3 nights)
 👤 Paying as a Group? You may be tax exempt. Learn More
 Rooms per night: 20
 Room Types: 2 Double Beds (4 People)
 (Note: Rates quoted may be slightly higher for quad occupancy)
 Star Rating Target: 3-5 Star
 Budget Range (per night): \$75.00 - \$150.00
 Space Requirements: No
 Banquet Space: No



The Hills Hotel An Ascend Hotel Collection Member

5.49 miles from Portola High School

25205 La Paz Rd. Laguna Hills CA 92653 [Suburban] Map



Direct bid from the The Hills Hotel An Ascend Hotel Collection Member. 🗨 Request a Call
 Offered: 04/25/2022 11:06:48 PM

Comments

Policies

Group Score

Guest Reviews

We have an outdoor pool. We have 16 meeting rooms. Each room can be arranged individually later. Rate is for a standard room, other room types may be available. Queen or two double beds. Rate quoted is for 4 people to a room. Please Contact Me if you have any questions.

To receive an estimated \$240* free hotel voucher after this stay, follow our *Free hotel voucher instructions

Nightly Rates

08/25/2022	08/26/2022	08/27/2022
\$161.00	\$176.00	\$197.00

3220

3520

3940

= 10680.00

📞 Contact Hotel \$178

✖ Decline Bid

\$178

USD per night + 10% taxes

10% Off!

★ Quote 3

From: Corina Johnson
Sent: Wednesday, April 13, 2022 4:47 PM
To: chemcgovern@msn.com
Subject: Trip Quote - Summit Academy Football

OK! Quote for your trip. I feel great about this. Availability is bad though for both bus and hotel, so I am tentatively holding these and we need to get confirmation asap. See dates below for deposit and final payment. I need to get the bus(es) under deposit as they are tentatively holding them in good faith for me, but we have the last vehicles.

They need to decide about numbers of people.

Summit Academy Football

8/25/22 -

Depart school early morning and drive straight through to Irvine (stops, of course for food etc)
Boosted driver to complete the leg

Check-in at Hilton Garden Inn East Lake Forest
QQ rooms that can accommodate up to 4
Hot breakfast included daily

**** Rooms also accommodated next door at Hampton Inn if needed. Tentative 20 rooms possible at HGI and 10 additional at Hampton.**

3 nights hotel including tax, breakfast

Drivers room and gratuity included

Bus on call for local transportation as needed

8/28/22 -

Depart early morning for SLC
Boosted driver to complete the leg

\$430 per person quad
\$490 per person triple
\$595 per person double
\$910 per person single

**** Total invoice will be based on the number of people per room. If students are to all pay the same, you will need to internally figure how much to collect from each.**

**** 1 comp coach per 20 paid participants**

**** Min 40 / max 56 for bus #1 which can seat 56 (luggage will be tight if you fill every seat).**

**** We need min 80 / max 108 total people to keep this pricing to add 2nd bus which can seat 52. If group is less than 80 total people riding in 2 vehicles, the price person will increase.**

**** If there are coaches that are not riding the bus, we will bill as hotel only once we know how they are sharing.**

PAYMENT / CANCEL -

\$2000 deposit needed to secure space by Wed 4/30/22

... \$250 non-refundable regardless of reason for cancel

... If we hold 2 vehicles, we have until 7/13 to release one with no penalty.

Full final payment and rooming list will be due by Wed 7/13/22

... Entire trip is non-refundable as of 30 days prior to travel

HOTEL ROOMS ONLY -

We will accommodate team/coaches first and offer any remaining rooms to parents.

Stand by for this info.

Corina Johnson

All Points Travel

141 East 5600 South

suite 100

Murray, UT 84107

801-466-1101 ext 302 / 801-466-6655 fax / 800-444-9104 toll free

Join us on Facebook at All Points Travel (Utah)

Follow us on Instagram at All Points Travel

"The world is a book and those who do not travel read only a page" ~ St Augustine

**SUMMIT
ACADEMY**
HIGH SCHOOL

☒ SAHS

Administrative Approval Signature: <i>Angela Gi-</i>			
Approved Quote	Quote 1	Quote 2	Quote 3 ☒