

# AMENDMENT REQUEST - Draft

## Utah State Board of Education

The Utah State Charter School Board (SCSB) is charged with authorizing, 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.

1. Charter School North Peak Academy
2. Street Address 39 E 1500 S Phone 435-723-8603
3. City Perry County Box Elder
4. This is a school located in an area:      ( X ) Rural              ( ) Urban
5. Chief School Officer Valerie Neslen Phone 435-723-8603
6. The Charter school is located in which school district? Box Elder
7. List or attach all sponsors and/or founders of the charter school;

A list of founding members for North Peak Academy has not yet been finalized. A finalized list will be available fall of 2012 when our doors open for students. Below is a potential founding member list:

<u>LeAnn Brockbank</u>	<u>Meg Ferry</u>	<u>Heidi Nelson</u>
<u>Kassi &amp; Randy Capener</u>	<u>Karen Glauser</u>	<u>Valerie &amp; Cannon Neslen</u>
<u>Shiree Case</u>	<u>Shari Gunther</u>	<u>Jennifer Packer</u>
<u>Rob &amp; Jenn Christensen</u>	<u>Steffanie Jacobson</u>	<u>Suzie Roberts</u>
<u>Bridgett &amp; Paul Clark</u>	<u>Kimberly Jenson</u>	<u>Judy Stratton</u>
<u>Cheryl Comton</u>	<u>Mindy Johnson</u>	<u>Heidi Wheatley</u>
<u>Melissa Connover</u>	<u>Trudee Klein</u>	<u>Susie Witt</u>
<u>Karen Cronin</u>	<u>Meredith Lyons</u>	<u>Lauri Baird</u>
<u>Sharon &amp; Rick Fairbourn</u>	<u>Kari Miller</u>	

8. List or attach all duly elected, current board directors of the school:

<u>Valerie Neslen</u>	<u>Sharon Fairbourn</u>	<u></u>
<u>Rob Christensen</u>	<u>Bridgett Clark</u>	<u></u>
<u>Kassi Capener</u>	<u>Shari Gunther</u>	<u></u>

9. Requested amendment to charter.

We would like to change the name of the school from North Peak Academy to Promontory School of Expeditionary Learning

10. a) Summary description of charter school:

North Peak Academy is an Expeditionary Learning school to be located in Box Elder County. Our curriculum is driven by expeditions. Expeditions are in-depth investigations of important questions and subjects that mirror real challenges. Each school year students will have the opportunity to be engaged in three expeditions that will be closely based on the state standards and teach skills students need to master. These expeditions and the learning they will generate will take students far beyond textbooks.

Also, at North Peak Academy, the words and works of Great Thinkers will permeate every aspect of every expedition. Students will delve into expeditions with original research, discovering the treasures left to us by Great Thinkers of the past, such as Aristotle, Handel, and Abraham Lincoln. We will also study living experts who also hold a wealth of knowledge. Students at North Peak Academy will learn in the presence of local experts as they come into the classroom as guests and students join experts during field work away from the school.

b) How many students will the charter school serve and what grades?

We will serve grades K-9 with a total of 500 students.

c) The charter school's current grade configuration is:

Grades K-9 with a total of 500 students starting in fall 2012

d) Does the charter school's grade configuration align with the local school district configuration?

Yes. In Box Elder School District, elementary schools serve grades k-5, intermediate schools serve grades 6-7, and middle schools serve grades 8-9.

e) Percentage of minority students at charter school:

NA

f) Percentage of special education students at charter school:

NA

g) additional information:

11. What makes this school unique or needed?

There are currently no charter schools within the boundaries of Box Elder County. Bringing North Peak Academy to the community will inevitably bring an increase of choice to students and their parents. Without North Peak Academy, there are very limited choices outside the realm of traditional public school. The innovative learning environment that will permeate North Peak Academy will offer students the option of learning outside the box.

12. Is the schools' curriculum fully aligned with the Utah State Core Curriculum? If not, in what areas does the school deviate from the Core?

Yes, the curriculum will be fully aligned with the Utah State Core Curriculum.

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

The following is taken from North Peak Academy's charter application:

#### Section 14: Special Education

In accordance with Federal and State Law, North Peak Academy will ensure that a free appropriate public education (FAPE) is available to any qualified student with a disability who needs special education and related services.

North Peak Academy will serve students with special needs using an inclusion model to the extent possible, while at the same time ensuring that a continuum of alternative placements is available to meet the needs of the students with disabilities as determined by the IEP team. The instructional staff will include at least one full-time special educator with special education certification. In addition, consultative and other contractual services will be arranged as necessary to meet the requirements of students' Individual Educational Plans (IEP). The Director and Special Education staff will ensure the school is compliant with all requirements of IDEA as revised in 2004. Additionally, they will work with the USOE Special Education Department for help in the implementation of alternative testing procedures for special education students.

#### Delivery of Services

Several elements of North Peak Academy's instructional approach are designed to enable the school to more effectively respond to diverse demands and help accelerate the learning of students with disabilities. These include:

- A. The school will use Least Restrictive Environment(LRE), placing students with special needs along with their non-disabled peers to the maximum extent appropriate, while at the same time ensuring that a continuum of alternative placements is available to meet the needs of the students with disabilities as determined by the IEP team. This heterogeneous grouping of students provides greater opportunities for students to learn from and support each other. The school's project-based approach is optimal for differentiating learning activities to address the needs of individual students. However, students qualifying for special education services may be pulled out for one-on-one or small group instruction with a special educator or related service provider. Removal from the regular education environment will occur if the nature or severity of the disability precludes satisfactory achievement, even with the use of supplementary aids and services in the regular classroom. These kinds of important decisions will be directed by the requirements in a student's IEP.
- B. Team-based approach. A key factor in learning is motivation. The team approach is designed to help motivate students to more fully engage themselves in the learning process. The team approach also provides a good mechanism for facilitating peer-tutoring and other assistance to students with special needs. North Peak Academy

will use its school wide structure of “crew” to provide this team-based culture for all students, including those with disabilities.

- C. Cooperative learning. A significant body of research has shown that cooperative learning instructional strategies produce greater academic learning, enhanced self-esteem, and improves relationships between mainstreamed academically handicapped students and normal-progress students. The approach enables all students to experience success and places students in a position in which they more naturally learn from their peers.
- D. Hands-on, experiential learning. These types of activities enhance learning for all students, but they are often particularly helpful for students that struggle with more traditional instructional approaches. Students have greater opportunity to employ their “multiple intelligences” to gain understanding of key concepts. In addition to the work of Howard Gardner, these activities are supported by research in the Cognitive Sciences. Active Pedagogy will be a key element in teaching practices throughout the school.
- E. High expectations. All students will be expected to set and achieve challenging academic goals designed to accelerate their learning. Progress will be charted in their student portfolios. Each student, regardless of disability, will learn to take personal responsibility for their own learning.

North Peak Academy will ensure each student is treated as an individual, with special gifts and needs. Appropriate accommodations will be made for students with disabilities in order to ensure access to all activities.

### Continuum of Services

North Peak Academy will implement all existing IEP’s.

The school will provide eligible students with disabilities a free appropriate public education (FAPE) in the least restrictive environment (LRE). To assist each student to achieve commensurate with his or her abilities, special education will be offered, including modification of instructional level, content or performance criteria; adaptations to the environment, curriculum, instruction or assessment; and accommodations to allow students to access and demonstrate learning. North Peak Academy will provide a continuum of special education services, and will service all students with disabilities, regardless of severity.

Outsourcing will be utilized if necessary to service IEP’s; funds have been budgeted for this purpose. However, it is anticipated that most of the special needs will be appropriately addressed by the school’s full-time special education staff.

### Identification – (Child Find & Referrals)

All members of the instructional staff will be trained annually by the special education staff in confidentiality and “child find” procedures. North Peak Academy will ensure identification of special education students includes the notification of, and ongoing

communication with parents. The special education staff will oversee all aspects of child find, including: Awareness, Outreach, Screening, Evaluation and Collaboration.

Teachers may refer students to the special education teacher for testing, or parents can also seek testing for their child if they suspect a problem. After a child has been identified as needing assessment, the special education teacher will do a preliminary evaluation to determine if other specialists are needed. This shall be done in a timely manner consistent with State and Federal guidelines. Then, with parental permission, assessments will be made, and an Individualized Education Program can be implemented, if necessary. IEP's will be under the direction of the special education staff, along with an IEP team. This team will include the parents, the teacher, the Director and any specialists as needed. The student may also be involved, if appropriate.

Once identified, the IEP Team will determine levels of need and special education of the child, and will refer the child for needed available special services. Referring teachers will submit appropriate screening forms and document all previous classroom interventions that are pertinent to the child's placement.

If a child is found eligible for special education services, an IEP will be developed. The IEP team will convene within 30 calendar days of eligibility to develop an IEP. No special education services will be provided prior to the development of the IEP.

### Staffing

The Director of North Peak Academy will have in-depth working knowledge of IDEA 2004. North Peak will plan for at least 2 full time Special Education staff to handle at least 12% of enrolled students at the school. Both will be required to know and understand the elements of IDEA 2004. The special education staff will be required to take annual trainings on Child Find and IEP delivery as provided by the Utah State Office of Education. They will be responsible for assessments of students with special needs, and will also be responsible for helping teachers identify other students who may have special needs. They will host an annual Child Find training for all North Peak Academy staff. They will also facilitate the contracting of any additional professional help needed to carry out all IEP requirements. The Director at North Peak Academy will review the staffing needs periodically

### Accessibility

Because North Peak Academy is a nonprofit service provider (Charter School) we will use ADA Requirements when building or renovating a structure for our school. Accommodations will comply with regulations regarding exclusion, segregation, and unequal treatment. North Peak Academy will meet architectural standards for new and altered buildings as per ADA Accessibility Guidelines for Buildings and Facilities (ADAAG). Some regulations that will be used when determining compliance include: 4.1.2 Accessible Sites and Exterior Facilities: New Construction , 4.1.3 Accessible Buildings: New Construction , 4.1.5 Accessible Buildings , 4.1.6 Accessible Buildings: Alterations , and A15.6 Play Areas. North Peak Academy will consider appropriate reach ranges for children seated in wheelchairs when procuring tables and desks and all aspects of school design including water fountains, bathrooms, accessibility, and in designing the parking lot.

## Annual Review/Records

Each IEP will be reviewed not less than once a year. Any team member may request additional IEP meetings. Prior to each IEP meeting, a written Meeting Notice will be provided to each member, including the parent, with adequate time to ensure participation. During the IEP review, progress toward annual goals will be addressed, along with the results of any reevaluation conducted, and any information from the team members regarding the needs of the child. Documentation of the annual goals review will be recorded on the original copy of the IEP being reviewed. A revised IEP will be completed not less than once a year or as required by the IEP itself.

North Peak Academy will aggressively work to transfer all existing IEP's from previous schools. The special education staff will request, review, maintain, and transfer student records as required by the USOE and IDEA 2004.

## English Language Learners (ELL, formerly ESL)

Students with Limited English Proficiency (LEP) will be served at North Peak Academy on an inclusion based setting. Our school will welcome students with diverse cultural and linguistic backgrounds. We will comply with the standards set by the Office of Civil Rights (OCR) for the education of students who speak a second language. We will provide for Identification, Testing, Placement and Instructional design for ESL students. On the registration form we will ask the question "Is a second language spoken in the home?" If the answer is yes, the student will be tested by a certified teacher with an ESL endorsement using a standard testing instrument, such as the Ideal Proficiency Test (IPT). Based on their test results, the students will be served by an endorsed ESL teacher, who will work closely with the other teachers.

Working together, we will ensure that the distinct educational needs of these students will be met as they are included in the Crews and participate in the expeditions. Some of the techniques used may include the SIOP Model (*Making Content Comprehensible for English Learners*) Sheltered Instruction Observational Protocol, direct teaching of target vocabulary, and Total Physical Response (TPR).

North Peak Academy will encourage participation by the parents and families of ESL students, recognizing that their rich and diverse cultural backgrounds may provide many resources to our school.

14. Provide a copy of current school year budget and projected budget with amendments.

The following budget information is taken from the North Peak Academy charter application, Sections 7 and 8:

## Planning Year Budget

Charter School Name: North Peak Academy			
		Planning Year	
Number of Students:	500		
Grade Conifuration	K-9		
<b>Revenue</b>	<b>Total</b>		
Local Funding including anticipated fees from students			
Fee Basis if applicable:			
State Funding			
Private Grants & Donations			
Source(s): Fundraising			
Loans:			
Commercial			
Private:			
Other (specify): CHARTER SCHOOL REVOLVING LOAN		\$182,000	
<b>Total Revenue</b>		<b>\$182,000</b>	
<b>Expenses</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Total</b>
Salaries (100)			
Director or Principal	-	\$ -	\$
Other Administration: (specify)	-	\$ -	\$
Teacher-Regular Ed	-	\$ -	\$
Teacher-Special Ed	-	\$ -	\$
Instructional Assts	-	\$ -	\$
Secretary	-	\$ -	\$
Business Manager/Bookkeeper	-	\$ -	\$
IT Technician	-	\$ -	\$
Program Facilitator/Instructional Support	-	\$ -	\$
Speech & Language Therapist	-	\$ -	\$
Counselor (Certified/Noncertified) (Circle)	-	\$ -	\$
Substitute Teachers (daily basis)	-	\$ -	\$
Teachers Aids and ParaProfessionals	-	\$ -	\$
Employee Benefits (200)			
Purchased Professional Services(300)			-
Audiologist, Psychologist, related support services (contracted)			-
Professional Employee Training and Development (330)			5,000
Adminsitrative Services in Support of Management (310)			30,000
Professional Educational Services (contracted) (320)			30,000
Legal (300)			1,000
Audit Services (300)			
Web Site Development (300)			
Purchased Property Services(400)			
Facilities Rental or Lease (440)			
Property Tax			
Equipment or Vehical Rental or Lease/Purchase Agreements			
Other Purchased Services (500)			
Travel (580)			9,000
Transportation (Student) ((510-513)			
Personnel and Wage Records and Data Management			

Supplies(600)						
Instructional and other general supplies (610)			16,000			
Library Instructional Aids/Books/Periodicals(640/645)			12,000			
Textbooks (641)						
Audiovisual Materials (646)						
Software (670)			5,000			
Other (printing; postage)						
<b>Total Instruction, Administration &amp; Support</b>			<b>\$108,000</b>			
<b>Operations &amp; Maintenance</b>			<b>Total</b>			
Purchased Property Services(400)						
Facilities Rental or Lease (440)						
Water, Sewage , Disposal Services						
Property Tax						
Equipment or Vehical Rental or Lease/Purchase Agreements						
Custodial Services						
Other Purchased Services (500)						
Property/Casualty Insurance (520/521)						
Advertising and Marketing			3,000			
Printing and Binding						
Phone/Communications						
Supplies (600)						
Operational Supplies						
Utilities and other Expendable Supplies (610-630)						
Property (700)						
Land & Improvements						
Buildings						
Technology-Related Hardware (Computers etc)			20,000			
Furniture & Other Equipment			51,000			
Debt Service and Miscellaneous Costs (800)						
Fees/Permits & dues						
Loan Payments						
Other (security, copier lease)						
<b>Total Operations &amp; Maintenance</b>			<b>\$ 74,000.00</b>			
<b>Total Expenditures</b>			<b>\$182,000.00</b>			
<b>Total Revenues</b>			<b>\$182,000</b>			
			<b>Balance</b>			
<b>Budget Balance (Revenues-Expenditures)</b>			<b>\$0</b>			
<b>Budget Balance as Percentage of State Revenue</b>						

Year 1

	Enrollment Maximum or Target	75% Enrollment or Target
	First Operational Year	First Operational Year
Number of Students:	450	338
Grade Configuration:	K-9	K-9
<b>Revenue</b>	<b>Total</b>	<b>Total</b>
Local Funding including anticipated fees from students		
Fee Basis if applicable:		
State Funding	\$2,312,698	\$1,695,615
Private Grants & Donations		
Source(s): Fundraising	\$5,000	\$15,000
Loans:		
Commercial		
Private		
Other (specify):		
NCLB Title Funding	\$40,000	\$30,000
<b>Total Revenue</b>	<b>\$2,357,698</b>	<b>\$1,740,615</b>

Expenses	# of Staff	@ Salary	Total	# of Staff	@ Salary	Total
Salaries (100)						
Director or Principal	1.00	\$ 70,000	\$70,000	1.00	\$ 60,000	\$60,000
Other Administration: (specify)		\$ -	\$ -		\$ -	\$ -
Teacher-Regular Ed	17.00	\$ 36,000	\$612,000	13.00	\$ 33,000	\$429,000
Teacher-Special Ed	2.00	\$ 40,000	\$80,000	1.50	\$ 35,000	\$52,500
Instructional Assts	-	\$ 35,000	\$ -		\$ 32,000	\$ -
Secretary	1.50	\$ 25,000	\$37,500	1.00	\$ 25,000	\$25,000
Business Manager/Bookkeeper	-	\$ -	\$ -	-	\$ -	\$ -
IT Technician	-	\$ -	\$ -	-	\$ -	\$ -
Program Facilitator/Instructional Support	2.50	\$ 32,000	\$80,000	2.00	\$ 30,000	\$60,000
Speech & Language Therapist	-	\$ -	\$ -	-	\$ -	\$ -
Counselor (Certified/Noncertified) (Circle)	-	\$ -	\$ -	-	\$ -	\$ -
Substitute Teachers (daily basis)			\$15,000			\$10,000
Teachers Aids and ParaProfessionals			\$20,000			\$10,000
Employee Benefits (200)			\$284,720			\$205,575
Purchased Professional Services(300)			-			-
Audiologist, Psychologist, related support services (contracted)			18,000			13,000
Professional Employee Training and Development (330)			60,000			40,000
Administrative Services in Support of Management (310)			60,000			48,000
Professional Educational Services (contracted) (320)			-			-
Legal (300)			5,000			3,000
Audit Services (300)			2,000			2,000
Web Site Development (300) (including IT Services)			25,000			15,000
Purchased Property Services(400)			-			-
Facilities Rental or Lease (440)			-			-
Property Tax			-			-
Equipment or Vehical Rental or Lease/Purchase Agreements			-			-
Other Purchased Services (500)						
Travel (580)			10,000			5,000
Transportation (Student) ((510-513)			-			-
Personnel and Wage Records and Data Management			-			-
Supplies(600)						
Instructional and other general supplies (610)			50,000			37,500
Library Instructional Aids/Books/Periodicals(640/645)			12,000			8,000
Textbooks (641)			20,000			15,000
Audiovisual Materials (646)						-
Software (670)			10,000			4,000
Other (printing; postage)			5,000			3,000
<b>Total Instruction, Administration &amp; Support</b>			\$1,476,220			\$1,045,575

<b>Operations &amp; Maintenance</b>			<b>Total</b>			<b>Total</b>
Purchased Property Services(400)						
Facilities Rental or Lease (440)			520,000			437,500
Water, Sewage , Disposal Services						
Property Tax			35,000			30,000
Equipment or Vehical Rental or Lease/Purchase Agreements			-			-
Custodial Services			40,000			35,000
Other Purchased Services (500)						
Property/Casualty Insurance (520/521)			13,600			11,584
Advertising and Marketing			3,000			2,000
Printing and Binding			3,000			1,000
Phone/Communications			9,000			9,000
Supplies (600)						
Operational Supplies			10,000			8,000
Utilities and other Expendable Supplies (610-630)			35,000			30,000
Property (700)						
Land & Improvements			5,000			1,000
Buildings			5,000			1,000
Technology-Related Hardware (Computers etc)			25,000			15,000
Furniture & Other Equipment			15,000			5,000
Debt Service and Miscellaneous Costs (800)						
Fees/Permits & dues			500			500
Loan Payments			18,930			18,930
Other (security, copier lease)			9,000			5,000
<b>Total Operations &amp; Maintenance</b>			<b>\$ 747,030.00</b>			<b>\$ 610,514.00</b>
<b>Total Expenditures</b>			<b>\$ 2,223,250.00</b>			<b>\$ 1,656,089.00</b>
<b>Total Revenues</b>			<b>\$2,357,698</b>			<b>\$1,740,615</b>
			<b>Balance</b>			<b>Balance</b>
<b>Budget Balance (Revenues-Expenditures)</b>			<b>\$134,448</b>			<b>\$84,526</b>
<b>Budget Balance as Percentage of State Revenue</b>			<b>5.8%</b>			<b>5.0%</b>

Year 2

Charter School Name: North Peak Academy		
	Enrollment Maximum or Target	75% Enrollment or Target
	Second Operational Year	Second Operational Year
Number of Students:	500	375
Grade Configuration:	K-9	K-9
<b>Revenue</b>	<b>Total</b>	<b>Total</b>
Local Funding including anticipated fees from students		
Fee Basis if applicable:		
State Funding	\$2,597,465	\$1,905,123
Private Grants & Donations		
Source(s): Fundraising	\$5,000	\$10,000
Loans:		
Commercial		
Private		
Other (specify):		
NCLB Title Funding	\$45,000	\$40,000
<b>Total Revenue</b>	<b>\$2,647,465</b>	<b>\$1,955,123</b>

Expenses	# of Staff	@ Salary	Total	# of Staff	@ Salary	Total
Salaries (100)						
Director or Principal	1.00	\$ 75,000	\$75,000	1.00	\$ 60,000	\$60,000
Other Administration: (specify)		\$ -	\$ -		\$ -	\$ -
Teacher-Regular Ed	19.00	\$ 37,000	\$703,000	14.00	\$ 34,000	\$476,000
Teacher-Special Ed	2.50	\$ 41,000	\$102,500	1.50	\$ 40,000	\$60,000
Instructional Assts	1.00	\$ 40,000	\$40,000		\$ 35,000	\$ -
Secretary	1.50	\$ 26,000	\$39,000	1.00	\$ 26,000	\$26,000
Business Manager/Bookkeeper	-	\$ -	\$ -		\$ -	\$ -
IT Technician	-	\$ -	\$ -		\$ -	\$ -
Program Facilitator/Instructional Support	2.50	\$ 33,000	\$82,500	2.50	\$ 31,000	\$77,500
Speech & Language Therapist	-	\$ -	\$ -		\$ -	\$ -
Counselor (Certified/Noncertified) (Circle)	-	\$ -	\$ -		\$ -	\$ -
Substitute Teachers (daily basis)			\$18,000			\$12,000
Teachers Aids and ParaProfessionals			\$23,000			\$10,000
Employee Benefits (200)			331,720			\$232,320
Purchased Professional Services(300)			-			-
Audiologist, Psychologist, related support services (contracted)			23,000			15,000
Professional Employee Training and Development (330)			60,000			45,000
Administrative Services in Support of Management (310)			60,000			60,000
Professional Educational Services (contracted) (320)			-			-
Legal (300)			10,000			5,000
Audit Services (300)			10,000			10,000
Web Site Development (300)			18,000			10,000
Purchased Property Services(400)			-			-
Facilities Rental or Lease (440)			-			-
Property Tax			-			-
Equipment or Vehical Rental or Lease/Purchase Agreements			-			-
Other Purchased Services (500)						
Travel (580)			12,000			8,000
Transportation (Student) ((510-513)			-			-
Personnel and Wage Records and Data Management			-			-
Supplies(600)						
Instructional and other general supplies (610)			60,000			50,000
Library Instructional Aids/Books/Periodicals(640/645)			12,000			12,000
Textbooks (641)			15,000			15,000
Audiovisual Materials (646)			-			-
Software (670)			5,000			3,000
Other (printing; postage)			10,000			8,000
<b>Total Instruction, Administration &amp; Support</b>			<b>\$1,709,720</b>			<b>\$1,194,820</b>

<b>Operations &amp; Maintenance</b>			<b>Total</b>			<b>Total</b>
Purchased Property Services(400)						
Facilities Rental or Lease (440)			540,000			455,000
Water, Sewage , Disposal Services						
Property Tax			40,000			30,000
Equipment or Vehical Rental or Lease/Purchase Agreements			-			-
Custodial Services			45,000			35,000
Other Purchased Services (500)						
Property/Casualty Insurance (520/521)			14,500			12,250
Advertising and Marketing			4,000			2,000
Printing and Binding			3,000			1,000
Phone/Communications			9,000			9,000
Supplies (600)						
Operational Supplies			10,000			8,000
Utilities and other Expendable Supplies (610-630)			35,000			30,000
Property (700)						
Land & Improvements			5,000			1,000
Buildings			5,000			1,000
Technology-Related Hardware (Computers etc)			15,000			15,000
Furniture & Other Equipment			10,000			5,000
Debt Service and Miscellaneous Costs (800)						
Fees/Permits & dues			3,000			3,000
Loan Payments			37,860			37,860
Other (security, copier lease)			9,000			9,000
<b>Total Operations &amp; Maintenance</b>			<b>\$ 785,360.00</b>			<b>\$ 654,110.00</b>
<b>Total Expenditures</b>			<b>\$ 2,495,080.00</b>			<b>\$ 1,848,930.00</b>
<b>Total Revenues</b>			<b>\$2,647,465</b>			<b>\$1,955,123</b>
			<b>Balance</b>			<b>Balance</b>
<b>Budget Balance (Revenues-Expenditures)</b>			<b>\$152,385</b>			<b>\$106,193</b>
<b>Budget Balance as Percentage of State Revenue</b>			<b>5.9%</b>			<b>5.6%</b>

15. Provide a copy of most recent UPASS state academic information. You may attach additional academic information if desired.

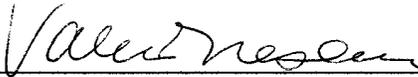
NA

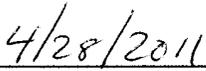
16. Who performs the financial accounting for the school (by name) and what are his/her credentials for accounting?

Kassi Capener, CPA (see attached resume)

17. Provide the name and title of district personnel to whom you provided a copy of your entire amendment request, as well as the date of contact.

Superintendent Ron Wolff, April 28, 2011

  
\_\_\_\_\_  
Charter School Board Representative Signature

  
\_\_\_\_\_  
Date

\_\_\_\_\_  
NA  
Charter School Principal/Director

\_\_\_\_\_  
NA  
Date

## *Kassi Capener*

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### Employment History:

My professional background has prepared me well to make significant contribution in the management of the school's financial resources. I am a Certified Public Accountant since 2000 with work experience in the fields of auditing and business consulting.

Senior Business Consultant, Arthur Andersen, LLP, Portland, OR  
*August 1998 to June 2002*

As a business consultant, I acquired skills related to financial accounting process redesign, reengineering, and system implementation. I managed functional and technical teams for multiple system module implementations and was given the opportunity to write business plans, implement strategies for change, and develop professional development policy.

Auditor, Arthur Andersen, LLP, Salt Lake City, UT  
*September 1997 to August 1998*

As an auditor, I performed audits of financial statements for clients in various industries. I have gained exposure to numerous financial statement issues and performed compliance testing, test of controls, and procedural documentation for payroll and expenditure and revenue cycles. I developed effective working relationships with client management and assisted in coordinating engagement team effort.

Seminar Coordinator, Partners in Business, Utah State University, Logan, UT  
*June 1994 to August 1997*

As a seminar coordinator, I directed the general development, promotion, and speaker involvement for management education seminars. My responsibilities included soliciting program participation from businesses throughout the Intermountain West and interacting on a daily basis with top management of participating clients.

### Education History:

My educational background focused on the financial aspects of business and complements my position as Treasurer on the Board of Trustees. I have had extensive training and experience in accounting, specifically audit and business information systems.

- Certified Public Accountant

Oregon, May, 2000

- Masters of Accountancy, with emphasis in Accounting Systems  
Utah State University, Logan, UT, August, 1997
- Bachelors of Science in Accounting  
Utah State University, Logan, UT, August 1996