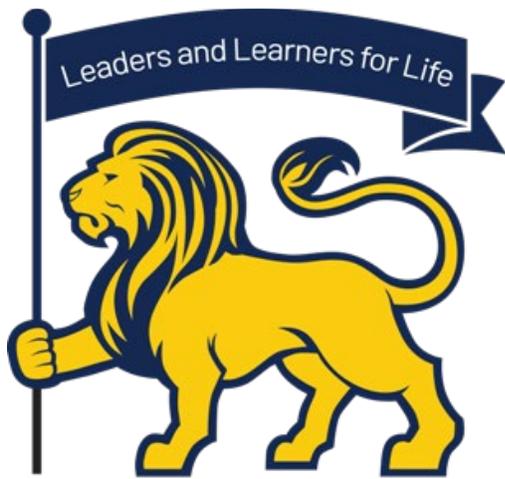


# Final Report: Excelsior Academy

January 2022

## TABLE OF CONTENTS

Overall Summary .....	2
Report from SCSB Staff .....	3
School Performance within a 5 Mile Radius.....	4
Minimum Eligibility for Approval Analysis.....	5
Map of Proposed Location Area Schools.....	7
For Reference: Minimum Eligibility to Apply Analysis.....	8



# EXCELSIOR ACADEMY

A tuition-free public charter school

## OVERALL SUMMARY

Excelsior Academy is a successful charter school that opened in 2009 in Erda. The school serves students in K-8<sup>th</sup> grade and has a maximum enrollment of 1410. The school currently is at 96% of its enrollment max. The school sent a survey in 2021 to the community in which 548 of 617 participants indicated they would like to send their student to Excelsior Academy for 9<sup>th</sup> grade.

The application meets all minimum standards to be considered, as outlined in R277-552-7. The application has also been compared to the standards that must be met for approval and has included notes on page 6.

The application provides much detail to show that Excelsior Academy is a successful school. However, more specific information about how this model will translate into high school is still needed. There is also some confusion as to what EA is asking for. In the school entity information section, it states:

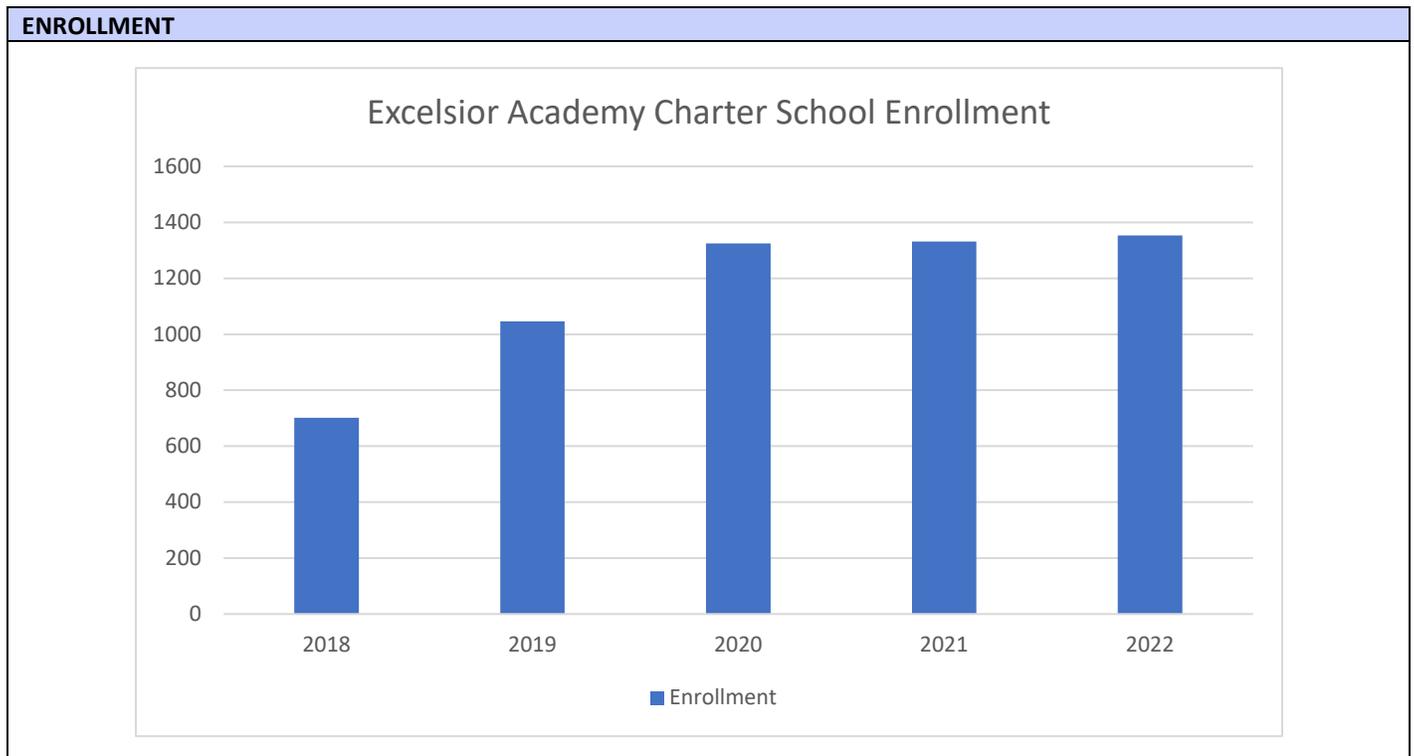
Name of Satellite School: Excelsior Academy Early Elementary, Excelsior Academy High School. We would also like our current middle school to become a satellite school from the current elementary.

Thus, it appears that EA is seeking to have three schools (two satellite schools) through this application.

# SCSB STAFF REPORT

EXPANSION APPLICATION				
Excelsior Academy				
PROPOSED LOCATION		PROPOSED GRADES SERVED		PROPOSED ENROLLMENT
Erda, Tooele School District Area		K-12		<b>2,825</b>
MISSION & FOCUS				
EAC is founded on two integral foundations: Academic Achievement and Character Development. Our philosophical approach serves as the foundation of these two pillars. We believe that students are entitled to an education of superior quality that guides them to become successful, contributing members of society as adults.				
MARKET DETAILS				
Market Area:	% ED	% ELL	% M	% SWD
Tooele District	27.3%	3.4%	17.4%	9.9%
State of Utah	30%	8%	27%	13%
EA (current)	21.2%	0.4%	17.9%	15.3%
EA (proposed)	We expect the demographics of the early elementary and high school to remain the same as the current student population.			

**Key: ED: Economically Disadvantaged, ELL: English Language Learner, M: Minority, SWD: Students with Disabilities**



# ANALYSIS OF REQUIREMENTS:

## GOVERNING BOARD:

- Board has 7 members. Overall, the board appears to be functioning well.
- No noted governance concerns through the oversight process.

## FINANCIAL VIABILITY

- School appears to be financially viable.
- No noted financial concerns through the oversight process.

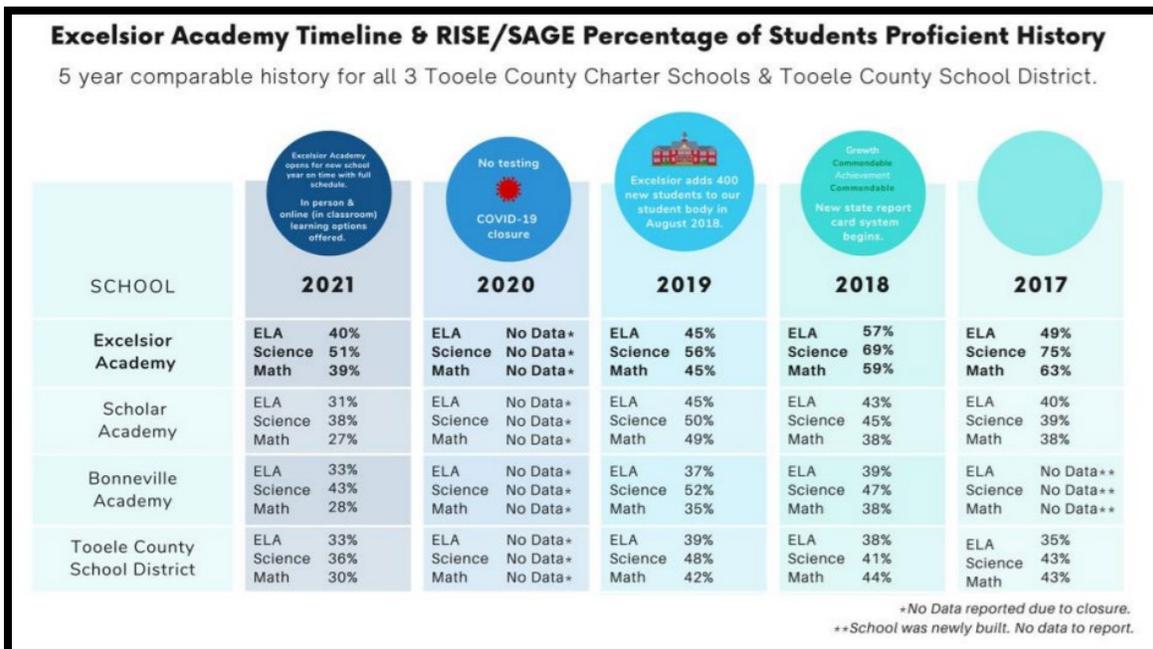
## ACADEMIC PROGRAM AND STANDARDS

- School appears to have a successful academics program.
- No noted academic concerns through the oversight process.

## AREA PERFORMANCE ON STATE ACCOUNTABILITY

Proficiency Rate		SubjectArea	SchoolYear	Language Arts		Mathematics		Science	
Miles	SchoolName	2019	2021	2019	2021	2019	2021	2019	2021
0	Excelsior Academy	45.0%	40.4%	45.1%	39.4%	54.8%	51.2%		
1.67	Rose Springs School	57.8%	40.9%	47.8%	44.9%	66.1%	52.8%		
2.32	Clarke N. Johnsen Jr High	47.3%	41.2%	49.2%	39.9%	53.5%	54.6%		
2.5	Overlake School	44.6%	31.0%	44.0%	37.9%	59.8%	34.4%		
2.95	Copper Canyon School	31.6%	22.4%	28.7%	22.4%	39.2%	29.9%		
2.98	Stansbury Park School	51.5%	43.8%	59.2%	45.4%	64.9%	60.7%		
3.38	Old Mill School	50.5%	38.6%	50.8%	40.6%	56.9%	41.7%		
3.59	Middle Canyon School	43.4%	36.3%	44.6%	36.1%	57.3%	39.7%		
3.7	Scholar Academy	44.5%	31.4%	48.5%	27.0%	49.5%	39.0%		
4.58	Sterling School	33.6%	25.6%	26.6%	23.3%	35.3%	33.8%		
4.67	Northlake School	36.5%	27.3%	38.9%	33.9%	48.4%	40.8%		
5	Tooele Jr High	30.5%	29.0%	44.7%	34.4%	42.5%	39.3%		
2.82	Bonneville Academy	36.0%	32.4%	34.3%	27.5%	51.7%	43.5%		
<b>Grand Total</b>		<b>42.0%</b>	<b>34.8%</b>	<b>43.8%</b>	<b>35.4%</b>	<b>51.4%</b>	<b>44.7%</b>		

EA chosen comparisons:



# MINIMUM REQUIREMENTS FOR APPROVAL

## Applicant: Excelsior Academy Charter School

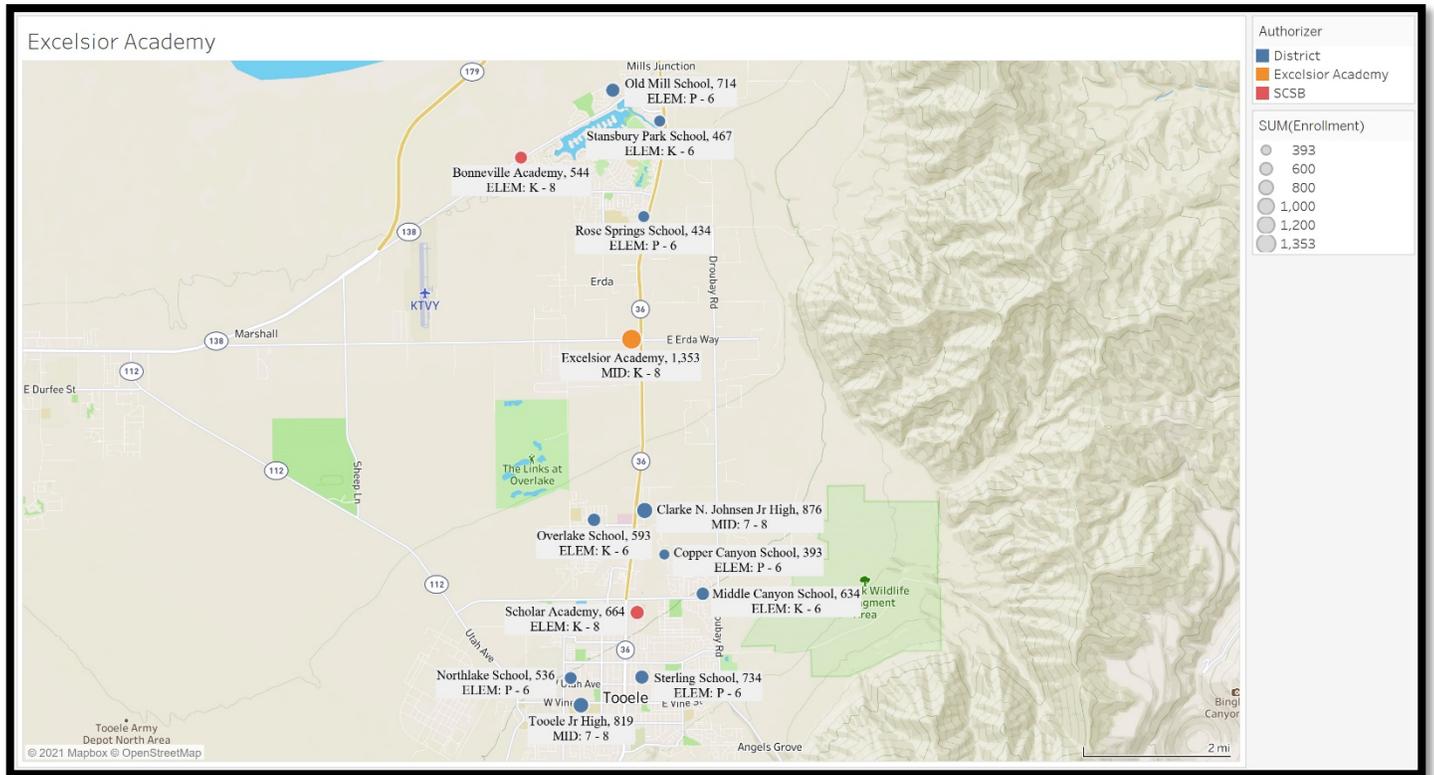
Date: January 2022

An authorizer may only **approve** an application from a charter school for a satellite school if:

<b>Requirements:</b> <i>From R277-552-7 (5)</i>	<b>Notes:</b>	
(a) the charter school is meeting the terms of its charter agreement;	The application lists the key elements of the charter agreement. While EA appears to meet most of the elements, class size is not addressed (rather a ratio of adults to students is provided), the aides per classroom do not align with the goal in middle school, the Parent Teacher Conference rate is lower than the target, and the Directed Learning/Club Time is different in practice than as written in the charter agreement.	
<b>(b) the charter school has maintained for each of the last three years (only need to meet one of the following):</b>		
	(i) a re-enrollment rate of at least 80%;	2021: 89.7% 2020: 85% 2019: 91.5%
	(ii) a wait list of at least 40% of its annual enrollment; or	Waitlist appears to be greater than 40% of the annual enrollment.
	(iii) there is a demonstrated demand for the proposed satellite, taking into consideration the market analysis required under Subsection (2)(f);	The applicant describes the following needs in the community: high school, classical foundation, leveled learning, middle school electives, competitive sports program, and all-day kindergarten. The applicant believes this expansion will allow them to meet all of these community needs.
<b>(c) the charter school is academically and operationally successful, taking into consideration at least two years of academic performance data of students at the charter school, including whether the charter school is performing at or above (must meet both of the following):</b>		
	(i) the academic goals established in the charter school's agreement; and	The application refers to its key elements, rather than school goals. In a charter review from 6/20, EA states that they do not have charter school goals. The current EA charter agreement is quite outdated. The academic goals refer to either internal metrics (such as percent of students on the "Director's List", or outdated assessments such as ITBS or CRT.
	(ii) the average academic performance of other district and charter schools in the area or schools targeting similar populations or demographics;	When comparing to the schools within a 5-mile radius, EA meets this target for all subject areas when schools are averaged. In the school's own data, EA did not meet this target for 2019 in Math.

<b>(d) the charter school has plans for the new school to (must meet all the following):</b>																																											
	(i) provide educational services consistent with state law and Board rule;																																										
	(ii) administer and have capacity to carry out statewide assessments including proctoring statewide assessments, consistent with Section 53E-4-303 and Rule R277-404; and																																										
	(iii) provide evidence-based instruction for special populations as required by federal law;																																										
Excelsior Academy certifies the school is academically successful, provides educational services consistent with state law and USBE rule, administers statewide assessment consistent with state law and USBE rule, and provides evidence-based instruction for special populations as required by federal law																																											
EA provides detailed information for what SpEd will look like at the High School and Early Elementary level.																																											
<b>(e) the charter school has adequate qualified administrators and staff to meet the needs of the proposed student population at the new school;</b>	The executive director oversees (and will continue to oversee) all four schools. The executive director has purview over all school directors and assistant directors. Each school director will manage and oversee the direct operations of each school while receiving guidance from the executive director.																																										
<b>(f) the school is in compliance with all public-school legal obligations;</b>	There are no known compliance issues.																																										
<b>(g) the charter school is in good standing with its authorizer; and</b>	The SCSB has no concerns with EA																																										
<b>(h) the charter school is financially viable, as evidenced by the charter school's financial records, including the charter school's:</b>																																											
	(i) most recent annual financial report (AFR);																																										
	(ii) annual program report (APR); and																																										
	(iii) audited financial statements.																																										
<table border="1"> <thead> <tr> <th>Metric</th> <th>Standard</th> <th>3 Prior FY</th> <th>2 Prior FY</th> <th>Prior FY</th> <th>Current YTD</th> </tr> </thead> <tbody> <tr> <td><i>Fiscal Year or Month Used</i></td> <td></td> <td>2019</td> <td>2020</td> <td>2021</td> <td>2022</td> </tr> <tr> <td>Unrestricted Days Cash</td> <td>≥ 30</td> <td>62.57</td> <td>95.94</td> <td>123.5</td> <td>109.17</td> </tr> <tr> <td>Debt to Asset Ratio</td> <td>≤ 1</td> <td>.99</td> <td>.94</td> <td>.91</td> <td>.17</td> </tr> <tr> <td>Current Ratio</td> <td>≥ 1</td> <td>1.49</td> <td>4.24</td> <td>6.37</td> <td>6.2</td> </tr> <tr> <td>Audit Findings</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>N/A</td> </tr> <tr> <td>Change in Net Assets</td> <td>Positive</td> <td>Positive</td> <td>Positive</td> <td>Positive</td> <td>Positive</td> </tr> </tbody> </table>		Metric	Standard	3 Prior FY	2 Prior FY	Prior FY	Current YTD	<i>Fiscal Year or Month Used</i>		2019	2020	2021	2022	Unrestricted Days Cash	≥ 30	62.57	95.94	123.5	109.17	Debt to Asset Ratio	≤ 1	.99	.94	.91	.17	Current Ratio	≥ 1	1.49	4.24	6.37	6.2	Audit Findings	0	0	0	0	N/A	Change in Net Assets	Positive	Positive	Positive	Positive	Positive
Metric	Standard	3 Prior FY	2 Prior FY	Prior FY	Current YTD																																						
<i>Fiscal Year or Month Used</i>		2019	2020	2021	2022																																						
Unrestricted Days Cash	≥ 30	62.57	95.94	123.5	109.17																																						
Debt to Asset Ratio	≤ 1	.99	.94	.91	.17																																						
Current Ratio	≥ 1	1.49	4.24	6.37	6.2																																						
Audit Findings	0	0	0	0	N/A																																						
Change in Net Assets	Positive	Positive	Positive	Positive	Positive																																						

# MAP OF PROPOSED LOCATION AREA SCHOOLS





## State Charter School Board Expansion Eligibility Verification Form

**Outcome:**

The Utah State Charter School Board staff has reviewed minimum eligibility requirements, as required in R277-552-6, and found that Excelsior Academy is:

- Eligible to be considered for an expansion request for SY 2021-2022.
- Not eligible to be considered for an expansion request for SY 2021-2022.

**Supporting Evidence:**

The applicant certified all information contained within this application is complete and accurate.

- Yes
- No

The applicant certified that the school satisfies requirements of federal and state laws, regulations, and rules.

- Yes
- No

The application is signed by the Chair of the school’s governing board.

- Yes
- No

<b>Requirement:</b> <i>As per R277-552-6</i>	<b>Evidence:</b> <i>Note: include link or page number if submitting as a packet.</i>	<b>SCSB Staff Verification:</b>
Title 53E, Chapter 9, Student Privacy and Data Protection	Link	X
Title 53G, Chapter 7, Part 5, Student Fees	Link	X
Title 53G, Chapter 9, Part 7, Suicide Prevention	Link	X
Title 53G, Chapter 8, Discipline and Safety	Link	X
Title 52, Chapter 4, Open and Public Meetings Act	Link	X
Title 63G, Chapter 6a, Utah Procurement Code	Link	X



the IDEA and Rule R277-750, with no unresolved audit exceptions	Copies of Audit Reports	X
Rule R277-113, Local Education Agency (LEA) Fiscal and Auditing Policies	Link	X
Section 53G-9-207, Child sexual abuse prevention	Link	X
Subsection 63G-7-301(3) and Rule R277-322, Code of conduct	Link	X
The request is consistent with the charter school's charter agreement.	Link	X
Met all academic goals in the charter agreement.	Data Tables	X
All schools in the charter LEA performed at or above the average student performance of other nearby schools on statewide assessments. (If the charter LEA serves a specialized population according to the charter agreement, the LEA may compare performance to schools serving similar populations.)	Data Tables	X
Financial statements report revenues in excess of expenditures for at least three of the last four fiscal years.	Link	X
If the proposed expansion requires additional physical facilities, maintained a net lease adjusted debt burden ratio of under 25% for each of the last three years.	Link	X