



**Amendment Request**

**Sponsoring Charter**

American Leadership Academy  
898 West 1100 South  
Spanish Fork, UT 84660  
(801) 794-2226

**Satellite School**

American Leadership South  
364 Utah  
Santaquin, UT 84655  
(801) 754-3336

**CAO ALA**

Dr. Eric Hogenson  
(801) 368-0604

**CAO American Leadership South**

Harmony Jones  
(801) 369-1602

## AMENDMENT REQUEST FOR SATELLITE SCHOOL

### Utah State Board of Education

The Utah State Charter School Board (SCSB) is charged with recommendations for authorizing charter schools and for monitoring, evaluating, and dismissing charters of public schools in Utah. Its work is under the direct supervision of the Utah State Board of Education (USBE) per Utah Code 53A-1a-501.5. Satellite schools require authorization from the Utah State Board of Education (SBE) following recommendation from the SCSB and enrollment in satellite schools is counted against the annual charter school enrollment goal set by the Legislature.

1. Sponsoring Charter School American Leadership Academy
2. Street Address 898 West 1100 South Phone (801) 794-2226
3. City Spanish Fork
4. This is a school located in an area:  Rural  Urban
5. Chief School Officer Eric Hogenson Phone (801) 368-0604
6. The sponsoring charter school is located in which school district? Nebo School District
7. Attach a list of individuals designated to receive founder status of the sponsoring charter school and clearly indicate the percentage of students enrolled at your school for the past three years under founder preference (Attachment 1).
8. Satellite School American Leadership Academy South
9. Street Address 364 Utah Phone (801) 754-3336
10. City Santaquin
11. This is a school located in an area:  Rural  Urban
12. Chief School Officer Harmony Jones Phone (801) 369-1602
13. The satellite school is located in which school district? Nebo School District
14. List all duly elected and appointed current board members of the school (Attachment 2).

15. Percentage of minority students at sponsoring school, percentage of minority students in sponsoring school's district of residence, and estimated percentage of minority students at satellite school.

	<b>Enrolled</b>	<b>Minority</b>	<b>Percentage</b>
<b>ALA</b>	1625	424	26%
<b>District of Residence/ALA</b>	31,245	3087	13%
<b>Satellite School</b>	450	45	10%

16. 13% of students with disabilities receiving Special Education services in sponsoring school's district of residence

16% Estimated percentage of students with disabilities needing Special Education services at satellite school

17. What makes this satellite school unique or needed?

American Leadership Academy's Elementary aged student count has steadily increased since the doors opened in 2005.

The increase in this population has put a strain on our facility, both at the Secondary level, and Elementary level. Since 2005 we've added eight modular classrooms. Last year we added two at the Elementary level. There are six Elementary classrooms in the Jr. High which has pushed our 7th and 8th graders into our High School. This is a strain both socially and economically. We lease two modular units at the Elementary level for \$1,419.53 a month, which is an increase in our facility payment at the total of \$17,034.36 a year. This will not change unless we can secure another facility.

American Leadership Academy is unique in many ways. We are a revolutionary, providing students challenging, innovative, result oriented education by emphasizing academic excellence, physical well-being, character development, accountability and respect for the individual so that they are respectable citizens of their community and country. The satellite campus will offer the same programs of Leadership, Values, and Accountability to the students on that site as on the main campus site. ALA also provides an exceptional Fine Arts program at the Elementary level. Students at ALA and the satellite school will continue to be offered the same opportunity.

As we move forward as a school who is fiscally sound, academically progressing, and continuing to bring in educators with qualifications that are astounding, we will be able to offer the satellite campus the same programs and successes.

18. How will the satellite school address the needs of students with disabilities who will need Special Education services?

Teachers will address the needs of students with disabilities through the design of their lessons, instructional strategies, accommodations, and technology. Factors considered when designing lessons include: considering the demands of the classroom and the instruction, the students' needs, strengths and weaknesses, evaluation and adaptation based on feedback results, as well as, attention to areas of potential success and struggle.

Teachers will use research based instruction strategies including differentiation, cooperative learning, graphic organizers etc. Accommodations will include presentation, response, and setting accommodations. Technology includes both high and low impact technology such as computers, tablets, calculation devices, etc.

19. Written certification that the sponsoring charter school currently satisfies all requirements of state law and Board rule (Attachment 3).
20. Detailed description of governance structure for satellite school, including appointed and elected members (Attachment 4).
21. Municipality in which the satellite school will be located and general information regarding the physical facilities anticipated to serve the satellite school, as well as written certification that no later than 15 days after securing a building site, the sponsoring school's governing board shall notify the school district of the exact school location (Attachment 5).
22. Information detailing the grades to be served, the number of students to be served by grade, and ultimate enrollment figures for the satellite school (add table rows as needed).

We would like to serve grades K-8 with a cap of 450 students. The campus will be used as a K-6 campus with 7th and 8th grade students being bused to ALA for school each day.

A total of two classes per grade level will be served at the satellite sight, while 100 additional 7th and 8th grade students can attend satellite campus.

	GRADES AND SPECIFIC NUMBER OF STUDENTS SERVED BY GRADE													TOTAL NUMBER OF STUDENTS (Enrollment cap)	
	Year 1	K	1	2	3	4	5	6	7	8	9	10	11	12	
ALA South	50	50	50	50	50	50	50	50	50	50	X	X	X	X	450
Year 2	K	1	2	3	4	5	6	7	8	9	10	11	12		
ALA South	50	50	50	50	50	50	50	50	50	50	X	X	X	X	450
Year 3	K	1	2	3	4	5	6	7	8	9	10	11	12		
ALA South	50	50	50	50	50	50	50	50	50	50	X	X	X	X	450
Ultimate Enrollment	150	150	150	150	150	150	150	150	150	150	X	X	X	X	1350

23. Detailed financial plan for the satellite school for three fiscal years (Attachment 6).
24. Signed acknowledgement by sponsoring charter school governing board that they will submit any lease, lease-purchase agreement, or other contract or agreement relating to the satellite school's facilities or financing the satellite school facilities to the charter school office for review and advice prior to entering into the lease, agreement, or contract, as required in Section 53A-1a-507.9. Signed acknowledgement certifying board members' understanding that a physical site for the satellite school must be secured and under contract or appropriate permits obtained and ground breaking occurs no later than January 1 of the year the satellite school is scheduled to open (Attachment 7).
25. Evidence the entire amendment request document was received by the school district in which the sponsoring charter school is located, and the school district in which the satellite school will be located, as required in Section 53A-1a-505(1) (Attachment 8).
26. Signed acknowledgement by sponsoring charter school governing board that the board understands the satellite school shall be held accountable to its own performance agreement with the chartering entity (Attachment 9).
27. Attach sponsoring charter school's financial balance sheets and evidence of attending mandatory financial trainings (Attachment 10).
28. Attach sponsoring charter school's executive summaries from UPIPS review for the past three years (Attachment 11).
29. Create table and graph outlining sponsoring charter school's student performance on all applicable standardized assessments (e.g., DWA, end-of-level CRT, U-PASS, AYP, etc.) for past three years (Attachment 12).
30. Create table and graph outlining sponsoring charter school's authorized enrollment, fall enrollment, and student re-enrollment rates for past three years (Attachment 13).
31. Summary description of educational services, assessment, and curriculum for the satellite school - must be consistent with the services, assessment, and curriculum currently being offered at the sponsoring charter school (Attachment 14).
32. Attach comments page from the sponsoring charter school's management letter from financial audits for the past two fiscal years (Attachment 15).
33. Summary description of administration, teachers, and other staff to be hired for satellite school (Attachment 16).
34. Signed agreement by sponsoring charter school's governing board to cooperate with audits and monitoring associated with determining if the charter school fully satisfies the requirements to apply for a satellite school (Attachment 17).
35. Is the satellite schools' curriculum fully aligned with the Utah Common Core Curriculum? If not, in what areas does the school deviate from the Core?

**K-6 alignment with the Utah Common Core Curriculum:**

Envision Math, which is our math program, is aligned. Imagine It!, our reading program, is also aligned. Most teachers supplement additional activities to ensure students master Common Core standards. There are

concepts that are taught in both programs that are not aligned to the Common Core and we take them out of our regular curriculum. Teachers are familiar with the Common Core Standards and adjust the curriculum for Science and Social Studies.

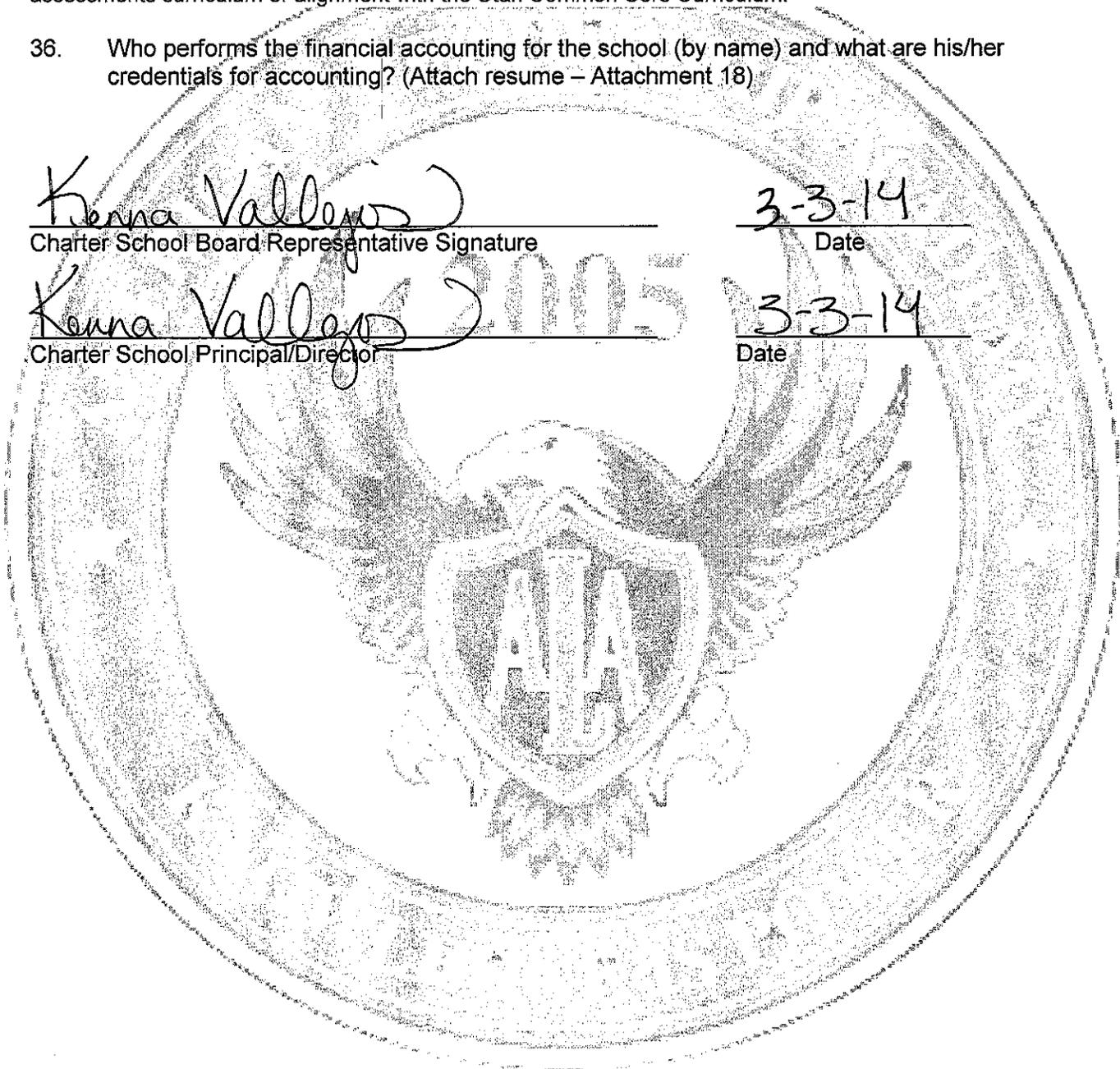
**7-12 alignment with the Utah Common Core Curriculum:**

Curriculum is designed and scaffold around Core Standards, it aligns directly.

Information was never received from the "satellite" school to provide information on their services, assessments curriculum or alignment with the Utah Common Core Curriculum.

36. Who performs the financial accounting for the school (by name) and what are his/her credentials for accounting? (Attach resume – Attachment 18)

<u>Kenna Vallojos</u>	<u>3-3-14</u>
Charter School Board Representative Signature	Date
<u>Kenna Vallojos</u>	<u>3-3-14</u>
Charter School Principal/Director	Date



## Attachment 1

Krystin Morley is the only founding board member that serves at this time.

**2011/2012:** 0.20%

**2012/2013:** 0.17%

**2013/2014:** 0.12%



## Attachment 2

### American Leadership Academy Board Members (Permanent, Elected and Appointed)

#### Permanent

Dr. Eric Hogenson, CAO

Krystin Morley, Vice Chair

Mike Hess, Treasurer

Jennifer Savage, Appointed Member

#### Elected

Scott Peterson

Mike Johnson

#### Appointed

Kate VanWagoner, Parent Council President

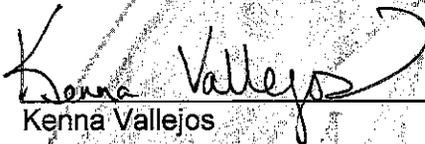


### Attachment 3

As a member of the American Leadership Academy Board of Trustees, I certify that American Leadership currently satisfies all state laws and Board rules.

By signing below, the individual understands and agrees to the aforementioned obligations.

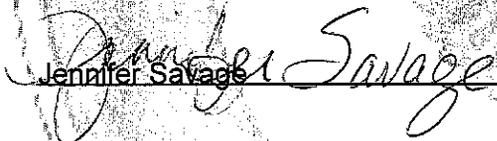
Signed:

  
Kenna Vallejos

  
Dr. Eric Hogenson

  
Krystin Morely

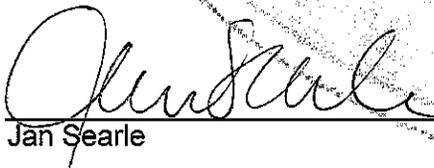
  
Mike Hess

  
Jennifer Savage

  
Scott Peterson

  
Michael C. Johnson

  
Kate VanWagoner

  
Jan Searle

## Attachment 4

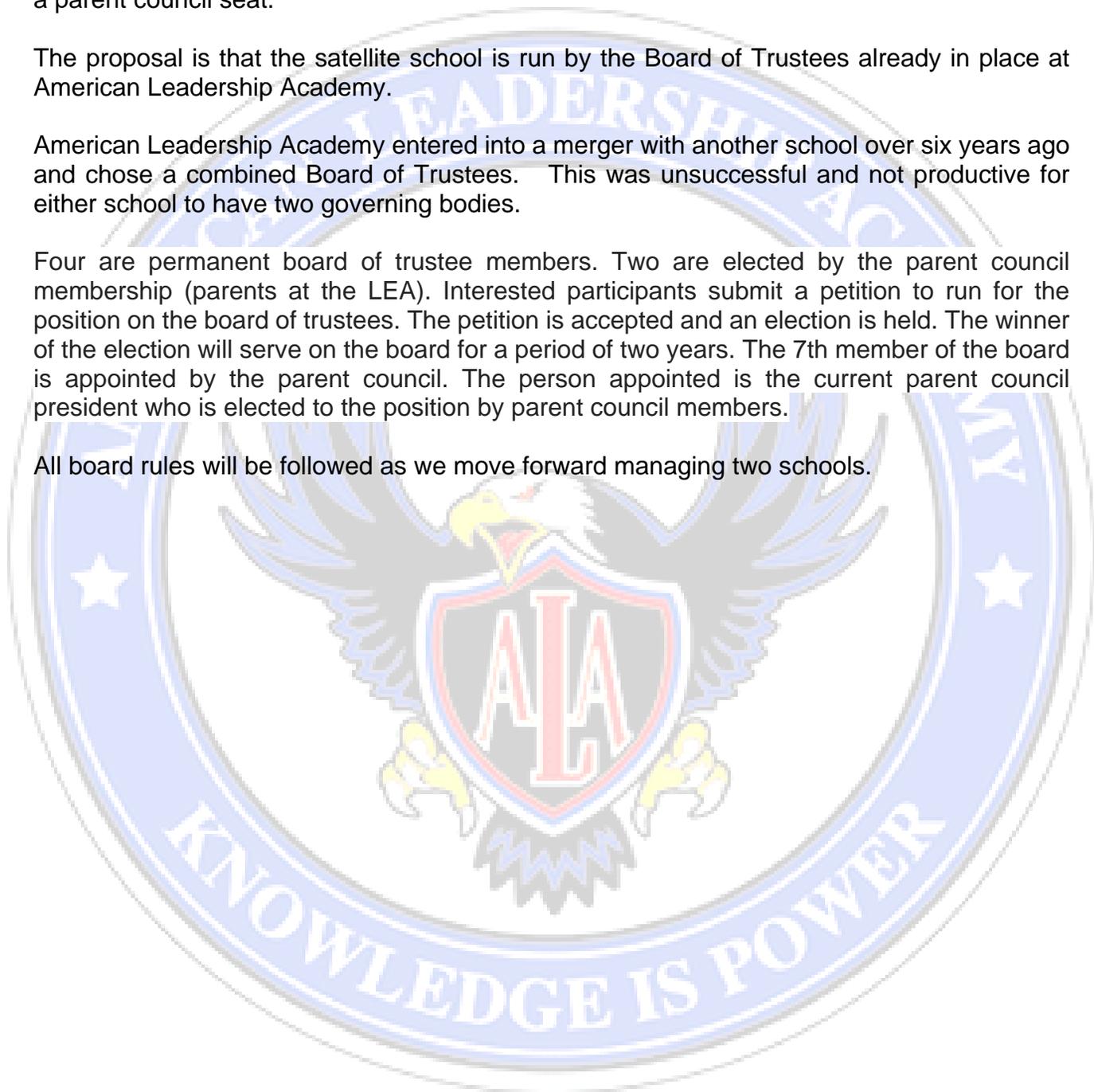
There will be a single board structure consisting of seven board members. Four are permanent members and three are elected. Two of the elected are parent seats and one is a parent council seat.

The proposal is that the satellite school is run by the Board of Trustees already in place at American Leadership Academy.

American Leadership Academy entered into a merger with another school over six years ago and chose a combined Board of Trustees. This was unsuccessful and not productive for either school to have two governing bodies.

Four are permanent board of trustee members. Two are elected by the parent council membership (parents at the LEA). Interested participants submit a petition to run for the position on the board of trustees. The petition is accepted and an election is held. The winner of the election will serve on the board for a period of two years. The 7th member of the board is appointed by the parent council. The person appointed is the current parent council president who is elected to the position by parent council members.

All board rules will be followed as we move forward managing two schools.



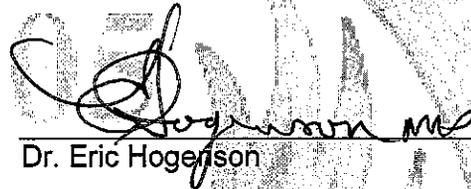
## Attachment 5

The municipality for the satellite school is in Santaquin Utah, 364 North SR 198, Utah County. The facility is 31,903 sq. ft., there are 20 classrooms, 2 modular classrooms, 1 kitchen (616 sq. ft.), 1 stage (1458 sq. ft.), 1 gymnasium (6895 sq. ft.), 1 Library (1436 sq. ft.).

American Leadership Academy certifies that no later than 15 days after securing a building site, that we will notify the sponsoring schools governing board and Nebo school district of the exact school location.

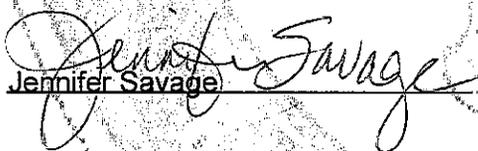
Signed:

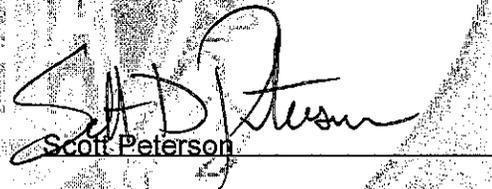
  
Kenna Vallejos

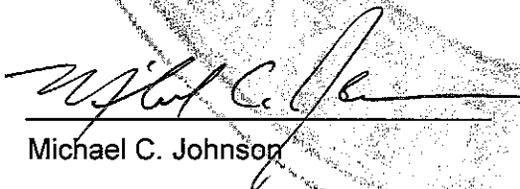
  
Dr. Eric Hogenson

  
Krystin Morely

  
Mike Hess

  
Jennifer Savage

  
Scott Peterson

  
Michael C. Johnson

  
Kate Van Wagoner

  
Jan Searle

## Attachment 6

American Leadership Academy (ALA) currently has 398 students enrolled who reside in the Payson and Santaquin area. Of those students enrolled, 203 are elementary students. ALA believes that a large majority of these students will attend American Leadership Academy South due to transportation costs. ALA has seen many students in these areas leave due to the high cost of transportation to and from the school. Included with this application are projected budgets for different enrollment numbers, ranging from 300 to 450 students.

ALA will use the current Director, Business Administrator, Human Resource manager, Testing Director, Special Ed Director and IT personnel for the satellite school. By adopting this structure already in place, ALA will see large savings in administration costs of over approximately \$200,000.00. ALA will also receive savings in Teachers' salaries as classes will be filled to max capacity of 25 students per class.

ALA South will incur additional savings by managing independently. American Leadership Academy main campus has a waiting list of 297 for the 2014/2015 school year and it is growing daily. The lottery is the 1<sup>st</sup> of April and we have no doubt that we will fill and turn away students this year if we can't acquire an additional site.

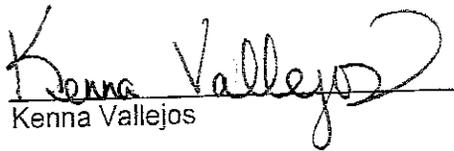
<b>AMERICAN LEADERSHIP ACADEMY SOUTH</b>	First Year	Second Year	Third Year
Number of Students	450	450	450
<b>Revenue</b>			
Local Funding	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00
State Funding	\$ 2,400,500.00	\$ 2,400,500.00	\$ 2,400,500.00
Federal Funding	\$ 270,000.00	\$ 270,000.00	\$ 270,000.00
<b>Total Revenue</b>	\$ 2,720,500.00	\$ 2,720,500.00	\$ 2,720,500.00
<b>EXPENDITURES</b>			
<b>INSTRUCTION 1000</b>			
Total SALARIES(100)	\$ 682,000.00	\$ 682,000.00	\$ 695,640.00
Total BENEFITS(200)	\$ 136,500.00	\$ 136,500.00	\$ 140,000.00
Total PURCHASED & PROFESSIONAL SERVICES(300)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Total OTHER PURCHASED SERVICES(500)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Total SUPPLIES & MATERIALS(600)	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00
Total PROPERTY(700)	\$ 25,000.00	\$ 25,000.00	\$ 30,000.00
Total DEBT & MISCELLANEOUS(800)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
<b>TOTAL INSTRUCTION</b>	\$ 887,500.00	\$ 887,500.00	\$ 909,640.00
<b>SUPPORT SERVICES - STUDENTS 2100</b>			
Total SALARIES(100)	\$ 20,000.00	\$ 20,000.00	\$ 22,000.00
Total BENEFITS(200)	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Total PURCHASED & PROFESSIONAL SERVICES(300)	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00
Total OTHER PURCHASED SERVICES (500)	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
Total SUPPLIES & MATERIALS(600)	\$ 5,000.00	\$ 5,000.00	\$ 5,500.00
Total PROPERTY(700)	\$ 15,000.00	\$ 15,000.00	\$ 20,000.00
Total DEBT & MISCELLANEOUS(800)	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
<b>TOTAL SUPPORT SERVICES - STUDENTS</b>	\$ 103,000.00	\$ 103,000.00	\$ 110,500.00
<b>SUPPORT SERVICES - INSTRUCTIONAL STAFF ASSISTANCE 2200</b>			
Total PURCHASED & PROFESSIONAL SERVICES(300)	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Total OTHER PURCHASED SERVICES(500)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Total SUPPLIES & MATERIALS(600)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Total PROPERTY(700)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Total DEBT & MISCELLANEOUS(800)	\$ 200.00	\$ 200.00	\$ 200.00
<b>TOTAL SUPPORT SERVICES - INSTRUCTIONAL STAFF ASSISTANCE</b>	\$ 10,200.00	\$ 10,200.00	\$ 10,200.00

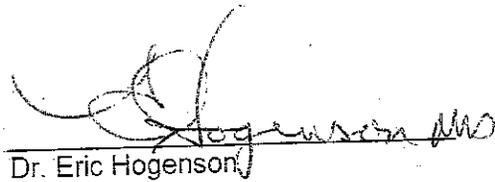
<b>SUPPORT SERVICES - GENERAL DISTRICT ADMINISTRATION 2300</b>			
Total SALARIES(100) School Board	\$ 20,000.00	\$ 20,000.00	\$ 25,000.00
Total BENEFITS(200) Satellite School Amendment Request	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Total PURCHASED & PROFESSIONAL SERVICES(300)	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
Total OTHER PURCHASED SERVICES(500)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Total SUPPLIES & MATERIALS(600)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Total PROPERTY(700)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Total DEBT & MISCELLANEOUS(800)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
<b>TOTAL SUPPORT SERVICES - GENERAL DISTRICT ADMINISTRATION</b>	<b>\$ 35,000.00</b>	<b>\$ 35,000.00</b>	<b>\$ 40,000.00</b>
<b>SUPPORT SERVICES - SCHOOL ADMINISTRATION 2400</b>			
Total SALARIES(100)	\$ 90,000.00	\$ 90,000.00	\$ 98,000.00
Total BENEFITS(200)	\$ 20,000.00	\$ 20,000.00	\$ 22,000.00
Total OTHER PURCHASED SERVICES(500)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Total SUPPLIES & MATERIALS(600)	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
Total DEBT & MISCELLANEOUS(800)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
<b>TOTAL SUPPORT SERVICES - SCHOOL ADMINISTRATION</b>	<b>\$ 124,000.00</b>	<b>\$ 124,000.00</b>	<b>\$ 134,000.00</b>
<b>SUPPORT SERVICES - Central Services 2500</b>			
Total SALARIES(100)	\$ 40,000.00	\$ 40,000.00	\$ 45,000.00
Total BENEFITS(200)	\$ 7,500.00	\$ 7,500.00	\$ 8,000.00
Total PURCHASED & PROFESSIONAL SERVICES(300)	\$ -	\$ -	\$ -
Total OTHER PURCHASED SERVICES(500)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
Total SUPPLIES & MATERIALS(600)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Total PROPERTY(700)	\$ -	\$ -	\$ -
<b>TOTAL SUPPORT SERVICES - CENTRAL SERVICES</b>	<b>\$ 50,500.00</b>	<b>\$ 50,500.00</b>	<b>\$ 56,000.00</b>
<b>OPERATION &amp; MAINTENANCE OF PLANT SERVICES 2600</b>			
Total SALARIES(100)	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00
Total BENEFITS(200)	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
Total PURCHASED & PROFESSIONAL SERVICES(300)	\$ -	\$ -	\$ -
Total PURCHASED PROPERTY SERVICES(400)	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
Total OTHER PURCHASED SERVICES(500)	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
Total SUPPLIES & MATERIALS(600)	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00
Total PROPERTY(700)	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
<b>TOTAL OPERATION &amp; MAINTENANCE OF PLANT SERVICES</b>	<b>\$ 125,000.00</b>	<b>\$ 125,000.00</b>	<b>\$ 125,000.00</b>
<b>STUDENT TRANSPORTATION SERVICES 2700</b>			
Total SALARIES(100)	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
Total BENEFITS(200)	\$ 1,500.00	\$ 1,500.00	\$ 1,500.00
Total PURCHASED PROPERTY SERVICES(400)	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00
Total OTHER PURCHASED SERVICES(500)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Total SUPPLIES & MATERIALS(600)	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00
Total PROPERTY(700)	\$ 6,900.00	\$ 6,900.00	\$ 6,900.00
<b>TOTAL STUDENT TRANSPORTATION SERVICES</b>	<b>\$ 52,400.00</b>	<b>\$ 52,400.00</b>	<b>\$ 52,400.00</b>
<b>OPERATION OF NONINSTRUCTIONAL SERVICES 3100</b>			
Total SALARIES(100)	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00
Total BENEFITS(200)	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00
Total SUPPLIES & MATERIALS(600)	\$ 97,000.00	\$ 97,000.00	\$ 97,000.00
Total PROPERTY(700)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
<b>TOTAL OPERATION OF NONINSTRUCTIONAL SERVICES</b>	<b>\$ 125,500.00</b>	<b>\$ 125,500.00</b>	<b>\$ 125,500.00</b>
<b>DEBT SERVICE 5000 (800)</b>			
<b>TOTAL DEBT SERVICE</b>	<b>\$ 457,000.00</b>	<b>\$ 457,000.00</b>	<b>\$ 457,000.00</b>
<b>TOTAL EXPENDITURES</b>	<b>\$ 1,970,100.00</b>	<b>\$ 1,970,100.00</b>	<b>\$ 2,009,740.00</b>
<b>REVENUES BY SOURCE</b>			
1000 Total LOCAL	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00
2000 Total STATE	\$ 2,400,500.00	\$ 2,400,500.00	\$ 2,400,500.00

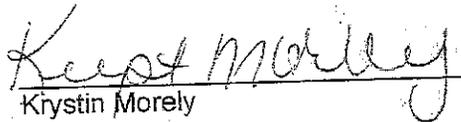
## Attachment 7

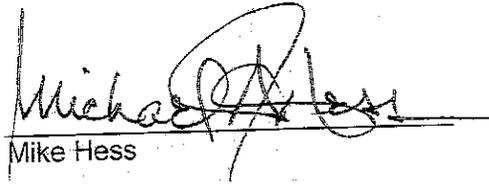
As a member of the American Leadership Academy Board of Trustees, I will submit any lease, lease-purchase agreement, or other contract or agreement relating to the satellite school's facilities or financing the satellite school facilities to the charter school office for review and advice prior to entering into the lease, agreement, or contract, as required in Section 53A-1a-507.9. By signing below, the individual understands and agrees to the aforementioned obligations.

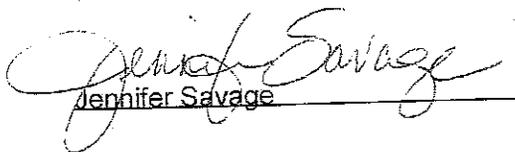
Signed:

  
Kenna Vallejos

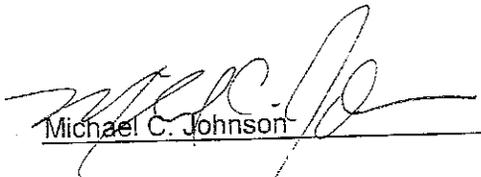
  
Dr. Eric Hogenson

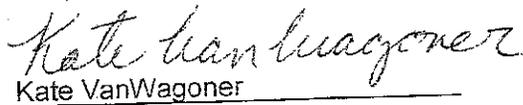
  
Krystin Morely

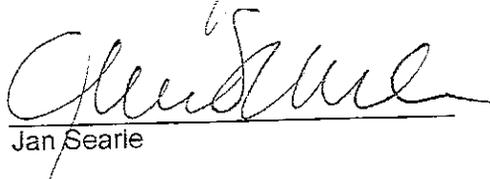
  
Mike Hess

  
Jennifer Savage

  
Scott Peterson

  
Michael C. Johnson

  
Kate VanWagoner

  
Jan Searle

## Attachment 8



American Leadership Academy Charter Amendment



Ashlyn Lewis <alewis@americanleadership.net>  
to rick.nielsen, Kenna

11:30 AM (3 minutes ago) ☆  

Superintendent Nelson,

Please review the attached files regarding American Leadership Academy.

Sincerely,

Ashlyn Lewis

2 Attachments  





February 19, 2014

Mr. Rick Nielson  
350 South Main Street  
Spanish Fork, UT 84660

Dear Superintendent Nielsen,

This letter is to inform you that American Leadership Academy is applying for a satellite school in the Nebo School District boundary. We are applying to acquire C.S. Lewis for the 2014/2015 school year as a K-8 campus. C.S. Lewis is currently holding 450 seats in the facility.

Upon acceptance of a new charter school we will begin enrolling students. I will notify you of approval or dismissal as I receive the information in the next few months.

Thank you for all you do to support our school and the community.

Sincerely,

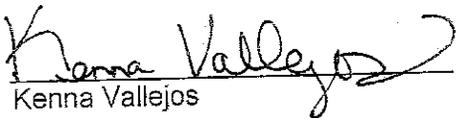
Kenna Vallejos  
Executive Director  
American Leadership Academy  
[801-884-8142](tel:801-884-8142)

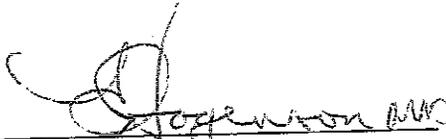
Satellite School  
C.S. Lewis  
Santaquin, Utah  
Serving 450 students  
Employment: 14 teachers, 1 admin, 2 secretaries, 14 aides, and 3 lunch staff

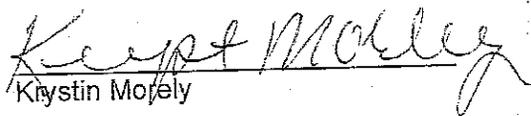
## Attachment 9

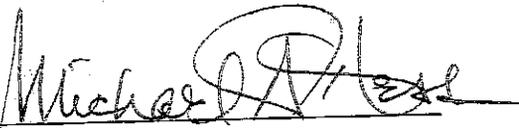
As a member of the American Leadership Academy Board of Trustees, I understand that the satellite school shall be held accountable to its own performance agreement with the chartering entity. By signing below, individuals agree to the aforementioned statement.

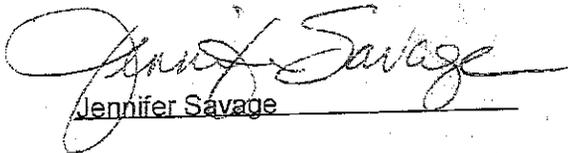
Signed:

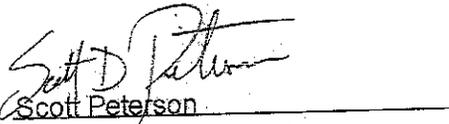
  
Kenna Vallejos

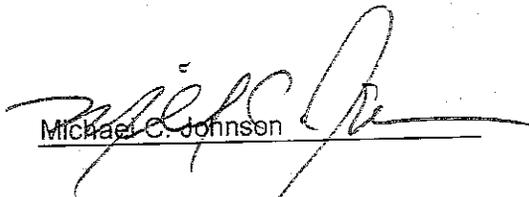
  
Dr. Eric Hogenson

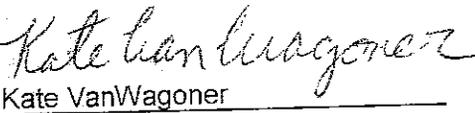
  
Krystin Morjely

  
Mike Hess

  
Jennifer Savage

  
Scott Peterson

  
Michael C. Johnson

  
Kate VanWagoner

  
Jan Searle

## Attachment 10

Jan Searle attended the Spring Finance Training on April 9, 2013 at the USOE and the Fall Finance Training on November 4, 2013 at the Utah Law and Justice building and signed in at both meetings with Jo Schmidt.

10:44 AM  
02/17/14  
Accrual Basis

### American Leadership Academy Balance Sheet As of June 30, 2013

	<u>Jun 30, 13</u>
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
8110 - Cash	
8111 - Payroll Business Checking	945,454.47
8113 - Operating Account	-206,504.34
8114 - Money Market/Savings Account	1,069,208.33
Total 8110 - Cash	<u>1,808,158.46</u>
8119 - Cash/Bond reserves	<u>2,622,527.84</u>
Total Checking/Savings	<u>4,430,686.30</u>
Other Current Assets	
8134 - Recievables Federal	57,533.93
Total Other Current Assets	<u>57,533.93</u>
Total Current Assets	<u>4,488,220.23</u>
<b>TOTAL ASSETS</b>	<b><u>4,488,220.23</u></b>
<b>LIABILITIES &amp; EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
9510 - Accounts Payable	35,767.38
Total Accounts Payable	<u>35,767.38</u>
Other Current Liabilities	
9541 - FICA & Federal Withholding	72,384.77
9544 - Utah State Withholding	12,128.37
9545 - Retirement Payable	98,288.83
9546 - Garnishments	1,681.98
9547 - Flex Spending	130.00
9548 - FUTA	-42.91
9560 - Deferred Revenue	408,528.83
9592 - Payroll Liabilities	
9592.3 - Other	668,937.30
9592 - Payroll Liabilities - Other	9,615.44
Total 9592 - Payroll Liabilities	<u>678,552.74</u>
Total Other Current Liabilities	<u>1,289,650.61</u>
Total Current Liabilities	<u>1,305,417.99</u>
Total Liabilities	1,305,417.99
Equity	
3900 - Retained Earnings	3,083,578.94
Net Income	119,225.30
Total Equity	<u>3,182,802.24</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>4,488,220.23</u></b>

## Attachment 11

### AMERICAN LEADERSHIP ACADEMY

#### School Board Members

**Dr. Eric Hogenson**

**Krystin Morley**

**Mike Hess**

**Jennifer Savage**

Scott Peterson

Mike Johnson

Kate Van Wagoner (Parent Council)

#### School Administration

Kenna Vallejos (Executive Director)

Shad Stevens (Principal High School)

Juliel Davis (Principal Jr. High)

Paul Carpenter (Principal Elementary)

Juliel Davis (Director Special Education)

Jan Searle (Business Administrator)

Kimber Tidwell (Human Resources)

#### Steering Committee

Juliel Davis (Director Special Education)

Doug Kallas (Special Education Teacher)

Lora Mitchell (Regular Education Teacher)

Jordan Garcia (Regular Education Teacher)

Bethany Chambers (Regular Education Teacher)

Kate Van Wagoner (Parent)

Connor Creighton (Student)

#### LEA Profile and General Description

American Leadership Academy is located at 898 W. 1100 S. Spanish Fork, Utah. The ALA campus consists of an elementary school, jr. high and high school. Our total enrollment is 1625 with a total of 424 minority students.

#### Mission Statement

The mission of American Leadership Academy (ALA) Charter School is to empower families and support students in grades K-12 to meet and exceed rigorous academic standards, promote life-long learning skills, and to advocate our belief that parental involvement and partnership is critical to student success. ALA is committed to providing all students with a challenging, innovative, and results-oriented education through a quality, unique method of educational reform which emphasizes academic excellence, physical well-being, character development, with accountability and respect for the individual.

## Core Beliefs

We believe it is important and essential to instill in each student, consistent with their age and grade level, an educational foundation consisting of the following:

- The ability to read, write legibly, and spell correctly.
- The ability to think analytically, reason, compute and apply in problem solving.
- The ability to express thoughts in precise, grammatically correct sentences and phrases.
- The ability to read and comprehend the classical writings of a wide range of authors.
- The ability to experience a sense of patriotism through a study of U.S. and World history and geography and to develop reverence for the sacrifice of historical figures who exemplified virtue and character.
- The ability to apply the scientific method in understanding basic concepts of earthly, biological, chemical, and physical science.
- The ability to appreciate expressions in the fine and visual arts.
- The ability to recognize the importance of overall good health and physical development and to know how to maintain a healthy, active lifestyle.
- The ability to develop a sense of self-worth through personal achievement, a willingness to sacrifice self, and service.
- The ability to develop a strong moral character through working to master the character traits of personal honesty, moral cleanliness, virtuous living, love of others, and love of self.
- The ability to realize that they are responsible and accountable for both their actions and behavior.

## Desired Results for Student Learning

### **Responsible Citizen**

Indicators:

1. Demonstrates individual initiative and personal responsibility.
2. Practices a healthy lifestyle.
3. Understands and helps promote the democratic principles of freedom, justice, and equality.

### **An Effective Communicator**

Indicators:

1. Uses appropriate methods of communication.
2. Responds appropriately to communication.
3. Reads and comprehends well.
4. Utilizes recognized writing skills.

### **A Lifelong Learner**

Indicators:

1. Initiates his or her own learning and growth.
2. Demonstrates worthwhile learning habits.
3. Develops a plan for post-secondary pursuits.
4. Interacts effectively with adults and peers.

## Self –Assessment Process with Stakeholder Input

The UPIPS Steering Committee met three times during the 2011-2012 school year to assign tasks, collect data, analyze data and discuss improvement goals and activities for American Leadership Academy. UPIPS activities were subdivided within Steering Committee and each person was assigned specific tasks to complete and deadlines for these tasks. Each individual brought their data to the committee for review and analysis. Members of the Steering Committee interviewed five parents, five students, three service providers (SLP, OT, School Counselor/Psychologist), school principal, regular education teacher, special education teacher and Director Special Education.

## Data Analysis from Self Assessment

### General Education

#### 1. What are the best things about your school's special education program?

Teachers that care, Para-educator support, well organized, on task and know the direction the students need to go.

#### 2. Child Find

##### a. Prior to a referral, what are 3 things you would do for students in your class with academic difficulties prior to referral?

Meet with student personally, discuss the root cause of the problem, move place in class, talk with parents.

##### b. 3 things for a student in your class who is experiencing social/ behavioral issues?

Personal Conference, teach expected behavior, visual cues.

##### c. What are 2 of your responsibilities when making a special education referral?

Meet with special educator, document interventions.

##### d. How have you been trained on the referral process?

Faculty trainings

##### e. Is your schools referral process working adequately? Is it timely and effective?

The Special Education referral process is working adequately. Teachers are trained on the referral process in both academic and behavioral concerns. This process is timely and effective.

### 3. Evaluation/Eligibility

#### a. Describe 2 ways in which you participate in the evaluation process.

Fill out forms on behavior or medical concerns and observations, participate in the eligibility and review of evaluations.

#### b. What is your role in the eligibility determination meeting?

Give facts about what I've observed, be part of the team.

#### 4. IEP

- a. Who are the required members of the IEP team?  
LEA, reg. ed. Teacher, parent, special education teacher
- b. Describe 2 of your responsibilities in the IEP process.  
Ask questions, report on observations, sign documentation.
- c. On a scale from 1-5, with 1 being low, how involved are you in the IEP meeting?  
4 or 5
- d. How do you coordinate/collaborate with other members of the IEP team to implement the IEP?  
Work with other teachers, work with parents, phone or email, and follow the plan for the student meeting.
- e. How are you informed of your responsibilities regarding IEP implementation?  
Through LEA, special education teachers, information from parents, confidential written information.

#### 5. U-PASS Data

- a. What are 2 ways you help the IEP team decide how a student with disabilities will participate in the U-PASS testing program? (Unless preschool, K, or over 18)  
History doesn't test CRT but in meetings I use past experience to give suggestions, observation of students in class.
- b. Describe 3 things you do for students with disabilities when statewide tests (CRTs & \ others) are administered.  
History does not participate in state wide tests, however in class I will allow verbal responses, more time, test read aloud.
- c. Describe 2 ways you have utilized data provided from U-PASS testing results.  
Look at English assessment to see how they did, give writing assessment in class. History is not CRT.

#### 6. Access to General Curriculum/LRE

- a. How does the IEP team determine the amount of special education and related services a student needs?  
Meet with team of teachers and school counselors. Related services testing gives the team information on services needed.
- b. How does the IEP team determine placement?  
Evaluations, LEA/teacher input, records of behavior, medical or academic.
- c. List 2 ways you ensure each student with disabilities participates with non-disabled peers to the maximum extent appropriate.  
Work in groups, peer support, project based.
- d. Describe your actions when a student needs instructional materials in an alternate format (e.g., Braille, large print, etc.)  
Talk to LEA, talk to parents, would order myself if necessary.

#### 7. Para-educators

- a. How is supervision and training provided for para-educators when they are assigned to your class?  
Meet to lay out how to work together, training from teacher to work in class, special education teachers.

#### 8. Student Success

- a. What is your school focusing on to improve success for all students?

Caring teachers, academics, character values, leadership.

- b. How do these activities include provisions for students with disabilities?  
Cover all learning styles, don't exclude anyone.

## 9. Professional Development

- a. How are professional development needs determined in your school or LEA?  
Through departments and then to department head meeting. Observations, board suggestions, testing scores.
- b. Who are the groups of people included in the training?  
All faculty and staff, para-educators, administration, board
- c. What professional development opportunities regarding special education are provided for you in your school or LEA?  
Always have opportunity for one on one, faculty meetings, professional development meetings from the state.

21. What additional resources and/or training is needed to improve the special education program in your school or LEA?

Training on how regular education teacher can work with special education teachers and aides in the classroom.

## Special Education Staff

The special education staff interviewed for this report was a special education teacher, occupational therapist, speech pathologist, school psychologist and special education director.

1. What are the best things about your LEA's special education program?

The special education staff felt that the teachers and para-educators in the special education department are very involved in the education of the students and are always working to make sure their needs are met. They liked the size of the program and the fact there is good communication among the faculty and staff. They also felt that the policies and procedures in place are effective and that the staff works together as a team.

2. Child Find

The staff had a strong understanding of child find, with one member having a solid understanding of child find procedures and effective ways to implement them throughout the LEA.

3. Eligibility

Every member of the staff interview knew their role on the Eligibility Team and their responsibility to contribute to the team's determination of eligibility for the student. There was a strong emphasis on parental participation in this phase of the process whether through questionnaires, interviews, consideration of previous communication such as parent teacher conference, emails, phone calls etc., or medical/emotional from outside agencies. Two of the three service providers discussed their continuing education through conferences and/or trainings in their field in order to stay current on new information.

4. IEP

Every staff member interviewed knew the IEP process, who should attend, and what their responsibilities were. All members felt that they were involved at least half of the time unless their specific area of need was being addressed, then the rates were higher. The lowest perception of involvement was by the LEA as ranked by the special education teacher. He felt that the other members of the team did more discussion in the meetings than the LEA.

5. U-PASS

The considerations used to determine which accommodations students will need during U-PASS assessments were covered completely by the special education teacher and the special education director. The related service providers listed general considerations. The area that could use further development by the team, is the utilization of UPASS data from testing results in instruction and accommodations.

#### 6. Access to General Curriculum

The special education staff felt that the LEA does a good job providing access to the general curriculum for the students receiving special education services. They understood that the student's needs are to be considered as well as their strengths and weaknesses. The special education teachers work very hard to support and even pre-teach what will be happening in the student's regular classroom so that students can feel successful in class. Para-educators develop good relationships with the regular education teachers and are welcome in classrooms to scaffold learning. All students are encouraged to participate in the academic, fine arts, athletics, debate, and any other programs available at American Leadership Academy.

#### 7. Para-educators

Para-educators were discussed by three members of the special education staff. The school psychologist and the speech therapist do not use para-educators in their work with students. Of the three who did discuss them, they related that the para-educators are trained through inservice meetings, weekly meetings with their direct supervisor and through observation. The para-educators are supervised through observation, weekly reports, and feedback from the teachers they work with.

#### 8. Student Success

Activities that focus on improving success for all students are increased parental involvement, use of engaging and effective educational technology, progress monitoring, using data to drive instruction, life skills modules, social teaching, and improved communication.

#### 9. Professional Development

Professional development needs are determined through correlation meetings, needs seen by administration, formal and informal evaluation process, departmental meetings, and Department Head meetings.

#### 10. Student Progress

Parents are given progress on their student's goals at parent teacher conferences and they include information on where the student is on their goals and accomplishments they have made. Although the teachers have given progress on goals at least as often as their non disabled peers, there was little evidence in the files that the progress had been given. The special education department is aware of this and has taken measures to ensure that evidence of progress to parents is included in the file through reports such as benchmarks and reports.

#### 11. LRBI/discipline and Safe School Data

Although the special education staff had a good understanding of when to conduct a functional behavior assessment or a behavior intervention plan, there were members of the team who did not know the requirements for conducting a Manifestation Determination.

#### 12 Transition

The special education staff realized the importance of transition for students and understood that involvement from the student and parents was key. Interest inventories, functional skill

assessments, and community based opportunities for experience are some of the methods used to determine transition services.

13.ESY

Understanding of ESY was solid with the responses discussing ability to maintain learning when away from school, critical learning period, and ability to progress.

14. Procedural Safeguards

All members of the team knew parental rights and could name at least five.

15. Rules

All members reported that inservice trainings are the most common form of receiving training on state special education rules.

16. Parent Involvement

Every member of the special education staff interviewed knew at least two ways parents are involved in the placement decisions and five areas that parents are involved in the process of determining educational needs and provision of services. They felt that parent involvement was a strength of the LEA and that each of them had positive productive relationships with parents.

21. Other resources or trainings

Trainings in autism, transition and reporting progress to parents were recommended. Space is always an issue, however the special education staff felt that more space in the elementary would help the program develop more options for students.

Principal

1. What are the best things about your school's special education program?

They absolutely care about the students and parents. They are good at their jobs and spend the time necessary to get it done.

2. Child Find.

Please describe 4 ways your school assists students who are experiencing academic and social/behavioral difficulties.

- Observe students to gather data.
- Come together to look at data and see trends.
- Gather information from teachers and what interventions they have tried.
- Consult with professionals such as counselors and reading specialists.
- Work with parents.

What are 2 of your responsibilities when a student is referred for a special education evaluation?

- Follow up on where student is in process.
- Be the LEA.
- Inform parents of concerns and referral.
- Attend meetings.

3. Evaluation and Eligibility

Who are the required members of the evaluation/eligibility team?

- Regular Ed. teacher
- Special Ed. teacher
- LEA
- Parents

Describe 2 ways in which you participate in the evaluation process.

- Give recommendations.
- Mediate/direct the meeting.
- Sign the form.
- Participate in meeting.
- Inform parents of their rights.

How does your team determine if the student's suspected disability is not due to a lack of instruction in reading and math?

- Based on data and progress trends.
- Information from teacher.
- Attendance records.

#### 4. IEP

Who are the required members of the IEP team?

- Special Ed. teacher
- LEA
- Regular Ed. teacher
- Specialists
- Parents

Describe 2 of your responsibilities in the IEP process.

- Inform parents of their rights.
- Direct the meeting and listening to parents.
- Participate.

What do you do to ensure the people implementing the IEP coordinate their efforts and services?

- Follow up.
- Through mediation.
- Make sure services are outlined before leaving meeting.

Describe your actions if a student transfers to your school with an existing IEP?

- Ask for IEP.
- Request records.
- Make sure Special Ed. and Regular Ed. teachers know.
- Recommend team meets to discuss IEP.

How are general educators and other staff who are involved with a student with a disability informed of their responsibilities?

- Through meeting.
- Responsibility of Special Ed. department.
- Follow up.

#### 5. U-PASS Data

Discuss 4 issues to consider when deciding how a student with disabilities will participate in the U-PASS testing program (s). (Unless preschool, K or over 16)

- Extra time needed.
- Read aloud.
- Reduce distractions.
- Whether they need a calculation device.

Describe 3 things you do when statewide tests (CRTs & others) are administered.

- Encourage students to be rested, attend and be well.
- Work with teachers to ensure proper instruction.
- Work with scheduling for testing.

Describe 2 ways you have utilized data provided from U-PASS testing results.

- Reviewed data for professional development ideas.
- Have grade levels collaborate using the U-Pass data to drive instruction.

#### 6. Access to General Curriculum/LRE

How does the IEP team determine the amount of special education and related services a student needs?

Based on testing and their goals and needs.

How does the IEP team determine placement?

By the least restrictive environment and the ability and success of the student to manage in the general curriculum.

List 3 ways you ensure each student with disabilities participates with non-disabled peers to the maximum extent appropriate.

Have a culture of inclusion for all students.

Teachers understand how to adapt for individuals.

High expectations for all students including those with disabilities.

What are 2 responsibilities of general educators in developing and implementing an IEP?

Be a part of the IEP team and participate.

Implement goals and accommodations from the IEP.

How do general education teachers access IEP information for students in their class?

Home room teacher is in IEP and through grade level or department meetings information is given.

We also have a network that teachers can access and see accommodations, goals, etc.

As the LEA, how do you ensure that general education teachers and related service providers access and use the information from IEPs for students with disabilities?

Ask for verbal confirmation, follow up with parents and students, observations, and training.

## 7. Para-educators

How are para-educators trained in your school?

Training for para-educators happens at beginning of year and middle of year.

Any other professional development para-educators are invited too.

How is supervision provided for para-educators when they are assigned to your school?

They are under the direction of the special ed. teachers and director.

## 8. Program Improvement

What is your school focusing on to improve success for all students?

Implement federal programs with fidelity.

Reading incentives and tracking.

Data driven instruction.

How do these activities include provisions for students with disabilities?

Accommodations to hold them accountable for what they can accomplish.

Using data to increase student levels and instruction.

What are your priorities for improving your school's special education program?

Improving the regular ed./special ed. communication, collaboration, and cooperation.

Teachers consistent with accommodations and involvement.

## 9. Professional Development

How do you determine professional development needs in your school?

Through assessment of data.

Training for programs.

New hire training.

Teacher input.

Who are the groups of people included in the training?

Administration, regular and special ed. teachers, and support staff as appropriate.

### LRB/Discipline and Safe Schools Data

When should an IEP team conduct a Functional Behavior Assessment and write a Behavior Intervention Plan?

When the student's behavioral needs are not being met and specific information is gathered to determine needs.

When a plan needs to be developed for student behavior so that the student can be successful.

When is it mandatory to conduct a manifestation determination?

Within ten school days of a decision to change placement because of discipline such as suspension.

What are 2 steps you and your team take when a student with an IEP has a behavior problem?

Check the BIP to see if it is being implemented correctly.

See if there are other circumstances causing the problem.

Describe your procedure and practice when you suspend or remove a special education student from school for more than 10 days in a school year.

Conduct a manifestation determination meeting.

Continue to provide services.

Meet with team and conduct a new behavior plan.

Who maintains disciplinary information on students with disabilities? Where are such records located?

Disciplinary information is entered by the secretaries from principal reports.

Records are kept on the student information system.

How are incidences, types, and durations of disciplinary actions, including suspensions of one day or more tracked?

Student information system.



## 11. Transition

What are 2 purposes of developing school to post-school transition plan for students with disabilities?

Help student be successful in life.

Provide support and resources for student to transition into college or career.

List 3 things the IEP team considers when developing a school to post-school transition plan.

IEP goals in areas of:

Career employment

Adult living skills

Education goals

## 12. Extended School Year (ESY)

What are 2 things you consider to determine whether a student is eligible for extended school year services?

Low retention of previous learning.

If ESY would help them maintain their skills.

## 13. Procedural Safeguards

What are 5 of the IDEA procedural safeguards or parent's rights?

Right to call an IEP meeting.

Right to be a part of the IEP team.

Right to receive procedural safeguards.

Right to confidentiality of information.

Right to due process.

## 14. Professional Development

What training have you had related to the state special education rules?

Formal college education

In services

State meetings

## 15. Parent Involvement

What are 2 ways that parents are involved in placement decisions?

Be a part of placement team.

Give consent for services.

Describe 5 areas in the overall special education process in which parents are involved in determining the educational needs and provision of services for their child.

Involved by filling out referral.

Being a part of the IEP team.

Consent for testing.

Consent for placement.

Participate in eligibility process.

## 20. IEP Meetings

How are your teachers documenting excusal or attendance not needed at IEP meetings?

Let the team know and provide information for the team to consider.

Fill out a form for nonattendance for the team.

## 21. What additional resources and/or training is needed to improve the special education program in your school or LEA?

The most critical resource we need is more appropriate space to enable our Special Ed. teachers to optimally meet the needs of our Special Ed. population. The Special Ed. teachers need training on providing progress reports to parents, as well as more training in autism and transition.

## Student Focus Group

Five students grades 1<sup>st</sup>, 3<sup>rd</sup>, 6<sup>th</sup>, 12<sup>th</sup> and 12<sup>th</sup> were surveyed for the student focus group.

1. What do you enjoy most about school?  
Hands on learning, learning subjects I like, recess, friends, track, PE, math, different experiences, meeting different people, and fun.
2. Tell me 2 things you **do not** like about school.  
It's too long, teachers that lecture, math, history, language arts, people who act superior, and sitting on the carpet for story time.
3. Have you ever attended your IEP meetings?  
The twelfth graders responded yes the others responded no.
4. What is an IEP?  
The three older students knew what an IEP was the two younger did not.
5. Who invited you to attend? How were you invited?  
The three older students responded that someone in the special education department invited them. The younger two didn't know who invited them and did not attend.
6. Who was at your IEP meeting (your parents, your teacher, the principal)?  
The older three responded:  
Parent, counselor, SPED teacher, 2 regular ed. teachers, and LEA.  
Teacher, counselor, and parent.  
Mom, principal, and SPED teacher.  
The younger two did not attend and didn't know.
7. What did people talk about at the meeting?  
The older three responded:  
Goals, progress, graduation requirements, and transition.  
Graduation  
How good I was doing.  
The younger two did not attend and didn't know.
8. What did **you** talk about at your IEP meeting?  
The older three responded:  
College and graduation.  
Finishing school and becoming an architect.  
Nothing.  
The younger two did not attend and didn't know.
9. What kinds of additional help, accommodations, or specialized instruction do you receive in school?  
In class extra time, calculation device, help with math and reading, pull out, extra time, specialized pullout help, pullout, and extra time.
10. How has special education helped you?  
Extra time and help.  
Helped me learn math.  
Help understand.  
Help finishing education, providing someone to help me.  
Help me with my work.
11. Did you bring anyone with you to your IEP meeting? Who did you bring?

Parents  
Parents

12 Did someone tell you about your rights as a student who has reached the age of majority?

The two students who are of age to receive age of majority did say that they had received it and knew their rights. One responded that he had received a notice of meeting and notice of action, both signed their IEP and other forms.

13 Which school activities do you participate in?

None  
Fine arts

14. Is there anything else you would like to discuss about your school experiences?

None of the students had a response.

### Parent Focus Group

Five parents were interviewed for the parent focus group. Two of the parents had students who had transition plans. None of the parents had students that were in the age group 3-5.

### Procedural Safeguards

Were your procedural safeguards (parent's rights) explained so that you understood them?

100% of those polled answered positive.

### Evaluation and Eligibility

Did you have the opportunity to provide input during your child's evaluation?

100% of those polled answered positive.

Did the evaluation team listen to and consider your input?

100% of those polled answered positive.

### IEP Development

Was the IEP meeting scheduled at a mutually agreeable time?

100% of those polled answered positive.

Did your child's general education teacher attend the IEP meeting?

100% of those polled answered positive.

Did the principal or his/her representative attend the IEP meeting?

80% of those polled answered positive.

Did the team ask for and use your input on goals for your child's IEP?

100% of those polled answered positive.

Were all of your child's needs were addressed during the IEP meeting?

100% of those polled answered positive.

At your child's IEP meeting, did the IEP team discuss classroom accommodations and modifications your child needs?

100% of those polled answered positive.

### IEP Implementation

Are your child's general education teachers aware of your child's learning needs?

100% of those polled answered positive.

Does the staff in the general classroom consistently provide the accommodations and modifications written in your child's IEP?

100% of those polled answered positive.

Do your child's general education and special education teacher's work together to implement the IEP?

100% of those polled answered positive.

Is your child getting all of the services listed on the IEP?

100% of those polled answered positive.

Is your child making progress towards meeting the goals on his/her IEP?

100% of those polled answered positive.

#### Transition (School to Post-School)

If your child is 15 years old or older, did the IEP team discuss transition services (e.g. career interests, employment, high school classes)?

100% of the two who had students 15 and older answered positive.

Do you understand your child's graduation requirements?

100% of those polled answered positive.

#### Transition (Early Childhood)

If your child is 3-5 years old, do you feel that his/her preschool experience has been beneficial?

N/A

#### General

Does the school facilitate opportunities for you to provide input about your child's education other than at the IEP meetings?

100% of those polled answered positive.

Does your school encourage your involvement as a means of improving services and results for your child with disabilities?

100% of those polled answered positive.

Discuss the strengths of your student's special education program.

Appreciate the department's availability, communication, and how they "slow up".

Her teacher is very specific in addressing her needs.

Accommodations are successful without being demoralizing.

We like the separation or pullout for math.

The help provided and the support.

Discuss and suggest any area of improvement for the special education program in your charter school/school district.

Communication

Couldn't think of any. Very pleased.

See more input from regular education.

Do you have any other questions or issues you would like to discuss?

All of the parents answered no.

## B. UIPS File Review (2011-2012 School Year Summary)

Demographics of files reviewed

American Leadership Academy K-12 – 24 Files reviewed (11.32% of Special education population)

Specific Learning Disabled-9 (38%)  
Emotional Disturbance-1 (4%)  
Speech/Language Impairment-3 (13%)  
Other Health Impairment-2 (8%)  
Autism-3 (13%)  
Development Delay-2 (8%)  
Intellectually Disabled-2 (8%)  
Orthopedic-1 (4%)

Caucasian-22 (92%)  
African American-0 (0%)  
Hispanic-2 (8%)  
Native American-0 (0%)  
Pacific Islander- (0%)  
2 or More-0 (0%)

We have 5 Mild/Moderate Special Education teachers with an average caseload of 26.4 each.  
We have 2 Moderate/Severe Special Education teachers with an average caseload of 16.5 each.

## General Supervision

### Areas of Strength

The Special Education department is fully staffed and trained with seven Highly Qualified teachers, a Special Education Director, and 17 para-educators. Teachers attend collaboration meetings every week within their own department as well as with other grade levels and secondary departments. Both the elementary and the secondary special education teachers have a representative in the Facilitator/Department Head meetings that happen weekly with the principals of the respective schools. This representative is an active participant in the meetings to provide insight on how special education can provide support for the students and teachers as well as being a part of the decision making process in general.

This year we are utilizing greater interactive and project based learning for our students. We use technology, projects, and activities to increase academic and social skills as well as solidifying the information the students are learning. We are very aware of the importance of tying learning to real life so that there is relevance and permanence for the students.

The general consensus from those interviewed, including those on the steering committee, was that the special education staff is very positive in their interactions with students, they communicate well with other teachers, parents and students, they are respectful of all students, they are generous with their ideas on how to reach all learners, they are organized and knowledgeable.

### Areas of Needed Improvement

The greatest need is training on eligibility criteria for classifications. Boxes were not marked or information was missing on the forms.

The other need expressed was for more space for special education in the elementary.

### Areas Not in Compliance

<b>11a) Reevaluation: Review of Existing Data</b>	84.6%
<b>13) Initial/Reevaluation Completed Prior to Consent (Not computing correctly in the system)</b>	12.5%
<b>20) Current Eligibility Determination</b>	84.6%
<b>23a) Evaluation Summary Report Based on Data</b>	95.8%
<b>23b) Eligibility Determination Document Identifies Eligibility</b>	87.5%
<b>25) Variety of Assessments Used to Determine Eligibility</b>	95.8%
<b>28) Lack of Reading/Math Instruction Primary Factor in Determining Eligibility</b>	95.8%
<b>29) LEP Primary Factor in Determining Eligibility</b>	95.8%
<b>30) Autism: Eligibility Criteria</b>	33.3%
<b>30) Specific Learning Disability (Combination): Eligibility Criteria</b>	50.0%
<b>31) Developmental Delay: Evaluation Criteria</b>	50.0%
<b>31) Intellectual Disability: Evaluation Criteria</b>	50.0%
<b>31) Specific Learning Disability (Discrepancy Analysis): Evaluation Criteria</b>	62.5%
<b>31) Specific Learning Disability (Combination): Evaluation Criteria (2 files reviewed)</b>	0.0%
<b>31) Speech Language Impairment: Evaluation Criteria</b>	66.7%

### FAPE in the LRE

#### Areas of Strength

American Leadership Academy had full compliance in IEPs being current, participation by all team members, inclusion of PLAAFP, placement and participation with general education.

#### Areas of Needed Improvement

Provide training for including data and progress in the general curriculum in the PLAAFP, completing measurable goals, and diligence in considering and completing every section of the IEP and placement.

#### Areas Not in Compliance

<b>39c) IEP Timeline Requirement</b>	81.0%
<b>44b) IEP Team Participation: Student</b>	92.3%
<b>45a) PLAAFP: Includes Data</b>	79.2%
<b>45b) PLAAFP: Progress in General Curriculum</b>	79.2%
<b>46a) Goal Addresses Educational Need</b>	91.7%
<b>46b.1) Measurable Goal: Condition</b>	75.0%
<b>46b.3) Measurable Goal: Criterion</b>	75.0%
<b>46e) Description of When Reports Provided to Parents</b>	95.8%
<b>48a) Related Services: Address Student Needs</b>	90.9%
<b>49c) Program Modifications/Supports for School Personnel and/or Supplementary Aids/Services: Frequency</b>	92.9%
<b>51) Participation in State/Districtwide Assessments: Criterion-Referenced Tests (CRT), Language Arts</b>	92.3%
<b>52) Participation in State/District wide Assessments: Criterion-Referenced Test (CRT) for Math</b>	92.3%
<b>53) Participation in State/Districtwide Assessments: Criterion-Referenced Tests (CRT) Scien</b>	90.9%
<b>54) Participation in State/Districtwide Assessments: Direct Writing Assessment</b>	66.7%

<b>57) Participation in State/Districtwide Assessments: LEA Test</b>	80.0%
<b>61) Special Factors: Language Communication Needs</b>	95.8%
<b>65a) Extended School Year: Written Prior Notice(1 file reviewed)</b>	0.0%
<b>72a) Reason for Rejection of Placement Options</b>	70.8%

## Transition

### Areas of Strength

For students who are of transition age we offer a Community Based Transition Unit, where students volunteer for experience out in the community. We have students working at the local library, auto detailing, grocery store, café, and a western supply store. We conduct a survey at the end of each quarter and for the year 2011-2012 the students have received high marks for their work at these companies every quarter.

### Areas of Needed Improvement

Provide training on proper completion of Transition forms with full information, updating every year and providing resources for parents and students to utilize.

### Areas Not in Compliance

<b>9d) Consent for Initial Placement in Parent's Native Language (1 file reviewed)</b>	0.0%
<b>21) Notice of Meeting for Eligibility Determination</b>	81.8%
<b>24a.1) Initial Eligibility: Evaluation Summary Report Provided to Parent</b>	72.7%
<b>24b.1) Reevaluation Eligibility: Evaluation Summary Report Provided to Parent</b>	92.3%
<b>27) Eligibility Determination Documentation Provided to Parents</b>	87.5%
<b>40) Notice of IEP Meeting</b>	95.8%
<b>46f) Evidence of Progress Reports Provided to Parents</b>	35.0%
<b>68a) Notice of Meeting for Initial Placement</b>	81.8%

## Parent Involvement

### Areas of Strength

Parents felt that they were provided opportunities to give input during their child's evaluation, during the IEP meeting and throughout the year other than during meetings. The parents felt comfortable expressing any ideas they had for their child and felt that the special education department listened to them. They believe that the general education is aware of their child's learning needs and that their child is getting their accommodations and modifications, as well as their services.

### Areas of Needed Improvement

Provide training for teachers and create a system to provide progress reports to parents on their child's progress on goals.

Provide training on providing parents with their copies of Eligibility and Evaluation Summary forms and forms in their native language.

### Areas Not in Compliance

<b>74b) Annual Review of Transition Plan</b>	60.0%
<b>76) Secondary Transition: Measurable Postsecondary Goals</b>	0.0%
<b>78) Transition Services: Education/Instruction</b>	71.4%
<b>78a) Transition Services: (Education/Instruction) Provided or Paid by Other Agency</b>	80.0%
<b>79) Transition Services: Career/Employment</b>	85.7%
<b>80) Transition Services: Community Experiences</b>	85.7%
<b>81) Transition Services: Post-school Adult Living Objectives</b>	85.7%
<b>82) Transition: Course of Study</b>	57.1%

## Analysis of Student Outcome Data

### Student Achievement (Indicator 3)

Students with disabilities at American Leadership Academy increased their CRT assessment scores for the 2011-2012 school year by 9% in Language Arts from the previous year and increased their math scores by 18% from the previous school year.

According to 2011-2012 school year DIBLES benchmark testing comprising K-3 grades, Kindergarten showed a 6% improvement over the previous year at 70%, First grade showed a 1% gain over the previous year at 94%, Second grade had an 8% gain at 70%, and Third grade showed a 5% gain at 75%.

### Disproportionality

American Leadership Academy does not have disproportionality.

### Graduation Rates

The 2010-2011 graduation rate at American Leadership Academy for Students with Disabilities is 99%. This is up 3% from the 2009-2010 school year which was 96%.

### Off-Site Analysis Data

All forms are in compliance with state and federal regulations as per USOE letter dated 4/5/2012. Forms are frequently updated and maintained to ensure compliance with state and federal regulations.

### Child Find

All child find activities are in compliance with state and federal regulations as per USOE letter dated 4/5/2012. We continue to train faculty and staff on child find through meetings and distribution of information.

### Identification and Evaluation

Identification and Evaluation forms and materials are in compliance with state and federal regulations as per USOE letter dated 4/5/2012. We are currently increasing our assessment materials to include more assessments for Pervasive Developmental Disorders.

### Personnel

American Leadership Academy has seven fulltime teachers with three elementary teachers and four secondary teachers. We have 17 para-educators, three part-time speech pathologists (contracted working 1/3 each), one OT (contracted for 1/5), one school counselor (contracted 3/5), and one special education director- full time.

All are current with their licenses and requirements with the state. American Leadership Academy provides training and support for all staff members throughout the school year.

### Private Schools

American Leadership Academy is a charter school and is not required to contact and consult with private schools. We are in compliance with state and federal regulations as per USOE letter dated 4/5/2012.

### Information Previously Submitted to the USOE

All required federal and state reports have been submitted and approved as per USOE letter dated 4/5/2012.



Utah Program Improvement Planning System  
for Special Education



Utah State Office of Education  
250 East 500 South  
P.O. Box 144200  
Salt Lake City, Utah 84114-4200

## PROGRAM IMPROVEMENT PLAN

LEA: American Leadership Academy

LEA Contact: Juliel Davis

Date Submitted: June 27, 2013

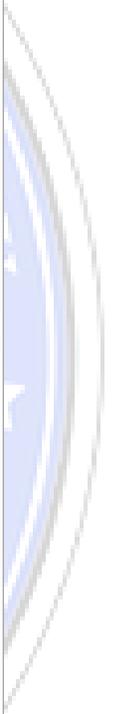
- Program Areas:
- General Supervision
  - Parent Involvement
  - FAPE in the LRE
  - Transition
  - Disproportionality

Program Areas	APR/SPP Indicator	Goal(s)	Action Step(s)	Timeline	Evaluation Method
General Supervision	11, 15-20	<ol style="list-style-type: none"> <li>1. The LEA will continue to review evaluation summary report for evidence of proper use of data in determining eligibility for each of the classifications under IDEA and retrain if necessary.</li> <li>2. The LEA will continue to review for evidence of proper use of existing data to ensure that previous data has been reviewed with input from all members of the team and will retrain if necessary.</li> </ol>	<ol style="list-style-type: none"> <li>1. The LEA will arrange continued training in eligibility determination criteria and evaluation summary report with proper use of data in determining eligibility.</li> <li>2. The LEA will arrange for continued training in reviewing existing data with emphasis on data to review, determining need to reassess and methods of gathering data to review.</li> </ol>	<p>October 2013</p> <p>October 2013</p>	<p>Two files with newly completed eligibility determination and evaluation summaries will be reviewed monthly by the special education director.</p> <p>Two files with newly completed review of existing data forms will be reviewed monthly by the special education director.</p>

Last Updated: October 2010

Program Areas	APR/SPP Indicator	Goal(s)	Action Step(s)	Timeline	Evaluation Method
Parental Involvement	8	<ol style="list-style-type: none"> <li>1. LEA will ensure that progress on goals are provided to parents of students receiving special education services.</li> <li>2. LEA will ensure that parents are provided a copy of the evaluation summary reports for initial or re-evaluation as well as eligibility.</li> <li>3. LEA will review with staff providing Notice of meeting for IEP meeting, Initial Placement meeting and Eligibility Determination meeting.</li> </ol>	<ol style="list-style-type: none"> <li>1. Ensure progress reports are sent home at least as often as regular education students receive progress reports.</li> <li>2. Evaluation Summary Reports for initial or re-evaluation the LEA will be provided to the parent at every Initial or Re-evaluation meeting.</li> <li>3. LEA will review with staff procedures for Notice of Meeting and provide extra staff if necessary to provide notice to parents and guardians.</li> </ol>	<p>End of term all four terms.</p> <p>November 2013</p> <p>December 2013</p>	<p>Three files will be randomly selected two weeks after the term ends to ensure documentation of progress provided to parents.</p> <p>Two files with newly completed eligibility determination and evaluation summaries will be reviewed monthly by the special education director for documentation parents received report.</p> <p>The special education director will review 1 files a month for evidence that Notice of Meeting was provided to parents.</p>

Revised October 1, 2010



Program Areas	APR/SP Indicator	Goal(s)	Action Step(s)	Timeline	Evaluation Method
FAPE in the LRE	1-3, 5-7	<ol style="list-style-type: none"> <li>The LEA will review with faculty accurately constructing a PLAFFP including data and progress in the general curriculum.</li> <li>The LEA will include goals that address the students educational need, are measurable and contain the condition and criterion.</li> <li>The LEA will include program modifications and supports, participation in state wide assessments and consideration of special factors.</li> </ol>	<ol style="list-style-type: none"> <li>The LEA will review with faculty in department meetings construction of PLAFFP.</li> <li>The LEA will provide in-service on writing goals that include students educational need, are measurable and contain the condition and criterion.</li> <li>The LEA will review with faculty during department meeting program modifications and supports, participation in state wide assessments and consideration of special factors.</li> </ol>	<p>September 2013</p> <p>October 2013</p> <p>November 2013</p>	<ol style="list-style-type: none"> <li>The special education director will review 1 file a month for proper use of data and progress in the general curriculum.</li> <li>The special education director will review 1 file a month for goals that include students educational need, are measurable and contain the condition and criterion.</li> <li>The special education director will review 1 file a month for evidence of program modifications and supports, participation in state wide assessments and consideration of special factors.</li> </ol>

Revised October 1, 2010

Program Areas	APR/SPP Indicator	Goal(s)	Action Step(s)	Timeline	Evaluation Method
Transition	12-14	<ol style="list-style-type: none"> <li>The LEA will annually review student transition plan and include measurable post-secondary goals, services in education, career, community, adult living, course of study and services by other agencies if applicable.</li> <li>LEA will inform students and parents of Transfer of rights.</li> </ol>	<ol style="list-style-type: none"> <li>The LEA will review with faculty procedures on include measurable post-secondary goals, services in education, career, community, adult living, course of study and services by other agencies if applicable when reviewing the transition plan yearly.</li> <li>The LEA will review with faculty the procedures for informing parents of Transfer of Rights.</li> </ol>	<p>November 2012</p> <p>September 2013</p>	<ol style="list-style-type: none"> <li>The special education director will review 1 file a month for evidence of annual review of transition plan, measurable post-secondary goals, services in education, career, community, adult living, course of study and services by other agencies if applicable.</li> <li>The special education director will review 1 file a month for evidence of Transfer of rights.</li> </ol>
Disproportionality	9-10	NA	NA	NA	NA

Revised October 1, 2010

## Attachment 12

### 2009-10 Direct Writing Assessment (DWA) Results for AMERICAN LEADERSHIP ACADEMY

	DWA 6th		DWA 9th	
	Total Tests	% Prof	Total Tests	% Prof
<b>All Students</b>	<b>94</b>	<b>73%</b>	<b>139</b>	<b>86%</b>
African American	1	100%		
American Indian	1	100%	2	100%
Asian			1	100%
Hispanic	7	71%	13	92%
Pacific Islander	1	0%		
White	84	74%	123	85%
Female	44	73%	75	89%
Male	50	74%	64	83%
Not ELL	94	73%	139	86%
Econ Disadv	28	68%	36	83%
Not Econ Dis	66	76%	103	87%
Not SWD	77	79%	119	92%
SWD	11	64%	11	55%
SWD W/ACC	6	17%	9	44%

**2010-11 Direct Writing Assessment  
 (DWA) Results for AMERICAN  
 LEADERSHIP ACADEMY**

	DWA 5th		DWA 8th	
	Total Tests	% Prof	Total Tests	% Prof
<b>All Students</b>	<b>97</b>	<b>84%</b>	<b>141</b>	<b>65%</b>
African American	1	100%	4	75%
American Indian			2	50%
Hispanic	11	91%	12	50%
Pacific Islander			2	50%
White	85	82%	121	67%
Female	47	83%	63	79%
Male	50	84%	78	54%
Not ELL	97	84%	141	65%
Econ Disadv	32	81%	42	52%
Not Econ Dis	65	85%	99	71%
Not SWD	82	85%	115	72%
SWD	5	100%	8	50%
SWD W/ACC	10	60%	18	28%

### 2011-12 Direct Writing Assessment (DWA) Results for AMERICAN LEADERSHIP ACADEMY

	DWA 5th		DWA 8th	
	Total Tests	% Prof	Total Tests	% Prof
<b>All Students</b>	<b>98</b>	<b>84%</b>	<b>141</b>	<b>52%</b>
African American	4	75%	1	100%
American Indian			2	100%
Asian	1	100%		
Hispanic	11	82%	13	31%
Pacific Islander	3	67%	2	100%
White	79	85%	123	52%
Female	51	90%	75	64%
Male	47	77%	66	38%
Not ELL	98	84%	141	52%
Econ Disadv	28	82%	52	44%
Not Econ Dis	70	84%	89	56%
Not SWD	78	92%	123	56%
SWD	8	75%	5	60%
SWD W/ACC	12	33%	13	8%

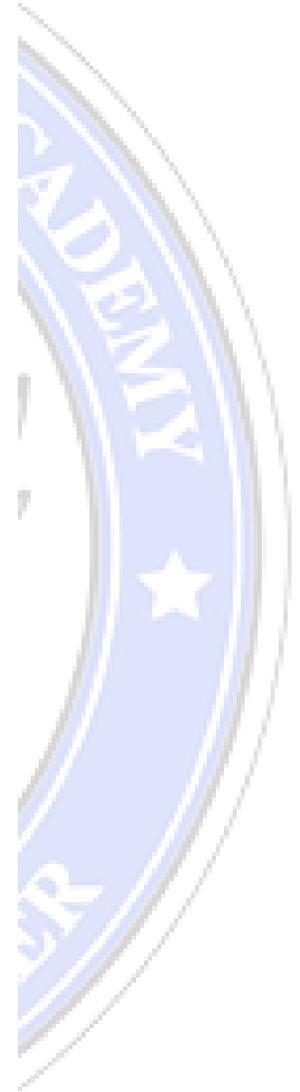
**2012-13 Direct Writing Assessment  
 (DWA) Results for AMERICAN  
 LEADERSHIP ACADEMY**

	DWA 5th		DWA 8th	
	Total Tests	% Prof	Total Tests	% Prof
<b>All Students</b>	<b>116</b>	<b>78%</b>	<b>146</b>	<b>69%</b>
African American	6	100%	2	50%
American Indian	1	100%	1	100%
Asian			3	100%
Hispanic	15	60%	15	60%
Multiple Races	1	0%	2	100%
Pacific Islander			2	100%
White	93	80%	121	69%
Female	51	84%	80	75%
Male	65	72%	66	62%
ELL	3	67%	4	25%
Not ELL	113	78%	142	70%
Econ Disadv	39	77%	57	61%
Not Econ Dis	77	78%	89	74%
Not SWD	94	84%	122	78%
SWD	22	50%	24	25%



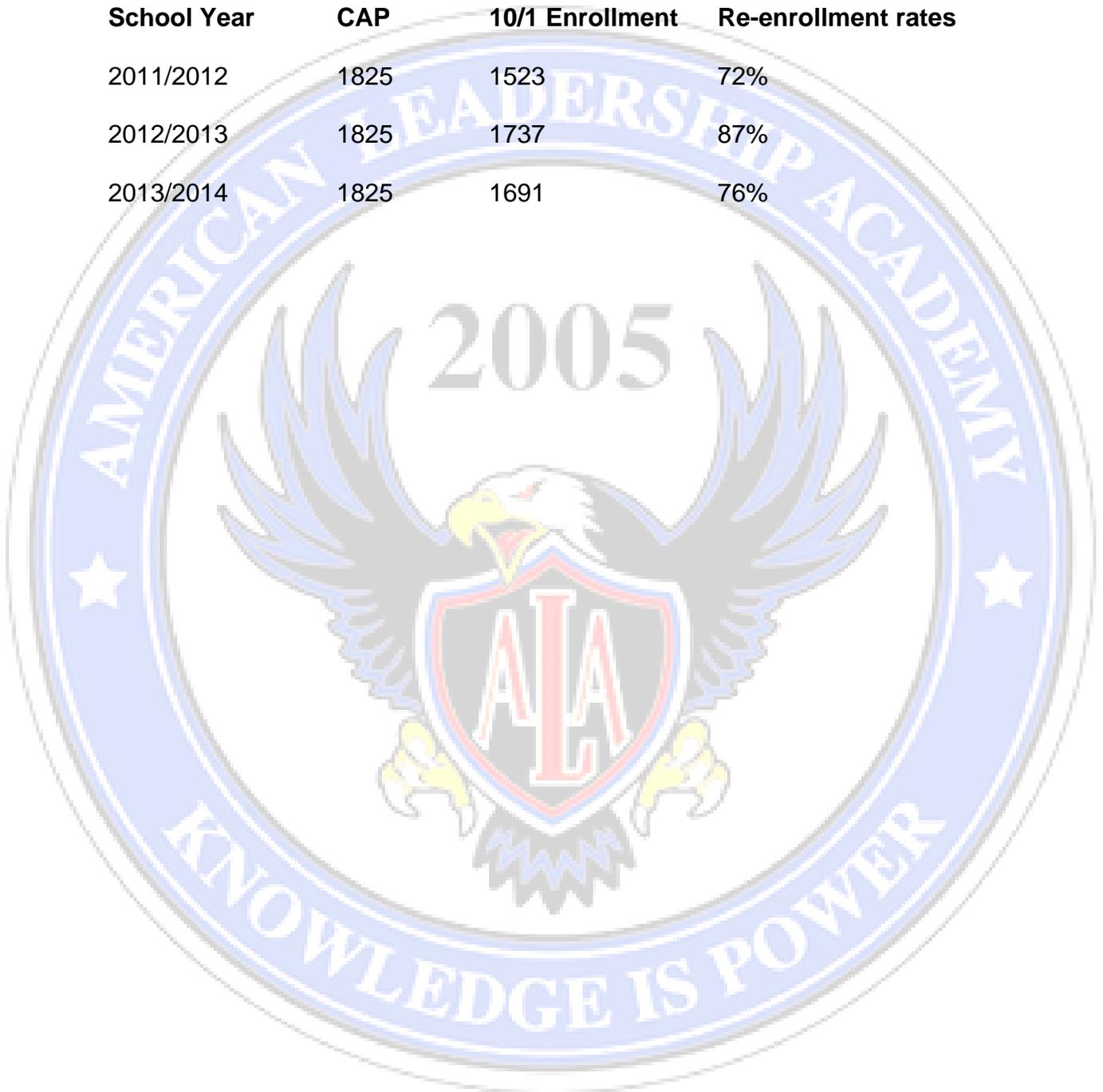
American Leadership Academy Annual Report Card 2012-13																		
Language Arts					Mathematics					Science								
% of students proficient	2009	2010	2011	2012	2013	% of students proficient	2009	2010	2011	2012	2013	% of students proficient	2009	2010	2011	2012	2013	
	Utah	Utah	Utah	Utah	Utah		Utah	Utah	Utah	Utah	Utah		Utah	Utah	Utah	Utah	Utah	Utah
School Wide	79	80	83	83	84	84	59	57	62	57	66	73	64	64	66	64	67	73
Economically Disadvantage	70	72	78	75	75	74	48	50	52	47	62	63	51	55	52	50	56	59
With Disabilities	44	47	60	62	55	55	30	32	40	31	35	48	33	36	48	37	38	46
Hispanic	66	60	68	64	70	68	29	41	39	38	49	55	38	31	38	33	43	48

All Data shown is gathered from student performance from the CRTs (Criterion Reference Tests) administered at the end of the year. Grades 3-12 participate in these assessments every year. The goal at ALA is to improve every year, identify areas of concern, and focus our efforts on those under-performing subjects/programs.



## Attachment 13

School Year	CAP	10/1 Enrollment	Re-enrollment rates
2011/2012	1825	1523	72%
2012/2013	1825	1737	87%
2013/2014	1825	1691	76%



## Attachment 14

### **Summary of Educational Services used for K-6**

Title I, SPED, ESL, Speech, OTC

### **Summary of Educational Services 7-8**

SPED, ESL, Speech, Occupational Therapy, Math Lab, Science Lab

### **Summary of Educational Services 9-12**

SPED, ESL, Speech, Occupational Therapy, Math Lab, Science Lab, AP Courses, Concurrent Enrollment Courses and EdNet (Distance Learning), access to the MATC

### **Summary of Assessments Used K-6:**

DIBELS, Benchmark testing for Imagine It Reading Program, Envision Math Placement Test, CRTs, DWA (5th grade)

### **Summary of Assessments Used 7-8**

Classroom based assessments formative and summative, CRT, AIMS Web, UALPA

### **Summary of Assessments Used 9-12**

Classroom based assessments formative and summative, CRT, AIMS Web, UALPA, ACT

### **Summary of Curriculum K-6:**

Envision Math, Imagine It Reading, Dual Immersion Spanish Program, Core Knowledge History, Social Studies and limited Science.

### **Summary of Curriculum 7-8**

Math Curriculum Big Ideas and teacher directed support based on the common core.

English curriculum based on the Utah Core standards and the materials (texts) suggested for the Core Knowledge Sequence. Values and character based lessons as part of literary theme in addition to literature, composition, and grammar structure.

### **Summary of Curriculum 9-12**

Math curriculum 9-10 MVP, additional math courses fully aligned with state core. All other departments align their curriculum to state standards.

## Attachment 15



**AMERICAN LEADERSHIP ACADEMY,  
INCORPORATED** COMMUNICATION TO THOSE  
CHARGED WITH GOVERNANCE  
**YEAR ENDED JUNE 30, 2013**



## Communication with Those Charged with Governance

To the Board of Directors  
American Leadership Academy, Incorporated

We have audited the financial statements of American Leadership Academy, Incorporated (the School) for the year ended June 30, 2013, and have issued our report thereon dated November 8, 2013. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated July 26, 2013. Professional standards also require that we communicate to you the following information related to our audit.

### **Significant Audit Findings**

See attached Schedule of Findings

### **Qualitative Aspects of Accounting Practices**

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the School are described in Note 1 to the financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2013. We noted no transactions entered into by the Organization during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected.

The financial statement disclosures are neutral, consistent, and clear.

### **Difficulties Encountered in Performing the Audit**

We encountered no significant difficulties in dealing with management in performing and completing our audit.

### **Corrected and Uncorrected Misstatements**

Professional standards require us to accumulate all misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. Management has corrected all such misstatements. In addition, none of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole.

Larson & Company  
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Main: (801) 798-3545 | Fax: (801) 798-3678  
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Member of  
**CPA AMERICA**  
INTERNATIONAL  
Crowe Horwath International

### ***Disagreements with Management***

For purposes of this letter, a disagreement with management is a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

### ***Management Representations***

We have requested certain representations from management that are included in the management representation letter dated November 8, 2013.

### ***Management Consultations with Other Independent Accountants***

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the Organization's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

### ***Other Audit Findings or Issues***

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Organization's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

### ***Other Matters***

This information is intended solely for the use of the Board of Directors and management of American Leadership Academy and is not intended to be, and should not be, used by anyone other than these specified parties.

Very truly yours,



*Larson & Company, PC*

Larson & Company, PC  
Spanish Fork, Utah

November 8, 2013  
**SCHEDULE OF  
FINDINGS – CURRENT  
YEAR**

**State Compliance**

**SC-2013.1 – Government Records Access Management Act**

**Finding:**

As a part of the new compliance requirements of the State of Utah, the Auditor is required to test additional requirements related to the Government Records Management Act. According to *Utah Code 63-2-103(25)*, the School should appoint a records officer and according to *Utah Code 63G-2-108*, the records officer must complete annual training done by the state archives office. It was noted during our test of compliance that the school has yet to designate a records officer and have not completed the annual training required for compliance.

**Recommendation:**

It is recommended that the School appoint an individual as the “records officer” and have that individual complete the required annual training provided by the state archives office.

**Client Response:**

Management was not aware of this requirement, but will see that the recommendation is followed by appointing an individual as the records officer and see that they have the required training to be in compliance with State requirements.

**Internal Control**

**IC-2013.1 – Disbursement Testing**

**Finding:**

Of 60 disbursements tested, 2 lacked proper documentation in the form of an invoice or other appropriate documentation or the disbursement did not match the documentation.

**Recommendation:**

We recommended that all disbursements are properly documented and authorized as evidenced by an invoice or other documentation.

**Client Response:**

Management will make the changes necessary to see that all disbursements are properly documented and authorized.

**STATUS OF FINDINGS – PRIOR YEAR**

No audit findings noted in prior year.





**AMERICAN LEADERSHIP ACADEMY,  
INCORPORATED COMMUNICATION TO  
THOSE  
CHARGED WITH GOVERNANCE  
YEAR ENDED JUNE 30, 2012**



To the Board of Directors  
American Leadership Academy, Incorporated

We have audited the financial statements of American Leadership Academy, Incorporated for the year ended June 30, 2012, and have issued our report thereon dated November 29, 2012. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated July 5, 2012. Professional standards also require that we communicate to you the following information related to our audit.

### Significant Audit Findings

See attached Schedule

#### *Qualitative Aspects of Accounting Practices*

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the School are described in Note 1 to the financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2012. We noted no transactions entered into by the School during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected.

#### *Difficulties Encountered in Performing the Audit*

We encountered no significant difficulties in dealing with management in performing and completing our audit.

#### *Corrected and Uncorrected Misstatements*

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management. Management has corrected all such misstatement. In addition, none of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole.

#### *Disagreements with Management*

For purposes of this letter, professional standards define a disagreement with management as a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

#### *Management Representations*

We have requested certain representations from management that are included in the management representation letter dated November 29, 2012.

### *Management Consultations with Other Independent Accountants*

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a “second opinion” on certain situations. If a consultation involves application of an accounting principle to the School’s financial statements or a determination of the type of auditor’s opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

### *Other Audit Findings or Issues*

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the School’s auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

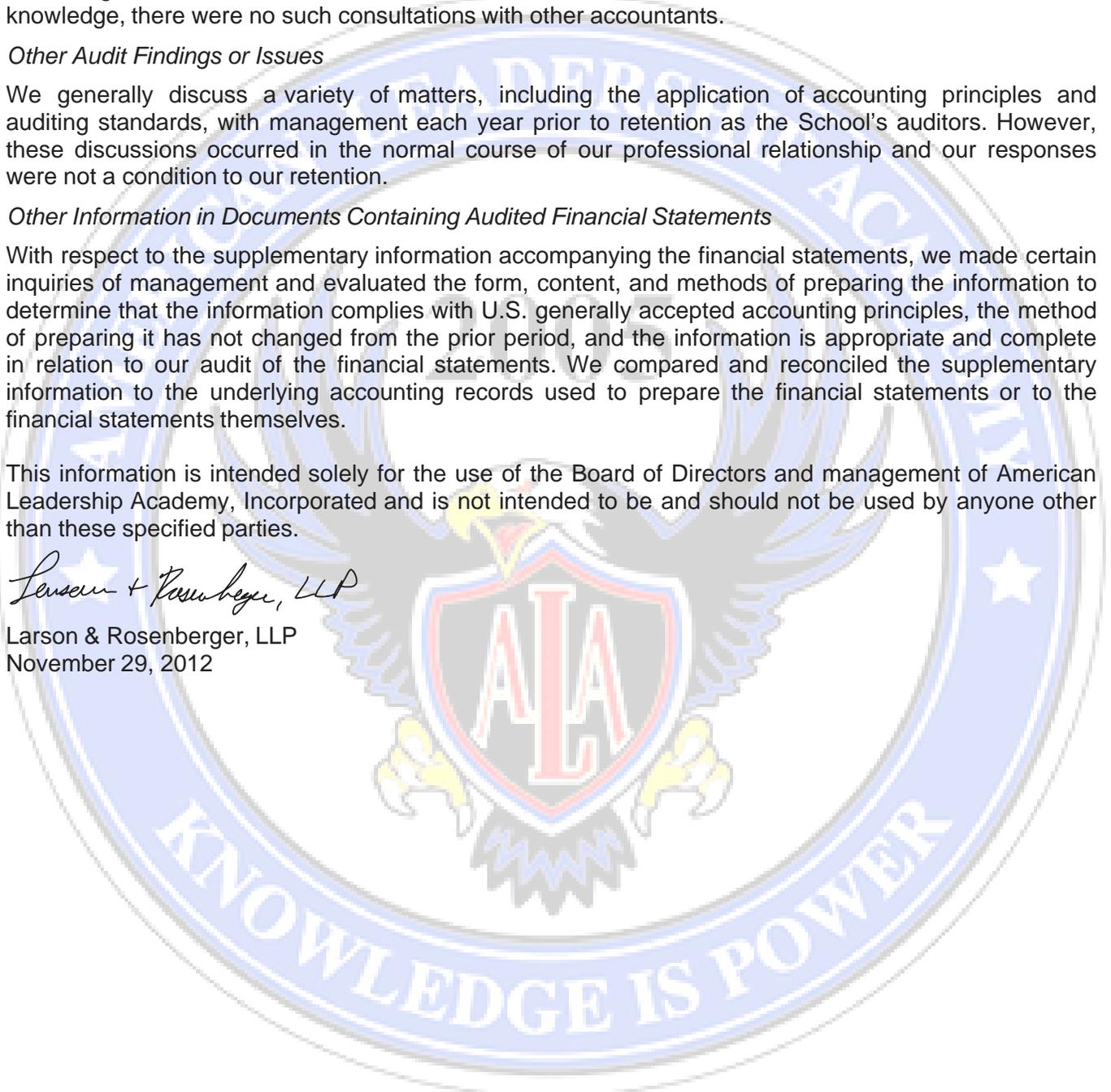
### *Other Information in Documents Containing Audited Financial Statements*

With respect to the supplementary information accompanying the financial statements, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with U.S. generally accepted accounting principles, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

This information is intended solely for the use of the Board of Directors and management of American Leadership Academy, Incorporated and is not intended to be and should not be used by anyone other than these specified parties.

*Larson & Rosenberger, LLP*

Larson & Rosenberger, LLP  
November 29, 2012



SCHEDULE OF FINDINGS – CURRENT YEAR

No audit findings noted in current year.



SCHEDULE OF FINDINGS – PRIOR YEAR

No audit findings noted in prior year.



## Attachment 16

This will be contingent upon the quality of staff/faculty already in place at satellite school. Once approval has been granted this process will begin. There will be observations, communication with the existing Board of Trustees and Director. All decisions will be made to serve the satellite school community and students in the best way possible.

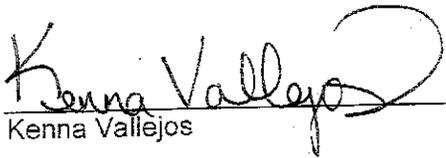
Grade Level	Number of Teachers	Number of Part-time Aides
Kindergarten	3	3
1 <sup>st</sup> Grade	2	2
2 <sup>nd</sup> Grade	2	2
3 <sup>rd</sup> Grade	2	2
4 <sup>th</sup> Grade	2	2
5 <sup>th</sup> Grade	2	2
6 <sup>th</sup> Grade	2	2

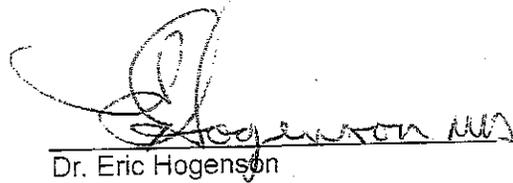
Position	Employees Needed
Administrative Assistants	2
Principal	1
Librarian	1
Lunch Workers	2
Janitorial/Maintenance	1
SPED Director	1 + 4 aides

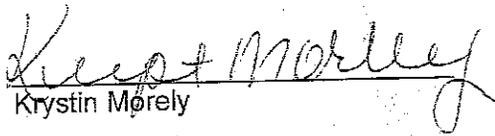
## Attachment 17

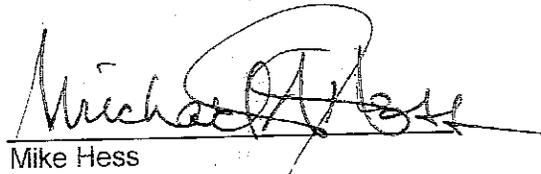
As a member of the American Leadership Academy Board of Trustees, I will cooperate with audits and monitoring associated with determining if the charter school fully satisfies the requirements to apply for a satellite school.

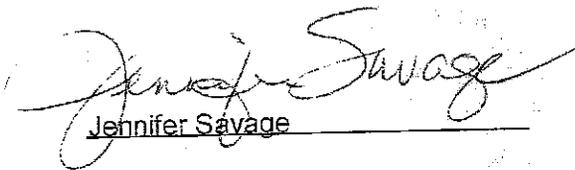
Signed:

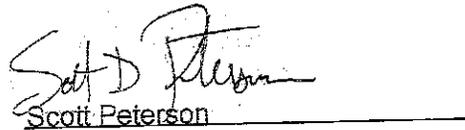
  
Kenna Vallejos

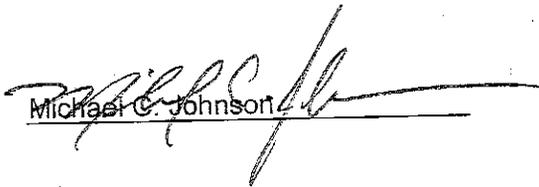
  
Dr. Eric Hogenson

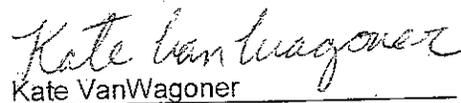
  
Krystin Morely

  
Mike Hess

  
Jennifer Savage

  
Scott Peterson

  
Michael C. Johnson

  
Kate VanWagoner

  
Jan Searle

## Attachment 18

# Jan Searle

1246 Culver Circle  
801-787-6013  
jsearle@americanleadership.net

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### **Education**

Academic Scholarship to Brigham Young University Attended 1973- 1976  
Major: Nursing Minor: Business

### **Work Experience**

American Leadership Academy Spanish Fork, Utah	Business Administrator	2009 - present
Liberty Academy Salem, Utah	Business Administrator	2007-2009
Hagen House Gift & Home Décor Spanish Fork, UT Exclusive Gift Shop \$250K Annually	Owned and Operated Accounting, Purchasing Staff Management	1997-2001
Quik Stop and Lube Springville, UT \$2 Million Annually	Owned and Operated Accounting, Purchasing Staff Management	1993 - 2000
Sprinkler World Christmas Store Springville & Salt Lake City, UT	Business Consultant Purchasing Agent Managed \$500,000 in products	2003 - 2013
BYU Admissions Office	Data Entry	1977- 1978
Eyre Dermatology Clinic	Bookkeeping, Insurance Claims	1975- 1977

### **Service Opportunity**

American Leadership Academy Original Board Member/Founder 2005 - 2010