



Charter Proposal

A Utah Public Charter School whose mission is to empower students to live fulfilling, responsible, and successful lives by building on the three foundational pillars of *Prepared Mind*, *Healthy Body*, and *Performance Character*.

3/27/2015

Required Information

Charter School Information

Name of proposed charter school: Athlos Academy of Utah			
Name of applicant: Sean Morris			
Authorized agent: Sean Morris			
Mailing address: Street, City, State, Zip: 1353 West 2050 South Woods Cross, Utah 84087			
5. Phone number: 801-971-4401		6. Email address: sean@blomquisthale.com	
7. District(s) where proposed charter school is located: Jordan			
8. District contact(s) and date complete application submitted to district(s). (NOTE: repeat this statement for each district in which the school may be located.) Submitted to <u>Dr. Patrice Johnson</u> (person) who works at <u>Jordan School District</u> School District on <u>12/10/2014</u> (date).			
9. Form of organization (check) <input checked="" type="checkbox"/> Nonprofit Corporation <input type="checkbox"/> Tribal entity <input type="checkbox"/> Other			
10. The governing body of a charter school is responsible for the policy decisions of the school. Please indicate the makeup of this body below. (Add lines as necessary)			
Name	Email	Type of Member (e.g., parent, business)	Position on Board (e.g., chair, secretary)
Sean Morris	sean@blomquisthale.com	Business	Chair
Andy Lavin	andyla@nbsbenefits.com	Charter School Administration/Business	Vice-Chair
Nichole Coombs	nichole@coombsfamily.org	Public Relations/Parent/Governing Board Experience	Secretary
Lisa Davis	bugfreeworld@gmail.com	Parent/Higher Education (PhD)	Member
11. Year school will start: August 2015		12. Grades served: K-9	

13. Number of instructional days: 180	14. Number of instructional hours: 990
15. Requested Enrollment Operational year 1: Grade K: _104_ Grades 1-6: _624_ Grades 7-8: _104_ Grades 9-12: ____ Total: _832_ Operational year 2: Grade K: _104_ Grades 1-6: 624_ Grades 7-8: _208_ Grades 9-12: ____ Total: _936_ Operational year 3: Grade K: _104_ Grades 1-6: _624_ Grades 7-8: _208_ Grades 9-12: _104_ Total: _1040_ Does proposed grade configuration match resident district grade configuration? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
16. Target percentage of educationally disadvantaged students: 25%	
17. Is this application seeking special treatment under UCA 53A-1a-501.9 ? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	18. Is this application seeking priority consideration under UCA 53A-1a-502.5 ? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
19. A charter school may apply to the State Board of Education for a waiver of any rule that inhibits or hinders the school from accomplishing its mission or educational goals set out in its charter. List any waiver requests here (i.e., Rule numbers. Provide details regarding the need for the waiver as Attachment A).	
20. List persons whom you have designated as founding members of the school. Children/grandchildren of a Founding Member (an individual who has had a significant role in the development of a charter school application), children/grandchildren of an employee, and siblings of students currently attending the charter school are eligible for preferential enrollment under both State and Federal Charter School law. Also, identify the percentage of students eligible for preferential enrollment under the status of founder's child or employee child.	

Assurances

The applicant charter school hereby assures and certifies to the Utah State Charter School Board and Utah State Board of Education that: Read and Check

The charter school will make provision for such fiscal control, fund and program accounting procedures as may be necessary to assure proper disbursement and accounting for all funds, and will utilize fiscal procedures that are consistent with generally accepted standards of fiscal management.

The charter school will not expend program funds for any education program, activity, or service related to sectarian instruction or religious worship.

The charter school assures that resources will be available and a process established to develop a Student Education Plan/Student Education Occupation Plan (SEP/SEOP) for each student.

The charter school will maintain an active parent/guardian involvement process including some formal mechanism for meaningful involvement in site-based decision making.

The charter school will not charge tuition or fees, except those fees allowed by law. Governing Boards will adopt allowable fees annually in an open board meeting.

A copy of the charter will be supplied to interested individuals or groups on request.

The charter school will be fully accredited no later than its second year of operation.

The charter school will acquire and maintain nonprofit corporate status.

The charter school will acquire and maintain all required insurances, including General Liability Coverage for both Bodily Injury and Property Damage Liability at \$2 million per occurrence; perhaps, with an annual aggregate amount; Automobile Liability Coverage for Bodily Injury and Property Damage at \$2 million per occurrence including PIP coverage; Personal Injury / Civil Rights Coverage for claimed Constitutional violations and claimed violations of federal and state law at \$2 million per occurrence; Errors and Omission Coverage for, among other things, actions taken by directors and board members who govern the school at \$2 million per occurrence; Government Crime Policy including employee theft, faithful performance, and coverage for employee and officer bonds; Property Coverages - probably a standard all-risk property policy with possible endorsements for Business Interruption, Extra Expense and Tuition Fee coverage; Workers' Compensation Coverage at such amounts and limits as required by Utah law; and Treasurer's Bond.

The charter school will maintain accurate student transcripts.

The charter school is nonsectarian in its programs, admission policies, and employment practices and all other operations.

The charter school Principal/Director shall attend a one-day special education training class sponsored by the Utah State Office of Education prior to the first day of instruction and annually thereafter.

The governing board will name and provide email contact information for the following individuals prior to opening and at any time the school makes changes to these positions: Board Chair, Executive Director, Principal, Assistant Principal, Assessment Director, Special Education Director, Title IX Civil Rights Monitor Officer, Section 504 Coordinator, and Business Official.

The charter school applicant acknowledges that neither the chartering entity nor the state, including an agency of the state, is liable for the debts or financial obligations of the charter school or persons or entities that operate the charter school.

The charter school applicant certifies all information contained in this application is complete and accurate, realizing that any misrepresentation could result in disqualification from the charter application process or revocation after award. The charter school applicant understands that incomplete applications will not be considered.

The charter school applicant acknowledges that it has read all Utah statutes regarding charter schools and that, if approved, it is subject to and will ensure compliance with all relevant federal, state and local laws and requirements. The charter school applicant acknowledges that, if approved to operate a charter school, it must execute a charter contract with the Utah State Charter School Board within twelve months of the date of approval of the charter by the Utah State Board of Education and must begin providing educational services within the timeframe outlined in the charter. Failure to do so may result in revocation of the charter approval and, if applicable, termination of the contract and revocation of the charter.

The authorized agent of the applicant charter school certifies that, to the best of his/her knowledge and belief, the data in this application are true and accurate, and that the applicant will comply with the assurances noted above if this application is approved. Therefore, this application for charter school status and funding is hereby submitted with the full approval and support of the governing body of the proposed charter school.

sponsored by the Utah State Office of Education prior to the first day of instruction and annually thereafter.

- ✓ The governing board will name and provide email contact information for the following individuals prior to opening and at any time the school makes changes to these positions: Board Chair, Executive Director, Principal, Assistant Principal, Assessment Director, Special Education Director, Title IX Civil Rights Monitor Officer, Section 504 Coordinator, and Business Official.
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III. Signatures

WE, THE UNDERSIGNED, do hereby agree to the certifications contained in *Section II. Assurances* above.

Name of Authorized Agent: Sean Morris

Signature of Authorized Agent



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Executive Summary

Athlos is a Greek word meaning “feat”. A feat is defined as an act of skill, endurance, imagination, or strength; or an achievement. The founders of Athlos Academies (an education service provider) and the founders of Athlos Academy of Utah (the proposed charter school) share the belief that all children are capable of achieving great feats. The Board of Directors of Athlos Academy of Utah will contract with Athlos Academies to provide the Athlos Academies school model in Utah.

Athlos Academy of Utah will provide its students with a superior education that embodies the three pillars of *Prepared Mind*, *Healthy Body*, and *Performance Character* through a rich academic and athletic/fitness curriculum. Instruction will be presented by outstanding teachers working in partnership with families in a values-rich and data driven environment. Through recognizing the importance of educating the whole child, all school staff will teach students the importance of civic virtues.

Led by a visionary Board of Directors including, parents, charter school veterans, and teachers, Athlos Academy of Utah aligns with the belief that all students need a standards-based education. The Board of Directors is chaired by Sean Morris, leader of a mental health provider company and concerned citizen. He is joined by Nichole Coombs, a television producer, charter school governance veteran and parent, Andy Lavin, a former charter school administrator and business leader, and Lisa Davis a parent with a PhD in immunology who believes in and understands the importance of combining a healthy lifestyle with a solid academic experience. Each is dedicated to the successful opening and running of Athlos Academy of Utah. The Board of Directors continues to look for additional members with a diverse skill set, including legal and accounting backgrounds.

The Athlos model is currently operating in seven schools in three states and has proven to be in strong demand in the communities where it is operating.

Athlos Academy of Utah is dedicated to providing a curriculum that supports the mastery of a broad-base of knowledge and skills in all core subjects, creating *Prepared Minds*. The educational foundation at Athlos Academy of Utah will be built upon the Core Knowledge Sequence.

Athlos Academy of Utah believes learning and wellness are inextricably connected. The Athlos Athletic Curriculum is highly engaging for students and families. It draws upon the discipline, motivation, and teamwork of athletics to engage students in becoming more active learners. Improving physical health and athletic skills improves a child’s self-image, increases confidence and energy, improves mental toughness, and the ability to overcome adversity.¹

The academic and athletic programs provide the foundation for the ongoing development of good *Performance Character* in each student, critical for success in life.

¹ Gyamraah, M., Amponash, M. O., & Sackey, N. A. (2013). Psychological profile assessment of mental toughness among senior high school football players in Ghana *European Journal of Educational Sciences*, 1 (3), 136-151.

Section 1: School Purpose

Purpose

In accordance with UCA 53A-1a-503, Athlos Academy of Utah seeks to continue to improve student learning, increase choice of learning opportunities for students, and establish a new model of public schools in Utah.

As outlined in Section 4: Program of Instruction of this document, healthier students with strong *Performance Character* do better academically. The implementation of the Athlos Athletic Curriculum along with the academically sound Core Knowledge Sequence curriculum will assist students in making great academic gains. This curriculum combination meets all three purposes stated above. Detailed information is found in Section 3: Student Population.

Mission

Athlos Academy of Utah empowers students to live fulfilling, responsible, and successful lives by building on the three foundational pillars of *Prepared Mind*, *Healthy Body*, and *Performance Character*.

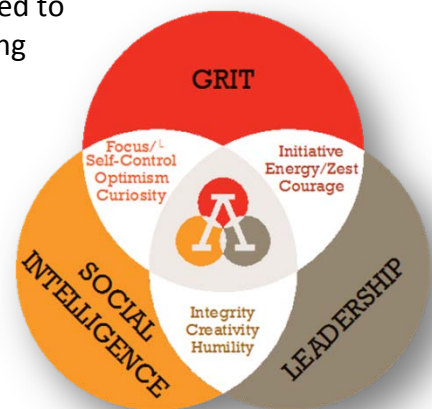
Vision

Athlos Academy of Utah produces students who are well-prepared to face the challenges of life through development of critical thinking skills and a broad knowledge base, healthy lifestyle habits, and cultivation of *Performance Character*. The daily educational experience includes not only a rich and engaging academic curriculum, but incorporates a healthy lifestyle and development of strong character (referred to as *Performance Character* by the Athlos community) through participation in its unique Athlos Athletic Curriculum including physical exercise, good nutrition, and teaching *Performance Character* through activities.

Graduates of Athlos Academy of Utah embody the *Performance Character* Traits, defined by Athlos Academies as twelve qualities a person needs to realize his/her highest potential in any performance environment throughout life, as listed below.

Grit
Focus/Self-Control
Optimism
Curiosity
Initiative
Energy/Zest

Courage
Social Intelligence
Integrity
Creativity
Humility
Leadership



Performance Character is learned and developed in school and at home; and the incorporation of each of these values combines to achieve the greatest of feats in life. Athlos Academy of Utah's commitment is to work with the family in the development of *Performance Character* traits in all students.

Within five years Athlos Academy of Utah intends on being one of the top academic performing schools in the state, with ninety percent of student's proficient on state standardized tests. Students will leave Athlos Academy of Utah well-prepared for taking and succeeding in honors, concurrent enrollment, and/or advanced placement (AP) courses in high school. The graduating students of Athlos Academy of Utah will have the skills to live a healthy and well-balanced life and manage the demands of high school, college, and life.

Educational Philosophy

Athlos Academy of Utah asserts that learning and wellness are inextricably connected. Students spend time developing athletic skills (*Healthy Body*) combined with classroom learning (*Prepared Mind*). *Performance Character* traits are taught in the Athlos Athletic Curriculum activities, reinforced through the study of literature, history, and science, and applied in various situations, both inside and outside of school. By focusing on each of these pillars, students become prepared for success in any environment.

The Athlos Athletic Curriculum is highly engaging for students and families. Our education program draws upon the discipline, motivation, and teamwork of athletics to engage students to become more active learners. As mentioned previously, improving physical health and athletic skills improves a child's self-image, increases confidence and energy, improves mental toughness, and the ability to overcome adversity. E.D. Hirsch's Core Knowledge Sequence serves as the academic foundation of the school, offering students a broad base of knowledge in language arts, math, social studies, science, and the fine arts. The curriculum is taught across subject areas, and builds on an existing knowledge base.

Students in the early grades receive a greater amount of direct instruction during language arts and math, with some hands-on projects and group activities occurring in social studies, science, fine arts, and the Athlos Athletic Curriculum. As students progress through Athlos Academy of Utah, the amount of time spent working individually or in groups on projects and activities learning and applying skills increases, while direct instructional time decreases. It is important students understand why they are learning something—when it is relevant they are more likely to have a desire to fully understand and utilize what they are being taught. Participating in hands on, project based learning types of activities creates a bridge of understanding, helping students realize the “why”.

The academic and athletic programs provide the foundation for the ongoing development of strong *Performance Character* in each student.

School Culture

The school culture will be built around the three pillars of *Prepared Mind*, *Healthy Body*, and *Performance Character*. As the *Performance Character* traits are taught and reinforced throughout the school, the culture will be one of respect and caring. The reflecting on and measurement of *Performance Character* traits will serve to help students desire and achieve great *Performance Character*. As students participate in the Athlos Athletic Curriculum, they will be building healthy bodies, which in turn help in their ability to focus while in school (research provided in Section 4: Program of Instruction). Implementation of the Core Knowledge Sequence curriculum will foster a love of learning and provide students with a great depth and breadth of knowledge to draw from in their future academic and career pursuits.

Mission Specific Goals

Goal	Metric	Measure
Athlos Academy of Utah will provide a curriculum that supports the mastery of a broad-base of knowledge and skills in all core subjects.	Professional Development training logs.	Every school year, 100% of Athlos Academy of Utah teachers will participate in a minimum of 10 hours of training directly related to core subjects and/or instructional methods.
8 th graders who graduate from Athlos Academy of Utah will be well-prepared for taking and succeed in honors, CE and AP courses in high school.	Letter of Recommendation	75% of 8 th graders, who have been enrolled at Athlos Academies for a minimum of three consecutive years, will receive a recommendation for advanced course placement by at least one core subject teacher based on the student's academic achievement, performance character scores, and overall teacher recommendation.
8 th graders who graduate from Athlos Academy of Utah will have the skills to live a healthy and well-balanced life and manage the demands of high school college and life.	FitnessGram and Athlos Academies Performance Character Report Card	100% of students who have been enrolled at Athlos Academy of Utah for three years will demonstrate growth in both FitnessGram national standards and the Athlos Academies Performance Character Report Card.
It is important students understand why they are learning something – when it is relevant they are more likely to have a	Percentage of students who complete the portfolio project each	100% of Athlos Academy students in grades 4-9 annually will compile a portfolio of examples from history demonstrating how Performance Character traits, or lack thereof,

desire to fully understand and utilize what they are being taught.	school year.	have influenced society.
Improve each child's self-image, sense of self-confidence, and ability to overcome adversity.	Student Survey	90% of Athlos Academy of Utah students will an increase or will maintain high levels of confidence and self-image on a standardized student survey administered each spring.
Whether or not a child becomes an athlete in the traditional sense, all children will benefit from developing a healthy body.	BMI	90% of Athlos Academy of Utah students will achieve a healthy body weight as measured by BMI after three years in the program.
The Three Pillar program develops a sense of discipline, work ethic, integrity, leadership, and teamwork.	Athlos Academies Performance Character Report Card	90% of Athlos Academy of Utah students will annually score a 3.5 or higher on the Performance Character Report Card by the end of the last grading period of the school year.
Implementation of the Three Pillar program results in a greater level of physical fitness for students.	BMI	The number of Athlos Academy of Utah students who are considered obese based on Fall BMI calculations will decrease by 20% by the end of each school year.
As the performance character traits are taught and reinforced throughout the school, the culture will be one of respect and caring.	Annual Stakeholder Survey	90% of Athlos Academy of Utah stakeholders surveyed will report a positive school culture.
Athlos Academy of Utah will adopt an effective data analysis system that will assist the administration and teachers in ensuring that each student's learning needs are met.	Board meeting minutes	By the end of the school's second year of operation, the Athlos Academy of Utah Board of Directors will review a comprehensive and balanced assessment system, developed by the school's administrator, comprising of formative, interim, and summative assessments.
By its fifth year of operation, Athlos Academy of Utah intends on being one of the top academic performing schools in the state.	SAGE exams	90% of Athlos Academy of Utah students will achieve proficiency on SAGE testing within five years of implementation.
The implementation of the Three Pillar program will result in higher academic achievement. Healthier	FitnessGram; Athlos Academies Performance	100% of students who have been enrolled at Athlos Academy of Utah for three years will show a positive correlation between



students with strong performance character do better academically	Character Report Card; SAGE exams	FitnessGram measures, attainment of performance character traits, and standardized tests.
The Board of Directors of Athlos Academy will provide high quality governance for the school.	GBOT Module Quizzes	100% of board members will pass the GBOT modules with a score of 80% or higher within six months of joining the board.

Charter Fidelity

The Athlos Academy of Utah Board of Directors will develop a strategic plan in cooperation with school administration, as planning, goal setting, and evaluation are important for the success of the school. Goals will encompass both short and long-term objectives. This plan will be reviewed and updated annually, and progress monitored at least three times per year in an open public meeting. The Board of Directors may create subcommittees to assist school administration in solving problems or implanting plans to achieve goals.

Target Population

Athlos Academy of Utah seeks to educate any child living in the Jordan School District area who desires an enriching academic experience combined with developing healthy lifestyle and athletic skills in preparing for future success while building strong *Performance Character* traits. Athlos Academy of Utah intends to serve students in grades K-9, with 104 students in each grade, for a total of 1,040 students. There is not a specific sub-group of the population the school is targeting, as the mission, vision, and curriculum are applicable and beneficial for the general population.

Meeting the Needs of the Target Population

The rich curriculum of Athlos Academy of Utah is attractive to students seeking a well-rounded education, and particularly to those students who want and/or need to develop a healthy lifestyle. The traits developed through *Performance Character* are beneficial to all students, and prepare them for life-long success. While Athlos Academy of Utah does not specifically target special populations, it is equipped to meet the needs of learners who are gifted, require 504 modifications, are English Language Learners, come from lower socioeconomic backgrounds, and/or have special education needs.

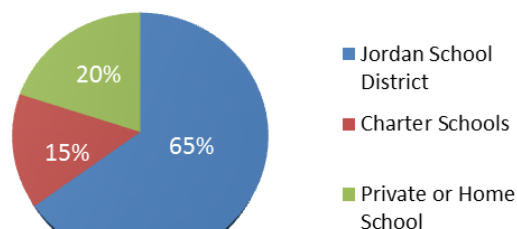


Section 2: Market Analysis

Educational Landscape

Athlos Academy of Utah intends to locate in the Jordan School District, one of the fastest growing districts in the state, and home to multiple charter schools, as well as one traditional private school. While several of the charter schools in the area use some of the curriculum employed by Athlos Academy of Utah (Core Knowledge, Saxon Math, and Spalding Language Arts), none of them have placed them in the context of athletics or have the comprehensive *Performance Character* program and emphasis. Of the eight charter schools in the Jordan District serving any of the same grades as Athlos, only one is an official Core Knowledge School, and two others utilize the history portion of Core Knowledge.

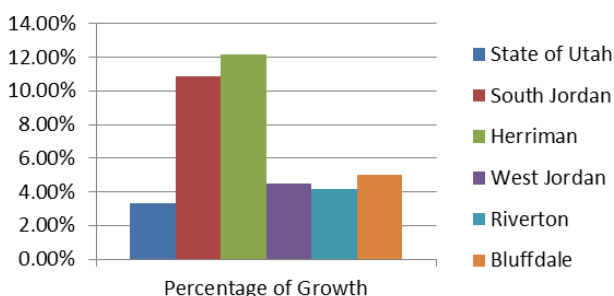
Enrollment by School Type in Jordan School District, 2012



The Jordan School District currently has 52,000 students enrolled², and covers the cities of Bluffdale, Copperton, Herriman, Riverton, South Jordan, and West Jordan. The following graph shows distribution of students among the various types of schools. Data from the US Census Bureau was used to determine total number of students living in the Jordan School District boundaries, from which percentages enrolled by school type were calculated.

Athlos Academy of Utah has located multiple sites that would accommodate the facility across the quickly growing district. While the West Jordan area is growing a little more slowly than other areas, the schools are still very crowded and operating in many cases on year-round schedules and with multiple portable classrooms.

**Percentage of Population Growth
April 1, 2010-July 1, 2012**



According to US Census data released in May 2014, South Jordan is listed as the third fastest growing city over 50,000 residents in the county, with a growth rate of 6.1% from July 2012 to July 2013³. From April 1, 2010 to July 1, 2012, the growth rate was 10.9%⁴. Surrounding cities also located in the Jordan School District are also experiencing large amounts of growth. Herriman City had a

² <http://hr.jordandistrict.org/FactsAboutJSD.html>

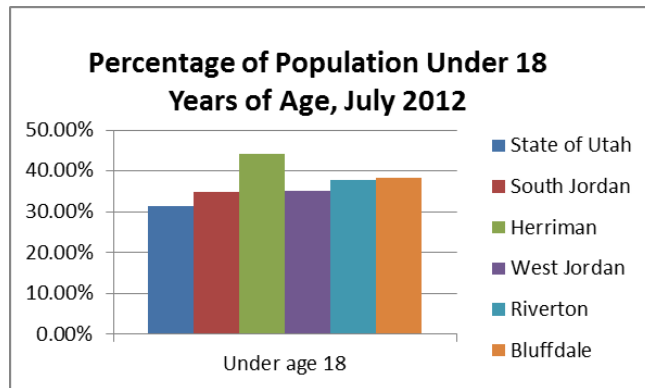
³ <http://www.census.gov/newsroom/releases/archives/population/cb13-94.html>

⁴ <http://quickfacts.census.gov/qfd/states/49/4970850.html>



growth rate of 12.2% from April 1, 2010 to July 1, 2012⁵, and West Jordan grew 4.5% during the same time⁶. The following graph illustrates the significant growth, especially when compared with the Utah State average of 3.3%⁷.

As a result of this rapid growth, the Jordan School District is experiencing significant overcrowding. According to information released to the public in June 2013, the Jordan School District cited expert projections which indicate student enrollment could increase by more than 29,000 students in the next ten years⁸. Current student enrollment in the district is around 52,000, meaning the school district will increase by nearly 50%. In the same



report, the district estimates that 19 new schools will be necessary to accommodate the enrollment increase. In November 2013 voters in the Jordan School District rejected the district's request for a multi-million dollar bond to build new buildings, leaving the district with tremendous facility challenges. More public school seats are desperately needed in the district, and with voters not passing the bond, an increase in charter schools in the district will help alleviate some of the burden. Currently many schools in the district are on a year-round schedule and junior high schools have upwards of twenty portable classrooms. Census data reveals the higher-than-average youth population, as illustrated above.

Schools in this area tend to be less ethnically diverse (24% versus a state average of 38%) and have a lower percentage of students receiving free or reduced lunch (21% versus a state average of 21%)⁹.

There is a slightly higher than average number of students attending charter schools in the Jordan School District than the state average in all grades, probably due, at least in part to the overcrowding of the district. According to the latest available data, 9% of public school students statewide are enrolled in charter schools, while 10% of public school students in the Jordan School District are enrolled in charter schools.¹⁰

The following map shows all district elementary and junior high schools, as well as charter schools offering any configuration of K-9 in the Jordan School District boundaries.

⁵ <http://quickfacts.census.gov/qfd/states/49/4934970.html>

⁶ <http://quickfacts.census.gov/qfd/states/49/4982950.html>

⁷ <http://quickfacts.census.gov/qfd/states/49/4982950.html>

⁸ <http://jordandistrict.org/2013/06/proud-of-patron-participation-in-growth-survey/>

⁹ Utah State Office of Education, Data and Statistics

¹⁰ Utah State Office of Education, FY13 Average Daily Membership report



athletic space and equipment requirements. However, based on enrollment and waiting lists in other areas where Athlos schools are operating and the extreme overcrowding in the Jordan School District, the Board of Directors is confident the school will quickly fill to capacity. Two charter schools serving students in the elementary grades with an emphasis that has a broad appeal opened in 2014, Ascent Academy in West Jordan and Mountain West Montessori Academy. According to USOE data, Ascent was 95% full on October 1 and Mountain West Montessori Academy was 99% full. This data provides the Board of Directors with even more confidence in the ability to open with and maintain a full enrollment. The configuration of a kindergarten through ninth grade set up was determined in part by the Core Knowledge curriculum, and in part by the Athlos Academies model. Other schools in the area with a K-9 configuration are full and doing well. Enrollment and waiting list information for other Athlos Academies schools is referenced in Section 3: Student Population.

The Athlos Difference

The focus on the whole child offered by Athlos sets it apart from private, district, and other charter schools. While other schools offer the Core Knowledge program, Saxon math, and Spalding Language Arts, none have the specific Athlos *Performance Character* or Athlos Athletic Curriculum that combine with the academic program to prepare students to handle whatever life may hand them in a positive and constructive way. This powerful combination not only sets the school apart from others, but is very compelling to families. Athletics is a nearly-universal forum that students of all abilities can relate to and enjoy, further encouraging enrollment in the school.



Section 3: Student Population

The Athlos Academies model has proven to be very popular in areas where it is currently operating as evidenced by full enrollment and long waiting lists. This includes communities of various demographics in Arizona, Texas, and Minnesota. The Jordan School District area has a high participation rate in various sports programs offered through public recreation centers, club organizations (i.e. little league football, competitive soccer), and in the district's secondary schools. This interest in sports is a potential indicator of interest in the Athlos model. The following chart demonstrates the high demand for the Athlos model in other states.

School	Authorized Seats	Enrolled Count Day 1 ¹²	Enrolled Count December 1, 2014	Number on Waiting List
International Leadership—Garland, TX	1900	1291	1403	1518
International Leadership—Arlington, TX	1600	1263	1389	2320
International Leadership—Keller, TX	1400	1324	1375	3120
Athlos Academies—Brownsville, TX (opened 2014)	1100 (855 for first year per growth plan)	916	910	1949
Athlos—San Antonio, TX (opened 2014)	1100	1095	1062	890
Athlos—Brooklyn Park, MN (opened 2014)	1180	1085	1055	150

¹² Numbers for Day 1 enrollment and December 1 enrollment were confirmed on 3/26/15 with all three International Leadership Schools.

With the Jordan School District exceeding capacity, Athlos is confident the school will be able to meet target enrollment. During the 2014-2015 school year two new charter schools serving grades Athlos will also serve opened. According to the October 1 enrollment count, Ascent Academy, which uses parts of Core Knowledge, was enrolled at 95% capacity. Mountain West Montessori Academy opened at 99% capacity. Ascent Academy's program is set up to provide a solid academic education for all students, similar to the academic approach of Athlos Academy of Utah. Due to overcrowding and year-round schedules, many parents are choosing charter schools. In the Jordan District there is only one official Core Knowledge school (North Star Academy, which was 99% full for the 2014-2015 year), and two other schools utilizing parts of Core Knowledge (Navigator Pointe Academy and Ascent Academies). The remaining four charter schools in the district serving similar grades do not utilize the Core Knowledge curriculum.

Given the enrollment trends for charter schools in the Jordan School District and the high demand for the Athlos model in other states, the Board of Directors is confident the school will fill to capacity. Nationally, schools using the Athlos Academies model have a strong enrollment and retention rate.

Intended and Likely Population

Athlos Academy of Utah intends to serve any student in the area who desires a well-rounded education in the context of developing healthy lifestyle habits and truly great *Performance Character*. As a result of the broad market, Athlos Academy of Utah anticipates educating a wide ability spectrum of students, and is prepared to meet their needs. As outlined in Section 4: Program of Instruction, the academic curriculum selected is appealing and applicable to all subgroups of students. Accommodations can be made in the Athlos Athletic Curriculum to accommodate students with disabilities.

Meeting the Needs of the Target Population

All people need to develop strong *Performance Character* to achieve the highest levels of achievement. Possessing a large body of knowledge, critical thinking ability, and living a healthy lifestyle allow people to choose their future. Data in Section 4: Program of Instruction validates this assertion.

Special Education

Athlos Academy of Utah will serve students with special education needs in compliance with state and federal laws.

Services and Placement

All special education services at Athlos Academy of Utah will be in compliance with the Individuals with Disabilities Education Act (IDEA) as it was reauthorized in 2004 and State of Utah Special Education Rules. Section 504, accommodations for regular education students are also followed



as directed by law. The Special Education Director will oversee the special education department, staffed by properly licensed teachers and paraprofessionals. In addition to special education teachers and aids, Athlos Academy of Utah will hire or contract with ancillary service providers, including but not limited to, psychologists, speech-language pathologists, occupational therapists, and physical therapists as needs are identified in individual education plans (IEP). Athlos Academy of Utah administration will closely monitor special education caseloads, and adjust staffing as necessary. Funding will come from special education monies, and if necessary, the general school budget, in compliance with Athlos Academy of Utah Fiscal Policy.

All students are entitled to a free and appropriate public education (FAPE). Athlos Academy of Utah provides services along a continuum, making sure students receive their education in the least restrictive environment. Some general education students may require one or more accommodations to receive FAPE, and will then be placed on a 504 plan. Students requiring academic instruction or related services in addition to those provided in the regular classroom setting will have an IEP in place. The IEP will determine type(s), frequency and location(s) of service; services may happen in or outside of the regular classroom, for varying amounts of time, based on individual student needs. Some students may receive services through a regular education teacher who is receiving consultation and support from the special education staff. Direct services to students may include receipt of supplemental instruction individually or in a small group setting within the classroom by a special education or regular classroom teacher, an instructional aide being assigned to help within or outside of the classroom, instruction outside of the classroom setting (pull-out), placement in a self-contained classroom, or home and hospital instruction. Athlos Academy of Utah has classrooms dedicated to special education, and the entire school building, including restrooms, classrooms, playgrounds, playground equipment, and building accesses will meet the Americans with Disabilities Act (ADA) accessibility requirements.

Athlos Academy of Utah will utilize the response to intervention (RtI) approach for all students who may be struggling with academic skills. With this approach, a teacher identifies the area(s) in which a student is struggling. Strategies are then determined by the teacher and parent, with or without special education consultation, which may be beneficial to the student. If these are not successful, special education consultation and testing will begin in accordance with procedural safeguards. It is the intent of Athlos Academy of Utah to provide all students with skills and supports necessary for academic success. One of these tools may be extended school year (ESY) services, which will be addressed in the IEP meeting. Any student qualifying for ESY will receive academic services during the summer at no cost to the family. ESY services may also address social, behavioral, and communication needs.

Qualified Staff

All special education staff at Athlos Academy of Utah will be properly licensed and endorsed to work within the special education program. Athlos Academy of Utah assures that necessary educational staff and related service providers will be available to ensure all requirements of FAPE are met, in compliance with USBE-SER IX.F. The special education teacher(s) will hold a valid educator's license with the appropriate special education endorsement, and all related services



providers (i.e. speech language pathologist, occupational therapist, physical therapist, social worker, adaptive physical education specialist, and psychologist) will have valid licenses specific to their disciplines, in compliance with USBE-SER IX.D and IX. H. The Director of Athlos Academy of Utah is responsible for making sure all providers are properly licensed and certified.

The Special Education Director of Athlos Academy of Utah will be familiar with USBE-SER, and will receive ongoing training in USBE-SER through interaction with the Utah State Office of Education Special Education Department. He or she works closely with the special education staff of the school, and all receive annual training regarding policy, procedure, and best practices. An annual report to the Board of Directors will indicate the type and amount of training received, as well as a schedule for trainings in the coming year.

The Director and Business Manager will receive training regarding allowable uses of restricted IDEA and Utah State special education funds in compliance with EDGAR, OMB A-133, and USBE-SER IX and X. They will be responsible for ensuring adequate documentation is maintained and available to support the use of all restricted funds.

Policies

Athlos Academy of Utah will provide the Utah State Office of Education a Special Education Policies and Procedures Manual for approval prior to November 1 of the first operational year. This manual will be in compliance with Utah State Board of Education Special Education Rules and IDEA, as it was reauthorized in 2004. Staff will be provided with ongoing professional development in key areas identified by the Director and special education department.

Child Find

In order to locate students needing special education services, Athlos Academy of Utah will actively participate in child find activities. Upon entrance to the school, initial paperwork will ask if the student has a current IEP. If an IEP is in place, records from the previous school will be requested and special education services will begin immediately in accordance with the existing IEP. The IEP team will then determine whether to adopt the existing IEP or convene a meeting for the purpose of constructing a new IEP. Teachers will receive training on identifying students who may have special education needs at the beginning of each year, with ongoing training through staff meetings or written communication from the Director and/or special education department. In addition, teachers will be provided additional training in all other relevant topics in regards to special education as needed throughout the year.

Procedural safeguards are in place and compliant with IDEA laws. When a child is identified as potentially needing special education services, a request for an initial evaluation is made to the special education department. This request can be generated by a parent or teacher. Before testing can begin, the parents must sign a “consent to test” form. Upon receipt of the consent to test, the initial evaluation to determine eligibility for IDEA Part B services must be completed within 45 days. If the referral is generated by Athlos Academy of Utah and parents do not return or refuse to sign the consent to test, the initial evaluation may occur under the due process



procedures established by the USBE-SER. Evaluations will utilize a variety of appropriate assessments, both formal and informal, and will be comprehensive enough to adequately address all areas of need. All assessments will be valid and reliable, and administered by trained and qualified personnel. Observations may also be included as part of the assessment. Parents will receive a copy of the evaluation results, and if the student is determined to be eligible for Special Education, an IEP meeting is scheduled.

Parents will receive a prior written notice about the meeting, which will indicate the mutually agreed upon time, location, purpose of the meeting, as well as who will be in attendance. Parents must also receive a copy of procedural safeguards prior to the beginning of services, and annually thereafter. The IEP meeting is held within 30 calendar days of eligibility determination with the IEP team, which will include all of the following:

- Parent(s)
- At least one of the student's regular education teachers
- Special education teacher
- Local Education Agency (LEA) representative (Special Education Director at Athlos Academy of Utah)
- Someone who can interpret assessment results to the team, and may be one of the team members listed above

The team may also include any of the following:

- Related service providers
- The student, whenever possible and appropriate
- Someone with special knowledge or expertise if invited by the parent, or Athlos Academy of Utah with parental consent

Should a parent not be able to attend the IEP meeting, alternative participation methods such as conference calls or video conferences may be utilized. A meeting may be conducted without a parent present if Athlos Academy of Utah has made and kept record of attempts to arrange a mutually agreed upon time and place. Records will include actual and attempted communication made and results thereof. Copies of correspondence and any responses, as well as detailed records of visits made to the parent's home or place of employment and results of those visits.

During the IEP the type(s) of service the student needs, along with where they will occur and the frequency and duration (defined as placement) will be determined. The IEP must include a statement of the student's present levels of academic achievement and functional performance, including how the student's disability affects the student's involvement and progress in the general education curriculum. It must also include measurable goals designed to meet the student's needs resulting from the disability that allow the student access, involvement, and progress in the general education curriculum. They must meet any other educational needs resulting from the disability, assistive technology the student may need, how progress will be measured and reported, and alternative assessment means and methods with justification if it is

determined the student is unable to use the regular State-wide assessments. Other elements may be included as determined by State and Federal law. The IEP is valid for one year, and must be reviewed and have a new IEP in place prior to the expiration of the current IEP. A meeting to review and/or revise a current IEP may be held at any time, and must follow the procedural safeguards of a regular IEP meeting.

Special Education Records

If parents have complaints, all grievance policy, as laid out in the most current USBE-SER will be followed (last updated November 2013). This includes requests for amendment of student records as well.

The special education department, under the direction of the Special Education Director, will maintain proper forms and paperwork that are available and used, including, but not limited to:

- | | |
|------------------------------------|---|
| 1. Procedural Safeguards Notice | 11. Transition Plan |
| 2. Prior Written Notice | 12. Services Plan |
| 3. Notice of Meeting | 13. Consent for Initial Placement |
| 4. At Risk Documentation | 14. Change of Placement |
| 5. Referral | 15. Notice Regarding Age of Majority Rights |
| 6. Consent to Evaluate/Re-evaluate | 16. Summary of Academic Achievement and Performance |
| 7. Review of Existing Data | 17. Record of Access |
| 8. Evaluation Summary Report | 18. Access Authorization |
| 9. Determination of Eligibility | |
| 10. Individual Education Program | |

When a student on an IEP or 504 plan transfers to Athlos Academy of Utah from another school, the special education department will conduct a review of the records within thirty days, and then do one of the following:

If the student has transferred from within the state, the team will adopt the previously held IEP, or develop, adopt, and implement a new IEP that is consistent with Federal regulations and USBE-SER rules. If the student has transferred from out of state, the IEP team will conduct an evaluation, if determined to be necessary by the LEA; and develops a new IEP, if appropriate, that is consistent with Federal and State law.

All transferring students will receive services similar to those required in the existing IEP until the review has been completed and the previous IEP adopted or a new one is adopted and implemented.

All Federal Education Right to Privacy Act (FERPA) laws will be followed at Athlos Academy of Utah. The confidentiality of personally identifiable information at collection, storage, disclosure, transfer, and destruction stages will be protected and handled in a timely manner. The Director has responsibility for ensuring this confidentiality, in conjunction with the Special Education Director. All persons collecting or accessing student information are required to receive

instruction regarding policies and proper procedures for safeguarding information. A current list of staff with access to records is posted for public inspection, and records are kept in a locked filing cabinet in the Special Education Director's office. A record is kept in each file documenting persons who have reviewed the file, including the name of the party, the date access was given, and the purpose for which the party is authorized to use the records. Additionally, parents must be given access to records when requested unless Athlos Academy of Utah has been advised the parent does not have legal access to due guardianship, separation, or divorce situations.

Parents must receive notice prior to records being transferred, and when collected personally identifiable information is no longer needed, the parents (or student if age 18 or older) must be notified, and information must be destroyed at their request. A permanent record of student's name, address and phone number, grades, attendance record, classes attended, grade level completed, and year completed shall be maintained without limitation. Records may be considered "no longer needed" and may be destroyed three years after the student graduates or three years after the student turns 22. In accordance with FERPA, the rights of privacy afforded to parents are transferred to the student at age 18, unless declared incompetent by a court order. Prior written notice will be provided to the student and the parent.

English Language Learners

Athlos Academy of Utah will comply with all state and federal laws and rules as they relate to providing services to English Language Learners (ELs).

Upon identification of a student requiring ELL services, a plan for instruction will be put in place depending on current level of proficiency. Athlos Academy of Utah provides a continuum of services for ELs students, based on a three-tier model, as outlined below. An ELL coordinator (a teacher on staff with an ELL endorsement) will determine the needed level of support and work with teachers to ensure all services are being delivered. Athlos Academy of Utah will recruit teachers who possess an ESL endorsement, hopefully having at least one ESL endorsed teacher in each department.

Sheltered English Instruction is the primary method used for ELs at Athlos Academy of Utah. Sheltered instruction helps teachers create lessons and scaffold activities that build on students' prior knowledge, helps students learn to use the academic language required of them, and allows them to do something purposeful with that new knowledge. This method is best suited for students who have already developed a foundation in the English language.

When a student's level of proficiency does not permit them to function and learn in the classroom using Sheltered English Instruction, ELL pull out services will be provided. These will typically be in small groups, determined by level of language proficiency.

If students require intensive ELL services, structured English Immersion will be utilized. In this setting students are provided with intensive English language instruction while receiving some or all of the core content in their native language while they are gaining proficiency.

Throughout the school, staff will utilize a range of research-based instructional methods that assist English Language Learners. This includes Total Physical Response, and Academy Language Scaffolding and other methods¹³. The school's staff will be using Professional Learning Communities to further innovate teaching strategies for English Language Learners.

Students will continue to be assessed using formative and summative assessment, with proficiency being determined by the WIDA ACCESS assessment tool. As students achieve full proficiency, they will be exited from the program and monitored for two years. If at any time during the monitoring time it is determined a student needs to receive additional ELL services the process is started again.

Homeless Students

In compliance with the McKinney Vento Education Assistance Act, Athlos Academy of Utah will serve homeless students, permitting them immediate access to the school if space is available regardless of whether necessary documentation (i.e. immunization records, birth certificate) is available or not, will appoint a homeless liaison, and provide other services as dictated by law.

Section 504 Services

In cases where a student at Athlos Academy of Utah requires one or more accommodations in order to receive FAPE, an accommodation plan will be put in place as required by section 504 of the Rehabilitation Act of 1973. The special education department will oversee development, implementation, and oversight of such plans under the direction of the school Director.

Outreach and Recruitment

Athlos Academy of Utah will use a variety of active and passive means in reaching out to the community, including those traditionally less informed about school choice options, as outlined below.

Site Billboard and Onsite Staffed Admissions Trailer: During construction of the facility, Athlos Academy of Utah will utilize its relationship with the developer to place a billboard at the school construction site. A trailer on the building site will be staffed during normal business hours by school staff conducting outreach activities and will include informational packets and enrollment forms.

¹³ http://educationnorthwest.org/webfm_send/459

Construction Site Signs: Construction site signs will be placed at two site locations that are determined to be most visible and effective for communicating to traffic and local audience. The site billboards will include a school rendering, site plan, and the school's name, phone, and website information needed for enrollment.

Public Parent Meetings: The Board of Directors and school leadership will conduct public parent meetings as necessary. Meeting notifications will be communicated through community partnership platforms, press releases, on the school website, and through the school's contact lists. These venues are effective platforms to build the enthusiasm for the school by describing the school's unique academic and fitness programming and opportunities for parental involvement, including participation on the board.

Direct Mailings: Athlos Academies will blanket the community with direct response mailings and will purchase target mailing lists. Informational mailings will target the primary attendance area and generate interest in enrollment.

School Website: Athlos Academy of Utah will launch a school website that provides information about the school's vision, mission and programs. It will also provide the option to complete an online enrollment application or print a hard copy, and it will give parents the opportunity to register for Athlos Academy of Utah's mailing lists. The website will also track the progress of the building site and include pictures of the facility during its development. The school website will meet all requirements set out by USBE Rule.

Press Releases: On an ongoing basis, Athlos Academy of Utah will release statements to the press notifying them of progress and programs and purchase advertising space in local publications to help in its efforts to create awareness in the community. This will include periodic releases to local newspapers that highlight building progress and enrollment successes.

Word of Mouth: Word of mouth will be essential to Athlos Academy of Utah's ability to achievement enrollment targets, therefore Athlos Academy of Utah will work diligently to engage the parents and community leaders who have expressed interest and give them the tools and materials necessary to encourage other families to consider Athlos Academy of Utah as an educational choice for their children. This will be accomplished through a database system that tracks all contact information for people who have expressed an interest and/or enrolled their child at the school. Athlos Academy of Utah will send out frequent email updates, through an effective system, such as Constant Contact, of the school's progress and include information and enrollment materials these primary contacts can use to inform others. Athlos Academy of Utah will also identify parents and community members who are enthusiastic about the school and engage them in outreach and enrollment activities, including taking part in the public parent meetings.

Social Media: Athlos Academies will execute an ongoing social media campaign. Social media outlets, including the school's website and the Athlos App, will be managed jointly by Athlos Academy of Utah and Athlos Academies.



Facility Tours: Prior to school opening and subject to construction timelines, the facility will be open for tours for the general public. Athlos Academy of Utah believes onsite tours will only increase enrollment numbers by providing families with the opportunity to see the innovative facility.

Community Centers and Team Sports: Athlos will reach out to the local public and private recreation centers and sports clubs to provide marketing information to participants and their families.

Admission and Enrollment

Any student living in the state of Utah is eligible to apply for admission to Athlos Academy of Utah. The school will not discriminate against any individual on the basis of race, national origin, gender, religion, or socioeconomic status and will be in compliance with IDEA and ADA legislation. Once a student is enrolled at Athlos Academy of Utah, they need not apply for the lottery each year. If a student leaves Athlos Academy of Utah and later desires to return, they will not receive preferential enrollment unless there are extenuating circumstances and preferential status is approved by the Board of Directors in accordance with established board policy.

Athlos Academy of Utah will advertise an open enrollment period of at least thirty days annually. If more students enroll than there are seats available, a lottery will be held. This lottery will be in compliance with all applicable state and federal guidelines, as presently constituted and as they are updated in the future. Current state law is UCA 53A-1a-506.

For those members of the community who are designated as founding members, their children may receive preferential enrollment. A founding member is defined as a person who has played a key role in the establishment of the school, and will be determined by the founding board prior to the lottery for the school's first year. Children of full-time staff are also eligible for preferential enrollment. Students receiving preferential enrollment will not exceed 5%. A monetary fee or donation of time, goods, or services is prohibited by Athlos Academy of Utah as a mode of securing student acceptance at the school, and a fee to attend the school is not assessed.

Siblings of current Athlos Academy of Utah are exempt from the lottery, provided parents provide the school with notice of intent to enroll prior to the lottery.

Lottery Policy

Opening Year Lottery

Athlos Academy of Utah will conduct an open enrollment period from January 1 through February 15, during which the school will conduct extensive advertising of the school. Families will be able to attend an open house in order to better understand the mission, expectations and programs of



the school. Enrollment for the lottery will be done electronically through the school's website. A lottery open to the public will be held between February 20 and March 1, as determined by school administration. The lottery procedure will be as follows:

Each student applying will receive a number through a random lottery.

Grades will be filled beginning with tenth grade and working down.

Siblings automatically gain admittance once one member of the family is selected in the opening year lottery, unless there is no room in the specified grade.

Siblings who are not selected through the lottery will be placed on the sibling priority list. These students will be the first contacted when seats in corresponding grades become available.

The sibling priority list will be compiled based on original lottery number.

General Lottery Procedure

Athlos Academy of Utah will conduct an open enrollment period annually from January 1 through February 15, during which time advertising of the school will occur within the community.

Families will be able to attend an open house in order to better understand the mission, expectations and programs of the school, and enrollment for the lottery will be done electronically through the school's website. A lottery open to the public will be held between February 20 and March 1, as determined by school administration. The lottery procedure will be as follows:

Under Utah code 53A-1a-506(2)(b)(i and ii) returning students and siblings of returning students will be given preferential enrollment on a space available basis. Any siblings not given preferential enrollment due to space unavailability will be placed at the top of the wait list. If there are additional seats available and more students applying than available seats, a lottery will be held, as follows:

Each student applying will receive a number through a random lottery.

Available seats will be filled starting with twelfth grade and working down.

Siblings of students selected in the general lottery will be granted sibling preference in compliance with Utah Code 53A-1a-506(2)(b)(i and ii) or placed on the sibling priority list.

Students who gain enrollment via sibling preference will maintain such preference as long as the originally selected sibling remains enrolled at the school.

The sibling priority list will be compiled based on original lottery number.

Students not selected in the lottery or on the sibling preference list will be placed on the waiting list after sibling preferences in order of lottery selection number.

Enrollment Preference

In compliance with Utah Code 53A-1a-506(2)(b)(i and ii) the following categories of prospective students receive enrollment preference, not to exceed 5% of maximum enrollment which only applies to students of founders and children of teachers/staff:



Students of Founding Members: Founding Members are defined as those who have actively participated in the development of the school as determined by the founding board.

- Students enrolled the previous year.
- Siblings of students currently enrolled.
- Children of full-time teachers and other staff as allowed by law.

Exceptions to Enrollment Preference

Athlos Academy of Utah recognizes that it is not in the best interest of a child to be moved from school to school. Unnecessary change can cause lack of continuity in curriculum and can hamper a feeling of community for the child and family. For that reason exceptions to the enrollment preference list are as follows:

Children of founding members who leave the school will not be given priority if they return unless there are extenuating circumstances such as, but not limited to, family illness or military duty. Such situations will be reviewed by the Board of Directors on a case by case basis.

Students who leave the school, and have a remaining sibling, will not be put on the sibling preference list if they wish to return. They may participate in the general lottery.

Accepting Admission and Forfeiting Admission

Students who are selected through the first lottery to attend Athlos Academy of Utah will be notified by email, phone call, and/or U.S. mail of their acceptance. It is the parent or guardians' responsibility to make sure all contact information is correct and accurate. Parents will have two weeks from the date of the first lottery to respond by returning the acceptance form by email, in person or via U.S. mail. Forms returned by U.S. mail must be delivered to the school by the due date.

Students who do not respond within the two week period forfeit their enrollment spot can reapply for the lottery during the next open enrollment period, generally the following year or placed at the bottom of the wait list for the current year. If there are additional available seats, another round of acceptance phone calls and emails will be issued. Students in the second and subsequent rounds will have five business days from the notification date to respond or their seats will be forfeited. Forms returned by U.S. mail must be postmarked by the due date or it will not be accepted.

Section 4: Program of Instruction

Athlos Academy of Utah will utilize curriculum that supports the three pillars of *Prepared Mind*, *Healthy Body*, and *Performance Character*.

Educational Plan

Athlos Academy of Utah's academic foundation is based upon The Core Knowledge Sequence (Core Knowledge) developed by E.D. Hirsch and his Core Knowledge Foundation. The Core Knowledge Sequence is defined as "a detailed outline of specific content and skills to be taught in language arts, history, geography, mathematics, science, and the fine arts. As the core of a school's curriculum, it provides a coherent, content specific foundation of learning, while allowing flexibility to meet local needs."¹⁴

The Core Knowledge Sequence is the result of research into the content and structure of the highest performing elementary school systems around the world, as well as extensive consensus building among diverse groups and interests, including parents, teachers, scientists, professional curriculum organizations, and experts from the Core Knowledge Advisory Board on Multicultural Traditions.

The Core Knowledge Sequence is recognized as an effective whole-school model, being one of the 33 whole-school models recognized by the U.S. Education Department as high-quality and determined to be effective through research¹⁵.

Core Knowledge is content specific, coherent, cumulative and content rich. The specificity of the Core Knowledge Sequence distinguishes it from other curricula. By clearly specifying important knowledge in language arts, history, geography, math, science, and the fine arts, the Core Knowledge Sequence presents a practical answer to the question, "What do our children need to know?" While most provide general guidelines concerning skills, they typically offer little help in deciding specific content. The specific content in the Core Knowledge Sequence also provides a solid foundation for skills instruction. Additionally, because the Sequence builds knowledge systematically year by year, it helps prevent repetitions and gaps in instruction that can result from vague curricular guidelines. The Sequence is coherent and cumulative.

To implement Core Knowledge, many people, including staff and parents, engage in a great deal of thoughtful discussion and cooperative planning. The Sequence's high level of specificity grounds communication among staff members and with parents, providing a shared basis for understanding each child's curriculum and instruction. Teachers make a commitment to teach all the topics in the Core Knowledge Sequence at the assigned grade levels, and this commitment ensures consistency and helps avoid serious gaps and needless repetitions.

¹⁴ <http://www.coreknowledge.org/download-the-sequence>.

¹⁵ <http://www2.ed.gov/about/offices/list/ope/fipse/lessons4/uva.html>
www.nwrel.org/scpd/catalog/index.shtml



The Core Knowledge Sequence is implemented horizontally, vertically, and in an interdisciplinary way. For example, for horizontal implementation, every 7th grade teacher in the school teaches the same material at the same time based on an annual curriculum plan. It is vertical because the 6th grade teachers know what was learned in 5th grade and what they must teach in 6th grade to prepare students for 7th. It is also an interdisciplinary curriculum. For example, when students learn about the 1920's in their history class, they are also learning about jazz artists in their music class, perhaps dancing the Charleston in their physical education class, and studying the Scopes Monkey trials in science class and the stock market crash in their math class.

Language Arts Program

Athlos Academy of Utah's language arts curriculum incorporates a sequential, phonic based decoding program that is effective with on-grade, below-grade and advanced learners. Athlos Academy of Utah will incorporate the Spalding Method, a strong research-based instructional program, based on Romalda Spalding's book "The Writing Road to Reading." The Spalding Method is explicit, sequential, multisensory, and diagnostic.

As part of the research base for The Writing Road to Reading, Arizona State University conducted a four-year longitudinal study of the effectiveness of The Writing Road to Reading program. Arizona State University summarized the study as follows:

"According to the year four results, students who used The Writing Road to Reading demonstrate higher and statistically significant learning as measured by DIBELS (Dynamic Indicators of Basic Early Literacy Skills). Since both the control groups and the experimental groups used detailed teacher guides evaluated by Arizona Department of Education for research-based reading components, theoretically, they should have produced similar results. This was not the case. The four-year findings strongly suggest that use of The Writing Road to Reading program is an effective method for enhancing performance on critical early literacy skills."¹⁶

The Spalding Method is based on the concept that students' physical and mental well-being is a primary concern and that all children can learn. The learning objectives are as follows:

- Spelling lesson objectives include phonemic awareness, phonics with handwriting, spelling rules, and writing high-frequency vocabulary words in a notebook
- Writing lesson objectives include meaning and usage of the same high-frequency spelling words, morphology, parts of speech, English conventions, grammar, and compositions.
- Reading lesson objectives include literary appreciation, text fluency, text structure, and listening and reading comprehension strategies.

Core Knowledge Literature

The Core Knowledge literature sequence is rich and engaging, and builds the cultural literacy of students. It includes poetry, sayings and phrases, and classic literature at all grade levels, and dovetails well with the Spalding Method, as the literature can be used as the reading instructional

¹⁶ <http://www.spalding.org/index.php?tname=research>

material. Additionally, the Core Knowledge literature sequence is easily integrated with the history content for each grade level which assists the teacher in developing and implementing thematic instruction strategies.

Junior Great Books

The Junior Great Books program starts in third grade and will be used to engage students in high-quality literature, and to help develop critical thinking skills. Junior Great Book literature is age-appropriate and compliments the Core Knowledge literature selections. The program challenges readers, encourages critical examination and rigorous review, and promotes thoughtful discussion through the process of shared inquiry. The skills developed through the Junior Great Books Program builds students' higher order thinking skills, skills that are applicable in every subject area.

This program has a strong research base. Over one million students participate in Junior Great Book programs in the United States and eight other countries. It also has been identified as a successful, research-based program by the U.S. Education Department¹⁷.

Mathematics Program

Athlos Academy of Utah will use the research-based Saxon Math Program for Kindergarten through eighth grade mathematics instruction. Saxon Math covers grades K-12 and is based on incremental development and continual review of mathematical concepts to give students time to learn and practice concepts throughout the year. The program is built on the premise that students learn best when instruction is incremental and explicit, previously learned concepts are continually reviewed, and assessment is frequent and cumulative. Incremental development is information being taught in small and easily learned pieces. The instructional approach, specifically incremental development, continual review of concepts, and frequent and cumulative testing, embodied in the Saxon Math curriculum is consistent with that used by Core Knowledge. Studies conducted have revealed math performance for students using the Saxon Math program are higher than for students in schools using other types of math curriculum¹⁸.

Athlos Athletic Curriculum

An article by Eloise Elliot, PhD and Steve Sanders, PhD entitled *Children and Physical Activity - The Importance of Movement and Physical Activity* quotes as follows:

"It has often been said, 'children learn through movement.' In addition to the health benefits of physical activity, movement is an integral part of the young child's life and education, for it is

¹⁷ National Diffusion Network. (1994–1996). *Educational programs that work: The catalogue of the National Diffusion Network*. Longmont, CO: Sopris West.

¹⁸ <http://ies.ed.gov/ncee/wwc/publications/quickreviews/QRReport.aspx?QRID=117>

http://ies.ed.gov/ncee/wwc/reports/middle_math/topic/index.asp

Perlstein, L. (2007), *Tested: One American School Struggles to Make the Grade* New York: Henry Holt and Company



through movement that children develop social, emotional, and cognitive skills. For young children, movement is a critical means of communication, expression, and learning¹⁹.”

An achievement is gained by a partnership made up of knowledge and the development of intangible character qualities such as endurance, grit, commitment and focus. These character qualities are what Paul Tough author of *How Children Succeed*²⁰ calls *Performance Character*. *Performance Character* refers to the cognitive, emotional, and behavioral dispositions needed to achieve human excellence in performance environments—in school, extracurricular activities, and work. *Performance Character* is built on “willing values” such as perseverance, diligence, and self-discipline. As children learn through the modality of movement, one of the best ways to develop *Performance Character* is through a comprehensive athletic curriculum. Athletics is a powerful tool and if used properly, teaches a child about delayed gratification, great successes, and great failures – all of which are a natural part of life. The great debate in the educational world is over this question - what is needed educationally to provide children with what they need to become a success in the world? A good academic program dealing with the mind is certainly important, but is that all it takes? The mind, body and character are all naturally interconnected in a human being.

While many schools seek to provide physical education, it is not an exaggeration to say that physical education is viewed merely as an extracurricular activity that can be cut when the school budget gets tight. *The New York Times* reported in July 2012²¹ that many schools across the nation have little or no physical education time for students despite the fact that childhood obesity is recognized as a national problem.

The Athlos Athletic Curriculum develops discipline, work ethic, integrity, leadership, teamwork and character through physical fitness and athleticism. It is Athlos Academy of Utah view that “athleticism” can be taught and athletic achievement is attainable for all students. This is all done in an age appropriate manner. By building a lifelong foundation of physical health and skills, children build positive self-image, increase confidence and energy, and improve their mental toughness and the ability to overcome adversity.

The Athlos Athletic Curriculum combines conventional physical educational standards with current scientific sports performance methodology. Athlos Academy of Utah facilitates an educational environment that highlights the strengths of physical education teachers, while also incorporating the expertise of degreed and certified sports performance coaches. Athlos Academy of Utah believes this integration of fitness professionals provides an unparalleled physical education experience for students.

The Athlos Athletic Curriculum goes far beyond fundamental movement skills such as running, jumping, throwing, and catching by simultaneously infusing scientific principles that improve

¹⁹ <http://www.pbs.org/teachers/earlychildhood/articles/physical.html>

²⁰ <http://www.edsource.org/today/2012/the-grit-factor-hard-to-measure-hard-to-succeed-without/20844>

²¹ http://www.nytimes.com/2012/07/11/education/even-as-schools-battle-obesity-physical-education-is-sidelined.html?pagewanted=all&_r=0



athletic performance measures such as speed, agility, quickness, flexibility and strength. The rationale for the development of athletic ability is rooted in proper exercise selection, exercise sequence, and exercise progressions that derive from the definable methodology of Velocity Sports Performance. The intent of the curriculum is to progress student athletes' week-to-week, quarter-to-quarter in order to establish a true training progression throughout the student athlete's tenure at Athlos Academy of Utah.

Athlos Academies, the Education Service Provider selected to implement the program at Athlos Academy of Utah, partnered with a third-party sports performance provider, Velocity Sports Performance, to develop the Athlos Athletic Curriculum that is tailored to students spanning each grade level for 30-45 minutes a day²² depending on grade level. This curriculum emphasizes balance, coordination, technique, relative strength and the introduction of essential muscular movement patterns, all of which are vital to establishing an athletic foundation, injury prevention and a long-term enjoyment of physical activity and exercise. The Athlos Athletic Curriculum will introduce and create foundations of overall athleticism for students in a fun, positive, and high-success environment.

Beginning in Kindergarten, all students will have purposeful opportunities to learn how to build strength, practice good nutrition and get exercise. These skills will eventually become habits of mind. Athlos Academy of Utah healthy school emphasis will be supported by the school lunch program, which is based upon nutrient-rich, fresh foods. Nutritional guidance and instruction will also be provided to the students as part of the Science and Health curriculum.

The curriculum is focused and purposeful. Athletic achievement is attainable for everyone and athleticism can be taught. Instead of unfocused physical education time, students will be participating in specific exercises geared not solely to overall fitness, but also to increased athletic skill. For example, instead of merely instructing children to run around the gym, they will be taught *how* to run. Athlos Academy of Utah students will receive training in strength and agility. The performance skills gained benefit all children regardless of whether or not a child becomes an athlete in the traditional sense. Each child's progress will be tracked using Athlos Academy of Utah produced tools; allowing the children to see growth in themselves and in others. The purpose of this exercise is not to show who is athletic and who is not, but rather an opportunity to teach *Performance Character*.

The curriculum will be administered as follows:

Physical Education Teacher Responsibility: The physical education teacher's responsibilities include curriculum mapping in accordance with Utah State Core Standards in conjunction with the Athlos Athletic Curriculum, teaching and assessing objectives, classroom management, and communicating with parents. He/she works closely with the sports performance coach in gaining the scientific knowledge of sports performance as it relates to principles of exercise science, biomechanics, anatomy, physiology, thermogenics, etc. He/she is responsible for grading as well as any interaction with the children's parents. It will be the physical education teacher's

²² Fitness is typically provided four days a week. It may vary based on grade levels and the master school schedule.



responsibility to incorporate the identified objectives of the movement (acceleration, multi-direction, and max velocity) during team sport activities.

Sports Performance Coach Responsibility: In partnership with the physical education teacher, the performance coach's primary responsibility is quality control as it relates to the methodology of the Athlos Athletic Curriculum. He/she serves as content experts for the instruction of acceleration, multi-direction (agility), maximum-velocity, and strength training progressions. It is his/her responsibility to educate the students regarding any subject matter relating to sports performance. He/she focuses on continually furthering their knowledge surrounding the methodology incorporated into the curriculum and properly assesses each student's improvement in performance throughout the year. He/she is responsible for effectively utilizing cues (direction) and techniques to improve each student's performance. They work closely with the physical education teacher in order to deliver a well-rounded state of the art curriculum. The sports performance coach serves as the technical eye in the training space to ensure the greatest potential of success for each student.

Athlos Coaching Philosophy: It is important for Athlos Academy of Utah educators to realize and embrace the art of effective coaching. The vision of the Athlos Academies model is to foster an environment where the educational background of the physical education teacher and the coaching expertise and exercise science knowledge of the sports performance coach meet. This combination of expertise will provide the greatest opportunity for students to learn how to move and become more athletic. During the delivery of the Athlos Athletic Curriculum, the physical education teacher and the sports performance coach should implement the principals of education as well as motivation. The Athlos Athletic Curriculum is designed to maximize every minute of class and it will take proper planning and an effective partnership between the velocity coach and the physical education teacher to do so. The aim of the curriculum is to create fit and skilled students. That being said, it is important teachers and coaches represent this inspiration by creating a fitness environment that is first led by example. The physical education team assembled at Athlos Academy of Utah will be intent on fostering an environment where the athletic goals of students can be achieved and the enjoyment of physical activity is demonstrated, encouraged, and rewarded.

The notion of utilizing athletics as a means of developing character is not a new concept. Character in Sports.net²³ provides a program for traditional athletic programs called CARES (Character, Attitude, Respect, Effort and Success); they quote as follows:

"There are many opportunities to teach life lessons to student-athletes through athletics. When approached in the appropriate fashion, the peaks and valleys of athletics can help prepare student-athletes for real life. Opportunities may arise throughout the course of an athletic season or career such as: the ability to deal with adversity, to work with others towards a common goal, to overcome obstacles, to fail, to be defeated, and to win. All of these athletic situations help student-athletes deal with future real-life situations that require strength, courage, hard work,

²³ <http://www.characterinsports.net/content/>

mental toughness, and/or humility. These educational opportunities can either be harnessed and cultivated or ignored and wasted. Athletics are meant to help develop the whole person – the body in conjunction with the mind."

Grit: Angela Duckworth and Christopher Peterson in *Grit: Perseverance and Passion for Long Term Goals*, 2007, asked the question "why do some individuals accomplish more than others of equal intelligence?" They labeled this character trait as "grit". The authors developed a Grit Scorecard and conducted six field research studies to test their hypothesis. One such study included assessing 1,152 cadets at West Point prior to a rigorous summer training program to predict who would complete the program. Cadets higher in grit score were more likely to complete the training. Another study of undergraduates at an elite university revealed that those who scored higher in grit also earned higher GPAs than their peers, despite having lower SAT scores.

Duckworth and Peterson concluded from the studies that "a gritty individual approaches achievement as a marathon; the advantage is stamina". Other observations were that grit increases with age; more educated adults were higher in grit than less educated adults of equal age; and parents and educators should prepare youth to anticipate failures and misfortunes and should point out that excellence in any discipline requires years and years of time on task. Achievement involves both intensity and stamina. The athletic venue provides a place to develop grit, especially for students who may not have the natural ability to succeed in the traditional classroom setting. *Performance Character* traits Athlos Academy of Utah focuses on within Grit are focus, optimism, and curiosity.

Social Intelligence: Social intelligence is the capacity to effectively navigate and negotiate complex social relationships and environments. This skill is best learned in a group setting such as athletics. An article in *Psychology Today* by Christopher Bergland states: "To navigate complex social environments a person has to learn to read cues from body language, tone of voice, and eye contact - all needed to learn to predict what someone might say or do next. Before social media revolution athletics was just one component of a much enriched social environment. Today, it may be one of the few times during the day when practicing the art of competition and camaraderie can be fine-tuned. You can take the lessons you learn about being both a competitor and comrade on the playing field back to your real life. This is one reason that it is critical for us as a society to continue funding and supporting athletic programs in schools. Both individual and team sports can flex your brain's ability as a social creature. You learn to be competitive and compassionate at the same time through sports. This is one reason that in a digital age it is more important than ever that young people are encouraged to participate in athletics. Team sports force human interaction by their nature²⁴." Within social intelligence, *Performance Character* traits emphasized are humility, Integrity, and Creativity.

Leadership: Every student needs leadership skills. Leadership is much more inclusive than simply being in charge of others. It is the ability to analyze a situation, determine needs, and implement

²⁴ <http://www.psychologytoday.com/blog/the-athletes-way/201205/cooperation-and-teamwork-build-intelligence>



solutions. The *Performance Character* traits emphasized under the Leadership umbrella are energy/zest, courage, and initiative; all key components in motivating self and others.

Research Supporting the Athlos Athletic Curriculum

Foundational Research: Research compiled by Stewart G. Trost, PhD, Associate Professor, Department of Nutrition and Exercise Sciences at Oregon State University and Active Living Research, a national program of the Robert Wood Johnson Foundation, verifies that physical education, physical activity and academic performance are all connected. Their research found that “fourteen published studies analyzing data from approximately 58,000 students between 1967 and 2006 have investigated the link between overall participation in physical activity and academic performance. Eleven of those studies found that regular participation in physical activity is associated with improved academic performance.” Specifically, their research found that “activity breaks can improve cognitive performance and classroom behavior. According to five studies involving elementary students, regular physical activity breaks during the school day may enhance academic performance. Introducing physical activity has been shown to improve cognitive performance and promote on-task classroom behavior.”²⁵

Centers For Disease Control: Research conducted by the Centers for Disease Control and Prevention entitled *The Association Between School-Based Physical Activity, Including Physical Education, and Academic Performance*, July 2010, found that “there is substantial evidence that physical activity can help improve academic achievement, including grades and standardized test scores” and “Nine studies (reported in nine articles) explored physical activity that occurred in classrooms apart from physical education classes and recess. In general, these studies explored short physical activity breaks (5–20 minutes) or ways to introduce physical activity into learning activities that were either designed to promote learning through physical activity or provide students with a pure physical activity break. These studies examined how the introduction of brief physical activities in a classroom setting affected cognitive skills (aptitude, attention, memory) and attitudes (mood); academic behaviors (on-task behavior, concentration); and academic achievement (standardized test scores, reading literacy scores, or math fluency scores). Eight of the nine studies found positive associations between classroom-based physical activity and indicators of cognitive skills and attitudes, academic behavior, and academic achievement; none of the studies found negative associations.”

State Level Educational Research: The California Department of Education prepared a report in April 2005 entitled *A Study of the Relationship between Physical Fitness and Academic Achievement in California Using 2004 Test Results*. The study involved students in grades 5-9 and compared the results of their physical fitness test scores to their scores in English and Geometry. The results were as follows.

²⁵ www.activelivingresearch.org/files/Active_Ed.pdf



Results

Figure 1 shows the mean scale scores on the 2004 CST in English-language arts by the number of fitness standards achieved (i.e., the overall PFT score).

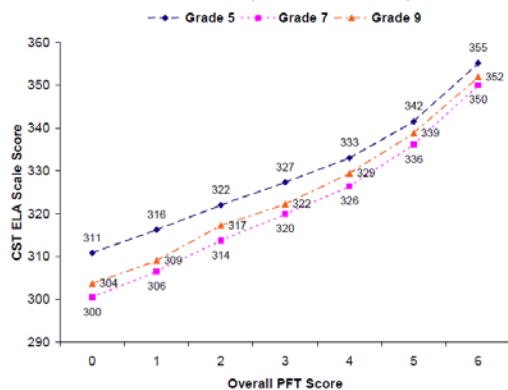


Figure 1. 2004 CST in English-language arts mean scale scores for grades 5, 7, and 9 by overall PFT scores. In grade 5 there were 371,198 students, grade 7 had 366,278 students, and grade 9 had 298,910 students.

As the overall Physical Fitness Test (PFT) score improved, the mean scale score on the California Standards Test (CST) in English-language arts also improved. The average scale score on the CST in English-language arts for fifth-grade students who did not achieve any of the fitness standards was 311. The same scale score for seventh and ninth graders was 300 and 304, respectively. The average scale score on the CST in English-language arts for fifth-grade students who achieved all six fitness standards was 355. The same scale score for 7th and 9th graders was 350 and 352, respectively. The change in average scale scores on the CST in English-language arts from those who achieved none of the

fitness standards to those who achieved all six was around 50 points. Results indicate a positive relationship between academic achievement and physical fitness. As one measure improved, so did the other.

Mathematics results were consistent with English-language arts results. That is, as the overall PFT score improved, the mean scale score on the CST in mathematics also improved. Results indicate that even when the measure of academic achievement changed, a positive relationship between academic achievement and physical fitness remained.

Figure 2 shows these same results using 2004 CST in mathematics scale scores.

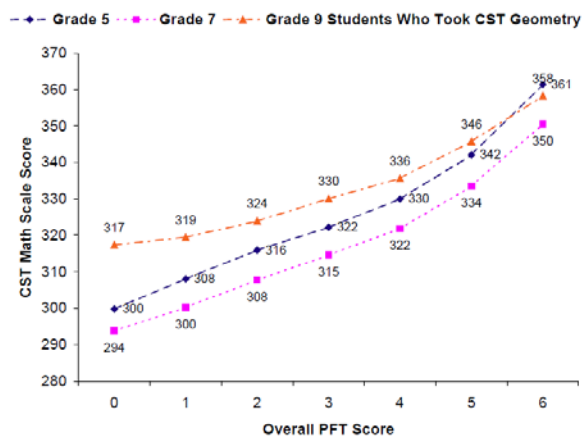


Figure 2. 2004 CST in mathematics mean scale scores by overall PFT scores for grades 5, 7, and 9. The numbers of students in grades 5 and 7 were the same as those in Figure 1. The number of grade 9 geometry students was 63,028.

Performance Character

Athlos Academy of Utah teaches the twelve *Performance Character* traits throughout the entire curriculum, incorporating the use of videos, examples from literature the students are reading, activities within the Athlos Athletic Curriculum, and “chalk talk”, where students analyze situations both on and off the field to identify, implement, and strengthen *Performance Character*. Growth of *Performance Character* is determined collaboratively by the classroom teacher, the turf coach, parents, and students. For each trait, students are required to fill out a “Student Launch Report” (illustrated below), and then try to exemplify it in their lives. The Athlos Academy of Utah community focuses on each of the three main domains—grit, leadership, and social intelligence—for three months each, emphasizing one of the three main traits within the umbrella for one month at a time. The scores from each of the four stakeholders are averaged to create an overall score for each *Performance Character* trait, creating the *Performance Character* Report Card (also illustrated below).

Student Launch Report



Courage

Student seeks to accomplish new goals or challenges and shows willingness to take risks, even if failure may be the initial outcome. Demonstrates ability to stand up for what he/she thinks is right, even if it's not favored.

Student Goal For Developing Courage

Write a specific goal for developing more Courage in your life during this module of study:

Evaluate Your Goal

Evaluate how you did in accomplishing your Courage goal for this module. Be specific about your effort.

Character Huddle on Courage

Explain what was most impactful for you during the Character Huddles on Courage and why?

Athlos Report Card



Athlos Cumulative Grade

Combined average of all performance character trait grades

3.64

Student Name: Aaron Evans

Grade Level: 5

Homeroom Teacher: Merritt

Grit	Focus / Self Control	Optimism	Curiosity
3.7	2.3	4.3	4.7

Leadership	Energy / Zest	Courage	Initiative
3.7	4.7	4.3	3.7

Social Intelligence	Humility	Integrity	Creativity
4	2	2.3	4

Comments:

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____

Parents: The Athlos Score is provided to encourage conversation between you and your student. Performance Character Trait scoring is subjective and is intended to give you an opportunity to see your student focus on improving and to encourage conversation between you and your student on what traits they excel at and what traits may need improvement. The Athlos Score is not provided for comparative value against other students. Continued improvement is the goal of Athlos Performance Character Traits.



<https://tools.athlosacademies.org>

Methods of Instruction and Delivery

Athlos Academy of Utah uses a combination of direct instruction and hands on learning to effectively teach students. Both have benefits, and are used as outlined below.

Student learning is optimized when instruction is systematic, explicit, and efficient. **Direct instruction** is a teaching methodology that ensures teaching meets all three of these criteria. Spalding, Core Knowledge, and Saxon all utilize direct instruction, which has been shown to be effective in a number of studies²⁶. Direct instruction has proven to be particularly beneficial in teaching basic skills in the early grades and for students of lower socioeconomic status, English Language Learners, and students requiring special education services. Direct instruction at Athlos Academy of Utah will be the primary mode of instruction in grades kindergarten through third, with some project based (hands on) learning occurring primarily in science.

Project based (hands on learning) provides students with hands-on activities to learn a concept and apply it in a relevant and real-life situation. This approach works well with the Core Knowledge Sequence, as students have a wealth of topics in which to explore. Because the same topic is taught across the curriculum, students have ample time and are provided with insight from different domains to develop mastery of a concept as well as understand why it is important and in what realms it can be applied. Beginning in fourth grade, project based learning activities

²⁶ <http://www.jstor.org/discover/10.2307/747654?uid=3739256&uid=2&uid=4&sid=21104337566893>
<http://onlinelibrary.wiley.com/doi/10.1111/j.1937-8327.1990.tb00478.x/abstract>
<http://eric.ed.gov/?id=EJ338723>



become a more common in instruction, increasing as students' progress through the higher grades at Athlos Academy of Utah. Research has demonstrated project based learning to be an effective mode of teaching for all learners, as summarized in an article by John W. Thomas.²⁷

The combination of direct instruction and project based learning strategies allows accelerated students to progress at a more advanced level and provides opportunity for students who are struggling additional time to master concepts and skills. This will usually occur through differentiated instruction within projects.

The Board of Directors holds the School Director responsible for ensuring all curriculums is adhered to and monitor student progress toward content mastery. The Director will be required to present academic progress to the Board of Directors on a quarterly basis, along with any interventions, resources, or curricular changes needed.

Assessment

Athlos Academy of Utah is a data-driven institution. Students attending the school will be assessed in each of the core academic skill areas by a range of valid and reliable methods, including summative and formative assessments. Athlos Academy of Utah will participate in and comply with all mandated testing, and will set goals for the school which are in line with the Authorizer's Charter School Performance Standards.

Based on the assessment of progress, the student, their family and the school may make any number of changes to address identified needs and/or allow the student to progress farther and/or faster.

In order to best serve the students and community, Athlos Academy of Utah will continually examine and refine the list of student outcomes over time to reflect the school's mission and changes to state standards that support Athlos Academy of Utah's mission.

Measurable Student Outcomes

Athlos Academy of Utah will implement a system of frequent formative assessments in order to benchmark the progress students make during the school year toward meeting year-end goals. By using baseline data to set measurable year-end goals while also implementing a system that allows for frequent analysis and adjustment of instructional and organizational practice, a plan is in place to ensure that each student is provided with an academic program to support him/her in performing at or above grade level by the end of each school year. The following assessments will be used internally on an on-going basis to measure growth and achievement:

- DIBELS for reading fluency and comprehension (through grade 6)
- Saxon Benchmark tests for math

²⁷ http://scholar.google.com/scholar_url?hl=en&q=http://w.newtechnetwork.org/sites/default/files/news/pbl_research2.pdf&sa=X&scisig=AAGBfm0Zrm6Y2nPLxnxSUGtnCiK k IPVg&oi=scholar



- Spalding Benchmark tests in spelling
- Pre and Post Assessments for Core Knowledge units

Each of these assessments can be utilized over multiple years, allowing Athlos Academy of Utah to track growth longitudinally. Administration will use the data to determine professional development needs and additional curricular or instructional support.

Teachers draw upon current professional development as they prepare lessons, deliver instruction, and assess. Upon evaluation, teachers and administration become aware of areas needing remediation or reinforcement or if a student needs additional rigor. Professional development activities and presentations will be planned and presented according to school needs.

Athlos Academy of Utah will remain accountable to high standards and high performance through:

- Assessment reports presented at board meetings
- Proficiency reporting in the yearly annual report
- Regular communication with families regarding assessment data

Teachers will meet in professional learning communities (PLC) on a regular basis, as determined by the school principal and will review student progress using curriculum assessments and standardized testing. They will look for trends that may indicate areas the majority of students need additional instruction in, a needed change in how a concept is taught, and/or curricular adaptations. Teachers will also look at the performance of individual students to identify those needing additional support. When a student is identified as struggling with content mastery, the team will put interventions in place (RtI) to support and facilitate learning.

School Design

Athlos Academy of Utah will contract with Athlos Academies for program management services. The contract will detail specific services, including but not limited to items such as professional development, curriculum resources, daily operations assistance, school launch support, marketing and recruitment, and policy development. Currently, there are seven schools in three states with an additional five scheduled to open in 2015, and the program is in high demand in the communities where schools are located. The mission and vision of the school, along with the three pillars of *Prepared Mind*, *Health Body*, and *Performance Character* resonates with the Athlos Academy of Utah Board of Directors as well. Athlos Academies has the financial capital to acquire land, build the necessary facility, and an economy of scale to handle legal, human resource, business management and other school needs. The curriculum is already completely developed and Athlos Academies provides program implementation support through a series of regular site visits, observations, evaluations, and conferences with the school's administrative team and Board of Directors.



The Athlos Academies curriculum is still new, and academic results are just being compiled, but the research behind the program is valid and reliable, as previously cited. The Athlos Academy of Utah of Utah Board of Directors believes the strong demand for the school in areas where the model is operating shows that parents find value in the model and their students are achieving success. Athlos Academies is certain higher academic achievement will be reflected as a result of the combined focus on academics, athletics, and character development.

The table in Section 3: Student Population illustrates the strong demand for the Athlos Academies model in areas where the school model is being implemented.

Replicating the Athlos Model

Because Athlos Academy of Utah will be contracting with Athlos Academies to provide the school's administrative personnel as well as services in support of the daily operations and management of the school, a high level of fidelity to the program is ensured, as well as the capacity to replicate the design. While the school's lead administrator, assistant administrator, and business manager will report directly to the ESP, the Board of Directors of Athlos Academy will hold the ESP accountable for providing services through contracts. The Board of Directors will participate in the annual evaluation process for administrative positions.

Successful practices of implementing the selected academic curriculum with the *Performance Character* curriculum and Athlos Athletic Curriculum have been elaborated on earlier in this section. Because the model in its fully managed form is still new, three years of accumulated data is not available. However, the Board of Directors believes the early results are promising and the research behind the model is valid and reliable. The following is a synopsis of performance to date.

School Performance Data

Legacy Traditional School in Queen Creek, AZ was among the first schools to adopt the Athlos model in 2010, upon opening the school. The school's test scores have since risen steadily. The school achieved 90% overall proficiency in reading in 2011 on the AIMS exams; this score has risen to 93% in 2014. Similarly, the school achieved 77% in math in 2011 on the AIMS exams; this score has risen to 83% proficiency in 2014. The school continually scores above state averages in Reading, Writing, Math, and Science.

Because of the success at Queen Creek, the Legacy Charter Schools have since adopted the Athlos Model in two additional schools, located in Gilbert and Chandler. All three schools implementing the Athlos model received a grade of "A" from the Arizona Department of Education in 2014.

Athlos Academies School Model Adoption

The Athlos Academies school model is still within five years of its development. As such, long-term data is simply unavailable. However, the program was developed based on sound research that supports the design of the three and utilizes well-proven academic programs that do have



long-term data speaking to their success. These programs include Core Knowledge, Spaulding, and Saxon.

Athlos School Adoption Dates

Legacy Traditional – Queen Creek – July 2010

Athlos Chandler – July 2011

Legacy Traditional – Gilbert - August 2013

ILT – Garland K-8 – July 2013

ILT - Garland HS – July 2013

ILT – Arlington K-8 – July 2013

ILT – Arlington HS – 2013

ILT – Fort Worth – August 2014

Athlos Leadership Academy – Brownsville – August 2014

Athlos Leadership Academy – San Antonio – August 2014

Athlos Leadership Academy – Austin – August 2014

Athlos Leadership Academy – Brooklyn Park – September 2014

Parental Involvement

Parental involvement is a key factor in the success of any charter school. Athlos Academy of Utah will allocate significant effort toward developing a sustainable system of volunteer management and community involvement to ensure high levels of parental involvement are maintained. Some of the strategies to be utilized include parent/student/teacher conferences, open houses, email and phone communication, parent and student surveys, parent participation on committees, and parent participation on the Board of Directors.

Additionally, parents are asked to evaluate their children according to the *Performance Character* rubric used by both student and teacher to help encourage re-enforcement of the twelve *Performance Character* traits at home as well as at school. Parents will also have ample opportunities to volunteer at the school, including involvement with the PTO.

The Founders of Athlos Academy of Utah recognize the powerful impact that committed parents have as recruitment ambassadors, and will work closely with them to organize efforts to generate interest and commitment from other parents. Strong parental involvement will always be a key determinant in the school's ability to maintain full enrollment.

Discipline

The three pillars of the Athlos Academies model require a school culture of respect—respect for one's self, respect for the rights and opinions of others, and respect for staff. School administration and staff will strive to foster such a culture through example, reinforcement of positive behavior, and remediation when necessary. Students need to feel safe—physically, intellectually, and emotionally—in order to have the fullest and most meaningful education.



School administration, faculty, and staff will be required to be vigilant in creating a safe and positive culture.

When a student violates a school rule, he/she will be required to use Socratic-type questions to analyze behavior, determine how to make and carry out restitution, and determine how he/she will prevent such behavior in the future. Minor infractions should be handled in the classroom by the teacher; repeat offenses will initiate a conference between the parent, student, teacher(s), and possibly school administration. Major infractions will be handled by the school administration, following the approved disciplinary policies.

Athlos Academy of Utah will comply with all laws and regulations relating to student discipline, currently found in Section 9 of UCA 53A-11. The school's policy for discipline, suspension, and expulsion is as follows.

I. Purpose

The purpose of the policy is to foster a safe, positive environment for learning by teaching the practice of self-discipline, citizenship skills, and social skills.

II. Teaching self-discipline, citizenship and social skills

In every area of education if students lack skills taught at the school. Athlos Academy of Utah believes the same should be true for student behavior, including self-discipline, citizenship skills, and social skills. The school will provide supports to students and the community at large by expressly teaching students these skills.

A. Plans and policies shall be developed for classroom and student management which will include:

- Written standards for behavior expectations, including school and classroom management
- Effective instructional practices for teaching student expectations, including self-discipline, citizenship, civic skills, and social skills
- Systematic methods for reinforcement of expected behaviors
- Uniform methods for correction of student behaviors
- Uniform methods for school -level data-base evaluations of efficiency and effectiveness

B. On-going staff development shall be provided for all staff regarding:

- Effective instructional practices for teaching and reinforcing behavior expectations
- Effective intervention strategies
- Effective strategies for evaluation of the efficiency and effectiveness of interventions

C. Athlos Academy of Utah personnel shall determine the range of student behaviors and establish a continuum of administrative procedures that may be used by school personnel to address student behavior, including classroom and building level strategies.



III. Range of Behaviors and Continuum of Procedures

Athlos Academy of Utah personnel shall determine by consensus student behavior infractions that should be dealt with at the classroom level and building level.

A. Minor infractions are defined as infraction of school rules that are usually handled by teachers in the classroom. Chronic or excessive minor infractions can become major infractions and result in office discipline referral to school administration. Minor infractions can result in a loss of privileges, phone calls home, and in-school suspension. The following are minor infractions:

- Dress code violations
- Disrespect, including put downs, talking back, and defiance
- Public displays of affection
- Inappropriate language and actions
- Tardies
- Disruptive behavior including talk-outs, chronic talking, and out of seat
- Horseplay
- Bus misconduct
- Noncompliance

B. Major infractions are defined as severe infractions of school rules that result in immediate office discipline referrals to school administration and usually lead to out of school suspension. Major infractions include:

- Safe school violations, including assault, threats to kill/harm, discrimination
- Drug, alcohol, and tobacco violations
- Physical aggression including fighting and throwing objects at a person
- Any criminal action occurring at school such as vandalism, fire setting, possession or use of combustibles, forgery, and theft
- Chronic or excessive abusive language, truancy, tardies, or non-compliance
- Bullying and harassment

C. The Building Administrator shall be authorized to issue notices of disruptive behavior. These personnel shall provide documentation of habitually disruptive student behavior prior to court referral.

IV. Training

Athlos Academy of Utah will provide training and strategies for students and staff in the following:

- Overt aggression
- Relational aggression
- Cyber bullying

- Intervention skills
- Social skills
- Adult supervision of students
- Provide for student assessment of the prevalence of bullying in school

V. Prohibited Conduct and Related Discipline

Prohibited conduct is forbidden at school, on school property, including school vehicles, and at any school activity. A serious violation that threatens or harms a school, school property, a person connected with school, or property associated with a person connected with school is forbidden regardless of where it occurs.

A. A student WILL be removed from school for at least one year for a serious violation involving the following:

- A real weapon or
- Explosive or flammable material or
- Actual or threatened use of a look-alike weapon with intent to intimidate or cause disruption.
- Exceptions may be made on a case by case basis through the Board of Directors.

B. A student WILL be removed from school for the following:

Possession, control, actual or threatened use of a real weapon, explosive, noxious, or flammable material;

- Actual or threatened use of a look-alike weapon with intent to intimidate or cause disruption;
- The sale, control or distribution of a drug, controlled substance, imitation controlled substance, or drug paraphernalia;
- Using or threatening to use serious force;
- The commission of an act involving the use of force or the threatened use of force which if committed by an adult would be a felony or class A misdemeanor; or
- A serious violation of Section II.C affecting a student or staff member.

C. A student MAY be removed from school for the following:

- Willful disobedience or violating a school rule;
- Defying authority;
- Disruptive behavior;
- Foul, profane, vulgar, or abusive language;
- Defacing or destroying school property;
- Truancy;
- Theft;
- Posing a significant threat to the welfare, safety or morals of a student, school personnel, or the operation of the school;
- Fighting;



- Bullying (including, but not limited to, behavior intended to cause harm or distress in a relationship with an imbalance of power, especially if repeated over time);
- Possessing, using, controlling, or being under the influence of alcohol, a drug, an imitation drug, drug paraphernalia, or misusing any substance;
- Possessing or using tobacco;
- Hazing, demeaning, or assaulting someone, or forcing someone to ingest a substance;
- Inappropriate exposure of body parts;
- Sexual or other harassment; or
- Gang-related attire or activity.

The decision to remove or to discipline in some other way is made by the Director based on all the circumstances.

D. The type and length of discipline is based on factors such as previous violations, severity of conduct, and other relevant educational concerns.

E. When appropriate, students will be placed on remedial discipline plans.

F. School personnel may use reasonable physical restraint, if necessary, to protect a person or property from physical injury or to remove a violent or disruptive student.

G. If damage or loss of school property occurs, official report cards, diploma, and transcripts may be withheld until payment for the damage is received or the lost property is recovered.

VI. Habitual Disruptive Behavior

Definitions

Qualifying minor means a school-age minor who is at least nine years old or turns nine years old at any time during the school year.

Disruptive behavior means behavior outlined in Sections III. A, B and C above.

B. Notice of Disruptive Student Behavior

- A Notice of Disruptive Student Behavior may only be issued to a qualifying minor.
- A Notice of Disruptive Student Behavior may only be issued by a school administrator or a designee.
- A Notice of Disruptive Student Behavior shall be issued when the student has:
- engaged in disruptive behavior (that does not result in suspension or expulsion) 3 times during the school year; or
- Engaged in disruptive behavior that results in suspension or expulsion once during the school year.
- A Notice of Disruptive Behavior requires that the student and parent meet with school authorities to discuss the disruptive behavior.

The student and/or parent may contest a Notice of Disruptive Student Behavior in the following manner:

- If the notice is written by an assistant administrator or other designee, the appeal is made to the Director;



- If the notice is written by the principal, the appeal is made to the Board of Directors.
- A school representative shall provide to the student's parent a list of resources available to assist the parent in resolving the student's behavior.
- The school shall establish procedures for the school counselor or other designated school representative to work with a student in order to attempt to resolve the student's behavior problem before the student becomes subject to the jurisdiction of the Juvenile Court.

C. Habitual Disruptive Student Behavior Citation

The Habitual Disruptive Student Behavior Citation may only be issued to a student who has received a Notice of Disruptive Student Behavior and:

- Engages in disruptive behavior (that does not result in suspension or expulsion) at least six times during the school year;
- Engages in disruptive behavior that does not result in suspension or expulsion at least three times during the school year and engages in disruptive behavior that results in suspension or expulsion, at least once during the school year; or
- Engages in disruptive behavior that results in suspension or expulsion, at least twice during the school year.

A Habitual Disruptive Student Behavior Citation may only be issued by the school Director.

- The citation shall be mailed by certified mail to, or served on, the parent of the student.
- A student to whom a Habitual Disruptive Student Behavior Citation is issued shall be referred to the Juvenile Court.
- Within five days after the citation is issued, a representative of Athlos Academy of Utah shall provide documentation to the parent and the court of the efforts made by a school counselor or representative.

The Director will cooperate with the Juvenile Court in providing other information as needed, including but not limited to attendance, grades, and behavioral reports.

VI. Searches

School personnel may search students, lockers, personal property, and vehicles parked on school property based on reasonable suspicion.

School personnel may also conduct random searches that might include all lockers and other school property.

VII. Suspension and Expulsion Defined

Suspension is disciplinary removal from school with an offer of educational services.

Expulsion is a disciplinary removal from school by the Board of Directors for more than ten school days without an offer of alternative educational service.

VIII. Readmission and Admission

If a student is removed from school under III.A, readmission depends upon satisfactory evidence that the student will not be a danger to self, others, or school property. If a student is removed from school under III.B or C, the student may be readmitted after the parent/guardian meets with school officials to make a plan to correct the behavior(s) and after the student completes both the days of suspension and any conditions imposed. Athlos Academy of Utah may deny admission to a student who has been expelled from any school in the last twelve months.

IX. Due Process

If a student is removed from school or otherwise disciplined under this policy, the student has the right to meet with the site administrator to tell his/her side of the story. If the Director recommends removal for more than ten school days, a committee composed of the Board of Directors will hear the case at the school with the student, the parent or guardian, the Director, and others as necessary. This hearing will be held within ten school days of removal from school. If a student is removed from school for more than ten school days, an appeal of the decision may be made in writing to the Board of Directors within ten school days of the decision. The parent or guardian is responsible to plan and to pay for any educational services not provided by the school during the suspension.

X. Students with Disabilities

If a student has a qualified disability, the Director will explain the separate procedures that may apply based on the procedural safeguards under the Individuals with Disabilities Education Act (IDEA) or Section 504 of the Rehabilitation Act.

Assurances

Career Education: We do not intend to offer career education.

Distance or Online Education: We do not intend to offer distance and/or online education.

Gifted Education: We do not intend to offer gifted education.

Four-Year College and/or University Affiliation: We do not intend to partner with a four-year college or university or offer early college options.

Section 5: Performance Measures

Athlos Academy of Utah is a data-driven institution. Students attending the school will be assessed in each of the core academic skill areas by a range of valid and reliable methods, including summative and formative assessments. Athlos Academy of Utah will participate in and comply with all mandated testing with a goal of performing at or above state level in all categories. All goals and performance measures will be in compliance with the State Charter School Performance Framework.

Based on the assessment of progress, the student, his or her family and the school may make any number of changes to address identified needs to allow the student to progress farther and/or faster.

In order to best serve students and the community, Athlos Academy of Utah will continually examine and refine the list of student outcomes over time to reflect the school's mission and changes to state standards that support the school mission.

Proficiency

Athlos Academy of Utah will implement a system of frequent formative assessments in order to benchmark the progress students make during the school year toward meeting year-end goals. By using baseline data to set measurable year-end goals while also implementing a system that allows for frequent analysis and adjustment of instructional and organizational practice, a plan is in place to ensure that each student is provided with an academic program to support his performance at or above grade level by the end of each school year.

Pre and Post exams developed by the Core Knowledge Foundation will be used as a series of benchmark exams throughout the school year, particularly in science and social studies. Beginning, Middle, and End of Year data from state mandated DIBELS testing in conjunction with Spalding Language Arts benchmark assessments will help determine proficiency in Language Arts, and Saxon math benchmark tests will gauge math proficiency. These results can help teachers making instructional decisions throughout the school year. Additionally, high quality, externally developed benchmark exams that align with the school's math and language arts program will also provide ongoing data for teachers. These assessments can be utilized over multiple years, allowing Athlos Academy of Utah to track growth longitudinally. An assessment such as the Iowa Basic Skills Test may be selected by the school to fulfill this requirement.

Teachers draw upon current professional development as they prepare lessons, deliver instruction, and assess student performance. As student data is evaluated by administrative data teams and by teachers working in Professional Learning Communities (PLCs), teachers and administration become aware of areas needing remediation or reinforcement or if a student needs additional rigor. Professional development activities and presentations will be planned and presented according to school needs.



Promotion and Retention

Promotion: A student satisfactorily completing each grade's work will be promoted to the next grade.

Retention: Any decision concerning promotion vs. non-promotion will be made after considering all facts related to a child's development (emotional, physical, and social, as well as intellectual and academic), collected from a wide range of sources throughout the year. Athlos Academy of Utah will make every effort not to displace a student who is being retained, but will be on a space available basis.

Athlos Academy of Utah views retention as an extreme measure and will use it only when a student is so far below grade level that promotion would be detrimental to their educational progress. Students with special education needs will not be retained unless it is determined to be necessary by the IEP team.

Students are required to demonstrate that they have mastered grade-level expectations in order to be promoted to the next grade. Grade-level expectations are based on the following:

- Scores on achievement tests
- Teacher evaluation of student's abilities and effort
- Proficiency assessments

When a student is identified as being at risk of retention, the student's parents/guardians will be notified in writing as early in the school year as practical. The student's parents/guardians shall be provided an opportunity to consult with the teacher(s) responsible for the decision to retain the student.

If a student is identified as performing below the minimum standard for promotion, the student may be retained in his/her current grade level unless the student's regular classroom teacher determines, in writing, that retention is not the appropriate intervention for the student. This determination shall specify the reasons that retention is not appropriate for the student and shall include recommendations for interventions, other than retention, that, in the opinion of the teacher, are necessary to assist the student in attaining acceptable levels of academic achievement.

Comprehensive Performance Measures

Athlos Academy of Utah will remain accountable to high standards and high performance through:

- Assessment reports presented at board meetings
- Proficiency reporting in the yearly annual report



- Regular communication with families regarding assessment data
- Setting annual school improvement goals with action plans each year which will be in harmony with the State Charter School Performance Framework

Please see the chart of [Mission Specific Goals](#) located in Section I of this document.

Educationally disadvantaged populations:

We do not intend to serve a large proportion of educationally disadvantaged students.

Section 6: Governance

Proper governance by the Board of Directors is critical for the ultimate success of a school. Board members of Athlos Academy of Utah view their position on the Board of Directors as one of community service, providing expertise and insight in order to help the school administration provide students with a superior education. Each board member realizes he/she has a fiduciary responsibility to look out for the best interest of the school—ultimately the children served. Each board member is a representative as the school, and as such will serve as a positive role model and liaison to the community on behalf of Athlos Academy of Utah. The Board of Directors takes its responsibility seriously, and will ensure compliance with legal obligations through appropriate accountability measures with the ESP and school administration.

Role and Responsibilities of the Board of Directors - The Board of Directors provides effective oversight and decision-making that demonstrates fidelity to the school's vision and mission, and ensures successful academic performance, responsible fiscal management, and development of strong leadership and operational systems. The Board of Directors sets the direction of the school through a strategic planning process, establishes clear performance targets, and regularly assesses the performance of the Principal and the school. The governance structure includes duly elected board members who may be asked to serve as officers (such as Chair, Vice Chair, Treasurer, or Secretary) and to participate in both standing and ad hoc committees (such as budget and finance, marketing and recruitment, or academic performance). The Board of Directors is composed of three to five qualified members who are passionate about the school's success and who bring professional expertise such as finance, facilities, law, business management, or program administration to the team. The Board of Directors has adopted a set of bylaws, compliant with state law and its charter, which it may amend through due process.

Governance vs. Management - While the Board of Directors is highly involved in the chartering process, once the school is approved their role becomes one of governance. The Board of Directors participates in ongoing training that highlights best practices in charter school board governance and utilizes resources developed by Brian Carpenter and Marci-Cornell Feist, both national leaders in charter board development.

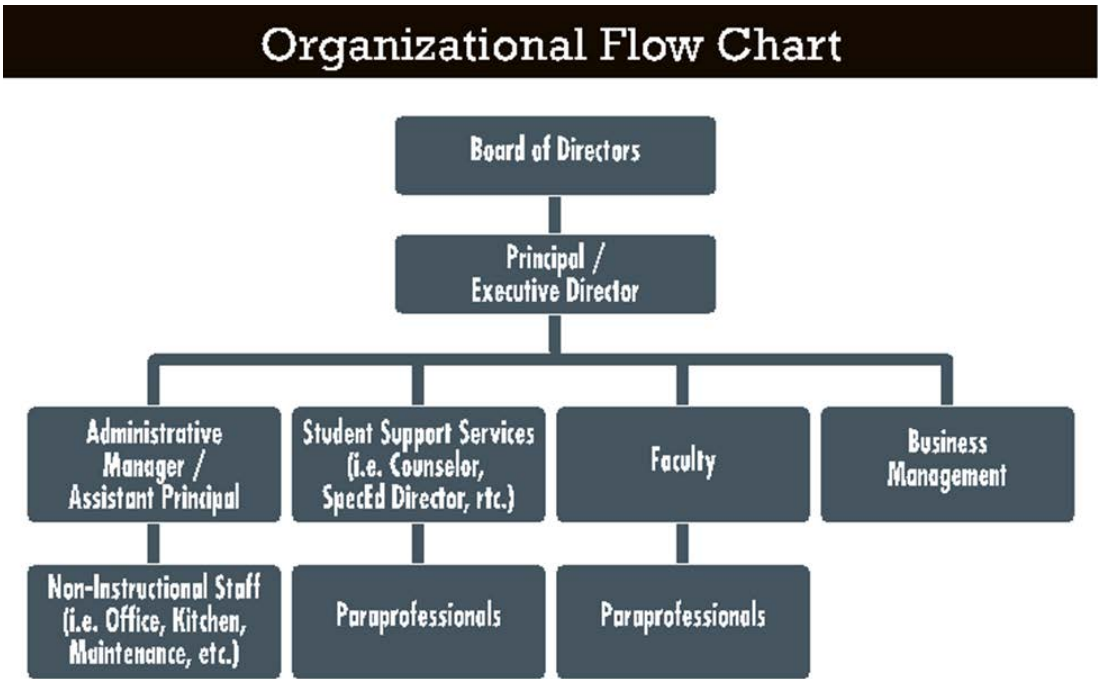
Board of Directors Training Plans – The Board of Directors participates in ongoing training based on best practices in charter school board governance. This includes orientation training for new board members, readings and discussions concerning issues important in the charter movement, completion of a series of modules that provide an overview of key best practices. The Board of Directors will also participate in an annual self-evaluation, and questions concerning the effectiveness of the Board of Directors will be included on the annual stakeholder survey. These data points will be evaluated at the annual Board of Directors retreat. All board members will complete the GBOT training modules provided by the Charter Schools Section of the Utah State Office of Education within three months of formal charter approval. New board members will be required to complete these training modules within three months of appointment to the Board of Directors as well.



Board Member Recruitment – The Board of Directors is currently recruiting two additional members living in the West Jordan/South Jordan community, and will develop a board recruitment policy that includes an application and interview process and an orientation training plan. The Board of Directors will also participate in an annual self-evaluation intended, in-part, to help identify gaps in professional expertise that may be useful to the Board of Directors in the future and to improve school governance.

Board of Directors Ethics: The Board of Directors will adopt a Conflict of Interest Policy that each member signs upon accepting appointment to the board. This policy addresses a board member’s duty to disclose any potential conflict of interest, how to determine if a conflict of interest exists, and how to address a determined conflict. The policy also addresses the rules of compensation and consequences for violation of the policy. This Conflict of Interest policy is established in order to ensure that the Board of Directors of Athlos Academy of Utah maintains high ethical standards. The Board of Directors will follow all rules as they relate to Open and Public Meetings law in Utah.

Governance Structure



Board of Directors Composition

Sean Morris Sean is the CEO of Blomquist Hale Employee Assistance a company that provides services to over 200 companies and 300,000 covered lives. He received his Master's Degree in Marriage and Family Therapy from the University of Southern Mississippi. He also holds a Bachelor's Degree in Family and Child Development from Weber State University. He is a Mental Health Designated Examiner and a Substance Abuse Professional. He also has been certified as a Family Life Educator and has been trained in Divorce and Child Custody Mediation. Areas of expertise are in leadership, crisis management, marriage and family issues, and marriage preparation. Sean has extensive experience in working with companies to both assist company leaders and employees with improving performance and overall success. He is a Board Member for Lawyers Helping Lawyers. Sean enjoys snow skiing, running, playing racquetball and being a dad.

Sean's motivation to serve on the Board of Directors of Athlos Academy of Utah is based on his belief that this school's vision and mission is to better the lives of children in the State of Utah. His educational background is in family and child development and this school will prepare children to live healthy and successful lives. His educational and professional experience will provide the Board of Directors with additional expertise in the area of child development as well as in fiscal management. Sean is excited to serve on this Board of Directors and be a part of this school's efforts to help this generation of students to be the best they can be mentally and physically.

Andy Lavin graduated from the University of Utah in 2002 with a degree in mathematics. Having discovered an unexpected interest in and talent for teaching while tutoring math during college, he decided to pursue a career in education and began teaching math in the Davis County, UT public school system. He spent three years there, during which his passion for education developed along with his insights to some of the difficulties inherent to traditional public schools. He was instrumental in helping get NUAMES started, and worked to develop their early-college program with Weber State University. He was then recruited as an assistant administrator to help open Legacy Preparatory Academy, where he valuable experience in school leadership.

Following his years at Legacy, Andy took a position as the Vice President of Operations for National Benefit Services, providing employee benefit administration services. Here, he continues to gain valuable skills and experience in business operations, client management, and workflow optimization.

Since leaving education for the business world, Andy has realized his passion is truly in teaching kids, and he has looked for opportunities to involve himself in it again. He is dedicated to the idea of results-based educational reform and is excited to play a part in bringing the innovative concepts of the Athlos model, including character education and fitness, to Utah.

Nichole Coombs is an Emmy award winning television producer who travels all over the country producing the nationally televised show The Story Trek currently in its seventh season. She also



produces local newscasts and special projects at KSL –TV in Salt Lake City, Utah. She was recruited to sit on the Board of Directors as she resides in the Jordan School District and is interested in the Athlos model. Her experience in a start-up charter is very valuable to Athlos. Nichole co-wrote the charter for Endeavor Hall in West Valley City, UT in 2008 and sits on its board as vice chair. She coordinates the school’s marketing and public relations as well as set up the lunch program.

Lisa Davis holds a PhD in microbiology and immunology and has taught extensively at the university level and through volunteer organizations in various communities in Utah and Colorado. As a parent and professional she is concerned about the health and well-being of children as well as academic achievement. She sees the Athlos model as an excellent way to help develop healthy, well-rounded and capable children.

Background Information Sheets

Name Nichole Coombs

Role with school Board Secretary

Expertise Marketing, PR, Media Relations

Statement of Intent:

This is the second charter school I have helped opened in Utah. For nine years, I have been part of the charter school movement as either a parent, member of the volunteer organization presidency or a board member. I understand the unique role charter schools play in educating students. I believe in the mission and vision of Athlos Academy of Utah and I am excited to serve as the secretary on the Board of Directors. This school provides a unique experience for those looking for a more balanced education that puts a higher emphasis on the marriage between mental and physical wellness as it relates to education. As a member of the community where Athlos Academy of Utah will be located, I understand the perspective of the stake holders the school will be servicing. I also understand the role a board member plays in setting policy for a school to be successful.

As a member of the media for the past 20 years, I intend to use my resources to further educate those in the community about Athlos Academy of Utah as well as help with marketing and any public relation issues that may arise.

Not-for-Profit History:

- *Vice Chair, Board of Directors, Endeavor Hall Charter School, West Valley City, UT, 2008-Present
- *PTA Board member over communications, Sunset Ridge Middle School, Jordan School District, 2014-Present
- *Volunteer Organization, Vice Chair, Monticello Academy, West Valley City, UT

Employment History:

- *Producer, The Story Trek, BYUtv/TKH Productions, 2013-Present
- *Producer, KSL-TV, Salt Lake City, UT, 2012-Present
- *The Valley Journals, Education Reporter, 2004-2012

Education History:

B.A., Broadcast Communications, University of Utah

Name- Sean M. Morris

Role with school- Board Chair

Expertise- Business

Statement of Intent:

Over ten years ago, my oldest child was in preschool and my wife and I knew we wanted to find a different and innovative way for our children to experience education. We found that charter schools were the way to achieve those desires. A friend told us about a group of parents getting together to discuss starting a charter school and we began meeting with a dozen other parents with similar educational expectations. We are now some of the founding members of Legacy Preparatory Academy, a charter school in Davis County. We have been able to see Legacy's growth from a handful of hopeful parents looking for a better way to educate our children, to the now overflow of children on waiting lists hoping to get into a well-established and successful charter school. What a challenging and rewarding experience it has been. All children should have this option!

I have a lifelong love of learning, place a strong value on education, and know that feeling like a successful learner or "good student" is very rewarding. I also know that I learned a lot about life and learning through physical activity. I have always loved sports, movement, and did better as a student when I didn't have to always "sit still". I have a great desire for my own children, and all children, to love learning and know that they can succeed in school and have confidence in their ability to be educated, in and out of the traditional classroom. I know that the overall school environment, curriculum and teaching methods, as well as the enthusiasm of the teachers will have a tremendous impact on a child's learning experience. For these reasons I have chosen to be a part of the Athlos Academy of Utah Board of Directors, particularly to serve as chair. I know that the Athlos Academy of Utah goals and education plan will help all its children to have a love of learning, build strong character, and develop curiosity in the world around them. Athlos Academy of Utah offers an innovative choice for our communities' children and families.

As a CEO of a successful company, my expertise in leadership, business growth and financial management will help Athlos Academy of Utah accomplish its goals, achieve its purpose, and uphold its charter. As a community leader I can reach out to others to build a strong foundation and support for a successful, beautiful, and highly desired school. Most importantly, as a father of four school aged children, I can understand what is needed for our students to be successful- a balanced mind, body, and character. Athos Academy can help children achieve in all aspects and be ready to compete for the very best!

Not-for-Profit History:

I have been involved in not-for-profit leadership for most of my adult life. I have had numerous positions of teaching youth, children, and adults in various circumstances and environments. I have mentored youth for nearly 15 years in various capacities. I currently give 15-20 hours per week on average to the service and benefit of families, couples and children in the community through service, counseling, and activities. I have over a dozen leaders under my stewardship who in turn oversee a group of over 500 individuals and families. I oversee the budget, mediate concerns, continually meet with others and set goals for growth and organizational improvement, and I certainly know how to give freely of my time to the success and emotional and physical well-being of the organization.

My wife and I have also given over 10 years of commitment to the creation and building of a successful charter school- Legacy Preparatory Academy in Davis County. We continue to give of our time and energy to make it a successful place of learning and growth through attendance and involvement at board meetings, staff meetings, volunteering time in classrooms and after school activities.

Currently I also serve as a board member for Lawyers Helping Lawyers.

Employment History:

I am the CEO of Blomquist Hale Consulting (BHC) Employee Assistance Program. As the CEO I am responsible for all business and financial decisions for the organization. Blomquist Hale provides services to approximately 250 other businesses. I am in a consultative position to these organizations in respect to business management, and improving both leader and employee success.

As a business leader I adhere to the highest standards of ethics, communication, and professionalism with clients, team members, and community partners. I work to achieve high levels of performance through implementation meetings, program development, creating policy and procedures, managing a budget, and anticipating and identifying issues and opportunities. I create and present trainings and seminars on a variety of topics, build relationships and network with both business and community leaders, collaborate with leadership teams, provide ongoing education and training to client companies as well as within BHC, develop culture by creating vision, and make sure to recruit and hire the right team for success.

Education History:

I graduated in August of 2000 with my Master Degree from the University of Southern Mississippi College of Health and Human Sciences with a Master Degree in Marriage and Family Therapy. I graduated in 1997 with my Bachelor Degree from Weber State University in Family and Child Development.

I am a licensed Marriage and Family Therapist, a Substance Abuse Professional (SAP), Family Life Educator, and have attended Wood Badge for the 21st Century.



BACKGROUND INFORMATION SHEET

Name: Andrew Lavin

Role with school: Board member

Expertise: Educational administration

Statement of Intent:

I am excited to be a part of Athlos Academy of Utah's governing board. I have had an interest in education and cognitive development since college, and from there it has developed into a passion. After earning a degree in mathematics and physics from the University of Utah I decided to pursue that passion by qualifying for a secondary education teaching license and teaching math in public schools for 3 years. I then became involved in the charter school movement through a colleague and found that it was working to solve many of the problems I found inherent to the public school system. I taught math and science at a Utah charter high school for two years before being hired as the Assistant Director for a new charter school in Davis County, Legacy Preparatory Academy.

I have been involved in private business for the last 5 years as the Vice President of a medium sized benefits administration company. I look forward to this opportunity to utilize my charter school teaching and administration experience together with my business experience to help develop a fantastic charter school experience.

Not-for-Profit History:

As the Assistant Director of Legacy Preparatory Academy, a K-9 charter school in Davis County, Utah, I had the opportunity to work at an educational non-profit. Legacy's governing board was very involved and active, and so I was able to witness and participate in its operation at a relatively detailed level. This experience provides me a unique look at charter school board governance from both a board and administration perspective.

Additionally, my current position as Vice President of Operations for a medium sized business provides me a great deal of experience on the operational side of business administration. I have often reflected during my experience at National Benefits that many of the operational challenges I have solved there have application to school administration. In particular, my experience in coordinating the efforts of management, employees, and board members will be valuable.

Employment History:

I have 5 years of experience teaching math and science and both public and charter schools. Of course, this experience is highly relevant to operating a charter school—I have intimate knowledge of the challenges teachers face in the classroom. I have direct experience in many of the pedagogical and management techniques that will be employed at Athlos Academy of Utah.

Additionally, I was the Assistant Director at Legacy Preparatory Academy for 3 years. This gave me broad exposure to administrative issues for both elementary and secondary education. As the Assistant



Director, I was responsible for the development and delivery of curriculum, teacher development and training, and behavior management. While not directly responsible for financial management and the business operations of the school, I was of course intimately involved with that as well.

Finally, my most recent employment as Vice President of Operations for National Benefit Services has given me valuable business experience. My responsibilities there include development of operational efficiencies and workflow optimization, risk management, leadership development, organizational communication, and product development in response to client value proposition and market opportunity.

Education History:

I graduated in May 2001 from the University of Utah with a B.S. in Mathematics as well as a Utah Secondary Education Teaching License. I earned my Level II Professional Educator License in January of 2009, with certifications in mathematics level IV, physics, and chemistry.

BACKGROUND INFORMATION SHEET

Name Lisa Ann Davis, PhD

Role with school board member

Expertise Education, parental/community involvement

Statement of Intent:

As a parent and an educator I am committed to improving education in Utah. I believe that there is a critical connection between the physical and emotional welling being of a child and the ability of a child to succeed in educational pursuits. The Athlos Academies model addresses concerns that many parents, myself included, have with the current approach to education and the decreased involvement of children in physical, emotional, and leadership building activities.

I have a MS and PhD in Microbiology and Immunology, which gives me a very unique perspective on how attending to the physical needs of the body leads to improved health and longevity. Using my formal degrees, I have been able to work as an educator on a college level for over a decade. I have also volunteered in elementary, junior high, and high school tutoring programs for an extensive part of my life.

I am passionate about teaching and finding new ways to reach out to all students. As a member of the board, I fully intend to bring my experience in both physical health and education to our discussions. I will strive to continually improve the educational experience of the Athlos Academies of Utah students by looking for new methods or improving tried and true ones.

Not-for-Profit History:

Starting in 1988, I have volunteered hundreds of hours in helping others succeed in education. I have participated in several community one-on-one mentoring/tutoring programs for at-risk students from a variety of socioeconomic and ethnic backgrounds. I have worked in several schools, both in Utah and Colorado as a tutor for struggling students in a variety of subjects. These experiences have introduced a variety of teaching methods and approaches to my educational perspective that I feel are helpful when considering new programs.

Schools where I have tutored and taught as a volunteer:

Utah: Quail Hollow Elementary, Albion Middle School, Brighton High School, Brigham Young University

Colorado: Montclair Elementary and Pomona High School

I have also held a variety of leadership positions within a religious setting and have had the opportunity to work with large group organizations. I have acted as the president of the



children's organization (December 2008-April 2011), which included children from ages 18 months old to 12 years old. As part of that position, I coordinated lesson schedules and appointed appropriate teachers for each age group. I was also involved in the execution of the Boy Scout program in the area. I have also acted as president of women's organization in Colorado (July 2003-May 2004) and am currently in that position here in Utah. This position involves coordinating service and welfare projects, in addition to planning of weekly meetings and monthly activities for women and their families. I have also worked with several high school and college aged pupils in leading and directing student based discussions on a variety of religious topics.

All of these experiences have increased my understanding of group dynamics and what it means to be a successful leader. I feel that this will be an asset that I can contribute to the Athlos Academies of Utah board.

Employment History:

ARAPAHOE COMMUNITY COLLEGE – Littleton, CO

Instructor (January 2008 – January 2014)

Experience with teaching the following courses: Biology 104 (Human Biology), Biology 105 (General Biology for non-majors), Biology 111 laboratory (General Biology for majors), Biology 201 (Anatomy and Physiology I), Biology 204 (Microbiology) lectures and labs.

Duties in the classroom include lecture design, oversight of laboratory experiments, exam generation, and grading for traditional and online courses

Participation in Sci Quest student organization as a guest lecturer on the topic of vaccines/autism association.

Worked with several members of the biology faculty to further develop courses and find new approaches to improve education.

ESCIENCE– Denver, CO

Technical Writer (July 2007 - January 2008)

Designer and scientific writer

Designed curriculum and laboratory experiments for an on-line/home school basic biology laboratory course

COMMUNITY COLLEGE OF AURORA (LOWRY CAMPUS) – Denver, CO

Instructor (Summer 2002)

Taught Biology 204 (Microbiology) lecture and lab

Designed lecture structure, laboratory experiments and class examinations.

Maintained standard classroom mechanics such as attendance, participation, and grading. Led one-on-one tutoring sessions and classroom reviews.



As listed above, I have had several opportunities to develop and execute new programs. I am comfortable with working with others and with complex issues. I believe this will aid the Athlos Academies here in Utah.

Education History:

Doctorate of Philosophy in Microbiology/Immunology – May 2008

University of Colorado

Masters of Science Degree in Microbiology- December 2001

Brigham Young University

Bachelor of Science Degree in Biology (minor in Chemistry) - May 1999

University of Utah

As part of my education at the University of Colorado, I was involved in a pre-doctorial trainee project.

NATIONAL JEWISH RESEARCH AND MEDICAL CENTER/UNIVERSITY OF COLORADO – Denver, CO

Pre-doctoral Trainee/Research Associate (August 2001 – May 2008)

Conducted research exploring biological functions of protein Phosphatidylserine Receptor

Designed experimental approaches, molecular tools and assays to address functionality

Utilized DNA sequencing, vector cloning, RT-PCR, siRNA knock down, cell culturing including transfection, western blots, fluorescent microscopy, flow cytometry, and ELISA techniques

Presented experimental data monthly and researched current scientific literature relating to project subject

As part of my education at Brigham Young University, I was involved in a Master's degree research project.

BRIGHAM YOUNG UNIVERSITY

Research Associate (January 2000-August 2001)

Conducted research exploring biological functions of Vitamin A and E on cancer cell growth

Designed experimental approaches, molecular tools and assays to address functionality

Presented experimental data and researched current scientific literature relating to project subject

Articles of Incorporation

ARTICLES OF INCORPORATION OF ATHLOS ACADEMY OF UTAH

The undersigned, acting as the incorporator(s), organized under and pursuant to the under the Utah Non-Profit Corporation and Cooperative Association Act ("Act"), adopts the following Articles of Incorporation ("Articles"):

Article I - Name

The name of the Corporation is Athlos Academy of Utah.

Article II - Duration

The corporation shall have perpetual existence.

Article III - Purposes

The Corporation is a nonprofit corporation consistent with the laws of the State of Utah and is not organized for profit. The purposes for which the Corporation is organized and will operate are within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986 (the "Code"), as amended, including:

A. For educational purposes within the meaning of Section 501(c)(3) of the Code, including to provide educational services to students in the Salt Lake County area as a public charter school, to support education initiatives, to help prepare students to be successful in life by developing healthy lifestyle habits and by providing a complete educational foundation, to support public charter schools organized under state law and pursuant to charters with public school districts, and to provide the general public with information about school choice and public charter schools.

B. For charitable, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code.

C. To exercise all powers granted by law to carry out the foregoing purposes, including, but not limited to, the power to accept donations of money, property, whether real or personal, or any other things of value. Nothing contained in these Articles shall be deemed to authorize or permit the Corporation to carry on any business for profit or to exercise any power or to do any act that a corporation formed under the Act may not at that time lawfully carry on or do.

D. Any other lawful purpose under the Act and/or the Code.

ARTICLES OF INCORPORATION OF ATHLOS ACADEMY OF UTAH - 1



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Utah Div of Corp & Comm. Code

09-29-14 01:24 RCV

Date: 09/29/14
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Amount Paid: \$30.00



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OF

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Article III - Purposes

The Corporation is a nonprofit corporation consistent with the laws of the State of Utah and is not organized for profit. The purposes for which the Corporation is organized and will operate are within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986 (the “Code”), as amended, including:

A. For educational purposes within the meaning of Section 501(c)(3) of the Code, including to provide educational services to students in the Salt Lake County area as a public charter school, to support education initiatives, to help prepare students to be successful in life by developing healthy lifestyle habits and by providing a complete educational foundation, to support public charter schools organized under state law and pursuant to charters with public school districts, and to provide the general public with information about school choice and public charter schools.

B. For charitable, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code.

C. To exercise all powers granted by law to carry out the foregoing purposes, including, but not limited to, the power to accept donations of money, property, whether real or personal, or any other things of value. Nothing contained in these Articles shall be deemed to authorize or permit the Corporation to carry on any business for profit or to exercise any power or to do any act that a corporation formed under the Act may not at that time lawfully carry on or do.

D. Any other lawful purpose under the Act and/or the Code.



Article IV – Membership / Stock

The Corporation will not have any class of members or stock.

Article V - Bylaws

Provisions for the regulation of the internal affairs of the Corporation shall be set forth in the Bylaws. (U.C.A. Section 16-6a-206)

Article VI - Directors

The affairs of the Corporation shall be managed by its Board of Directors. The number of Directors serving on the Board of Directors shall be fixed in accordance with the Corporation's Bylaws. Directors shall be elected in the manner and for the term provided in the Bylaws of the Corporation.

The names and addresses of the persons constituting the initial Board of Directors are:

<u>NAME</u>	<u>ADDRESS</u>
Sean Morris	1353 W 2050 S Woods Cross, Utah 84087
Nichole Coombs	6791 Liza Lane West Jordan, Utah 84081
Andy Lavin	78 South 300 East North Salt Lake, Utah 84054

Article VII - Incorporators

The names and addresses of those persons, all of whom are residents of the State of Utah, filing these Articles of Incorporation are:

<u>NAME</u>	<u>ADDRESS</u>
Sean Morris	1353 W 2050 S Woods Cross, Utah 84087
Nichole Coombs	6791 Liza Lane West Jordan, Utah 84081
Andy Lavin	78 South 300 East North Salt Lake, Utah 84054

Article VIII – Registered Office and Agent

The Corporation's registered office is 1353 W 2050 S Woods Cross, Utah 84087. The Corporation's Initial Registered Agent is Sean Morris.

Such office may be changed at any time by the Board of Directors without amendment of these Articles of Incorporation.

I hereby acknowledge and accept appointment as the Corporate Registered Agent:

Sean Morris

Article IX – Compensation and Distribution

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its members, directors, trustees, officers, or other private persons, except that the corporation is authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the Corporation's purposes. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on: (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code.

Article X – Dissolution

Upon dissolution of the Corporation, the Board of Directors shall, after paying or making provision for the payment of all liabilities of the Corporation, distribute all the assets of the Corporation for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code consistent with the purposes of the Corporation, or to a state or local government for a public purpose. Any such assets not so distributed shall be distributed by the district court of the county in which the principal office of the Corporation is then located, exclusively for the purposes or to such organizations, as such court shall determine to be consistent with the purposes of the Corporation.

Article XI – Indemnification

The Corporation shall indemnify Officers and Directors of the Corporation to the fullest extent permitted under the Act.

Article XII - Amendments

These Articles may be amended from time to time, in whole or in part, by the affirmative vote of two-thirds (2/3) of the Directors; provided that no amendment that diminishes the rights of USCSB (Utah State Charter School Board?) shall be adopted without the approval of USCSB.

Any such amendments shall be consistent with the corporation's status as a tax exempt organization under Internal Revenue Code Section 501(c)(3).

Article XIII - Affirmation

That they are all incorporators herein; that they have read the above and foregoing Articles of Incorporation; know the contents thereof and that the same is true to the best of their knowledge and belief, excepting as to matters herein alleged upon information and belief and as to those matters they believe to be true.

DATED this 25th day of September, 2014.

Sean Morris, Incorporator

Nichole Coombs, Incorporator

Andy Lavin, Incorporator

Bylaws

BYLAWS

OF

ATHLOS ACADEMY OF UTAH

A Utah Nonprofit Corporation

ARTICLE I ORGANIZATION

1.1 Principal Office. The principal office of Athlos Academy of Utah, a Utah Nonprofit Corporation ("Corporation"), is 1353 West 2050 South Woods Cross, Utah 84087. The Corporation may have other offices as the Board of Directors may designate or as the business of the Corporation may require from time to time.

1.2 Powers. The Corporation shall have such powers as are now or may hereafter be granted by the Utah Revised Nonprofit Corporation Act (the "Act"), or any successor legislation; except that such powers may be exercised only in furtherance of the purposes of the Corporation



as stated in its Articles of Incorporation and consistent with its status as a corporation described in Section 501(c)(3) of the Internal Revenue Code.

1.3 Registered Office. The registered office of the Corporation required by the Act, to be maintained in the State of Utah, is 1353 West 2050 South Woods Cross, Utah 84087, and may be changed from time to time by the Board of Directors, or as otherwise provided by the Act.

1.4 Seal. The organization shall not have a seal, but may design a logo.

1.5 Name Change. The organization may, by a two-thirds (2/3) vote of the Board of Directors, change its name.

1.6 Purpose. The purposes of the Corporation are set forth in the Articles of Incorporation.

ARTICLE II

Board Of Directors

2.1 General Powers and Standard of Care. The Board of Directors has authority to exercise all corporate powers and manage the business and affairs of the Corporation, except as otherwise provided in the Act or the Articles.

A Director shall perform his or her duties as a Director, including as a member of any committee of the Board of Directors upon which the Director may serve, in good faith, in a manner the Director reasonably believes to be in the best interests of the Corporation, and with such care as an ordinarily prudent person in a like position would use under similar circumstances. In performing his or her duties, a Director is entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:

(a) officers or employees of the Corporation the Director reasonably believes to be reliable and competent in the matters presented;

(b) legal counsel, public accountants or other persons as to matters that the Director reasonably believes to be within such person's professional or expert competence; or

(c) a committee of the Board of Directors upon which the Director does not serve as to matters within the committee's designated authority, which committee the Director reasonably believes to merit confidence;

but a Director shall not be considered to be acting in good faith if the Director has knowledge concerning the matter in question that would cause his or her reliance to be unwarranted. A person who performs these duties of a Director shall have no liability to the Corporation by reason of being or having been a Director of the Corporation.

2.2 Presumption of Assent. A Director of the Corporation who is present at a meeting of the Board of Directors at which any action on any corporate matter is taken is presumed to have assented to the action unless the Director's dissent is entered in the minutes of the meeting or unless the Director files his or her written dissent to the action with the Secretary of the meeting before adjournment of the meeting or forwards the dissent by certified or registered mail to the Secretary of the Corporation within three (3) days after the adjournment of the meeting. The right to dissent shall not apply to a Director who voted in favor of the action.

2.3 Number, Election and Qualification of Directors. The Board of Directors of the Corporation shall consist of at least three (3), but not more than five (5) members, with the exact number fixed pursuant to resolutions adopted by the Board of Directors. Each Director shall serve a term of three years. The names and addresses of the members of the first Board of Directors have been stated in the Articles. The initial Directors shall hold office until the third annual meeting of the Board of Directors, and until their successors are elected and qualified. At the third annual meeting of the Board of Directors, the existing Directors shall elect Directors to hold office for a three year term ending on the third annual meeting of the Board of Directors after each new Director is elected, and the Board of Directors shall be elected in a like manner every third year thereafter. Each Director will hold office for the term for which he or she is elected and until his or her successor is elected and qualified. Directors need not be residents of the State of Utah.

2.4 Vacancies. Any vacancy occurring in the Board of Directors may be filled by the affirmative vote of a majority of the remaining Directors, though less than a quorum of the Directors. A Director elected to fill a vacancy is elected for the unexpired term of the Director's predecessor in office. Any directorship to be filled by reason of an increase in the number of Directors may be filled by the Board of Directors for a term of office continuing only until the next regular election of Directors.

2.5 Removal of Directors. At a meeting of the Board of Directors called expressly for that purpose, any director may be removed with cause by a vote of a majority of the Directors then in office. Any Director may be removed at such a meeting without cause by a vote of two-thirds of the Directors then in office.

2.6 Committees of the Board of Directors.

2.6.1 Membership. The Board of Directors, by resolution adopted by the Directors then in office, may designate and appoint one or more Director committees, each of which shall consist of two or more Directors.

2.6.2 Authority. Director committees, to the extent provided in the resolution establishing the committee, will have and exercise the authority of the Board of Directors in the management of the Corporation; provided, however, that no Director committee may have the authority of the Board of Directors in reference to (i) authorize distributions, (ii) approve dissolution, merger or the sale, pledge or transfer of all or substantially all of the Corporation's assets, (iii) elect, appoint or remove directors or fill vacancies on the Board of Directors or on any of its committees, or (iv) adopt, amend or repeal the Articles or these Bylaws. The designation and appointment of



any committee and the delegation of authority to a committee does not operate to relieve the Board of Directors, or any individual Director, of any responsibility imposed on the Board of Directors, or any individual Director.

2.6.3 Tenure. Each member of a committee will continue as such until the next annual meeting of the Board of Directors of the Corporation and until a successor is appointed unless (i) the committee is sooner terminated, (ii) the member is removed from the committee, or (iii) the member ceases to qualify as a member of the committee.

2.6.4 Chairperson. The Board of Directors will appoint one member of each committee as chairperson.

2.6.5 Vacancies. Vacancies in the membership of any committee may be filled by appointments made in the same manner as provided in the case of the original appointments.

2.6.6 Resignation. Any committee member may resign at any time by giving written notice to the Board of Directors, the President, or the Secretary of the Corporation. Unless otherwise specified in the notice of resignation, the resignation takes effect upon receipt. Acceptance of the resignation is not necessary to make the resignation effective.

2.6.7 Removal. The Board of Directors may remove a member with or without cause.

2.7 Directors' and Committee Meetings. Meetings of the Board of Directors, regular or special, or meetings of any committee, may be held within or without the State of Utah. Unless otherwise specified in this section or in the notice for the meeting, all meetings will be held at the principal office of the Corporation.

Except as otherwise provided in this section, regular or special meetings of the Board of Directors or any committee may be called by or at the request of the President, any Director or the chair of a committee, as the case may be, upon written or verbal notice given to all other Directors or committee members, as the case may be, at least three (3) days before the meeting. The Board of Directors may provide, by resolution, the time and place for the holding of additional regular meetings without other notice than the resolution.

The attendance at or participation of a Director or committee member in any meeting constitutes a waiver of notice of the meeting, except where a Director or committee member attends or participates for the express purpose of objecting to the transaction of any business on the ground that the meeting is not lawfully called or convened.

Neither the business to be transacted at, nor the purpose of, any regular or special meeting of the Board of Directors or any committee need be specified in the notice or waiver of notice for the meeting.

2.8 Waiver of Notice. Whenever any notice is required to be given to any Director or committee member under the provisions of the Act, the Articles or these Bylaws, a waiver, in

writing signed by the person or persons entitled to such notice, whether before or after the time stated in the notice, is equivalent to the giving of such notice.

2.9 Quorum and Voting Requirements. A majority of the number of Directors constitutes a quorum for the transaction of business at meetings of the Board of Directors. The act of the majority of the Directors present at a meeting at which a quorum is present is the act of the Board of Directors. A majority of the number of committee members fixed and appointed by the Board of Directors or the President, as the case may be, constitutes a quorum for the transaction of business at a meeting of the committee. The act of the majority of the committee members present at a meeting at which a quorum is present is the act of the committee.

2.10 Action without a Meeting. Any action required by the Act to be taken at a meeting of the Board of Directors of the Corporation, or any action that may be taken at a meeting of the Directors or of a committee, may be taken without a meeting if a consent in writing, setting forth the actions so taken, is signed by all of the Directors, or all of the members of the committee, as the case may be. The consent has the same effect as a unanimous vote.

2.11 Compensation. No Director or committee member may receive a salary or compensation for services in that capacity. Directors or committee members may be reimbursed for actual expenses incurred in the performance of services as a Director or committee member. This provision does not preclude any Director from serving the Corporation in any other capacity and receiving compensation for services rendered in that capacity.

2.12 Director Conflicts of Interest. The Board of Directors shall adopt a Conflicts of Interest Policy. In addition to that policy, any Director who has an interest in a contract or other transaction presented to the Board or a committee for authorization, approval, or ratification must promptly and fully disclose his or her interest to the Board or committee prior to its acting on the contract or transaction. The disclosure shall include any relevant and material facts known to the Director about the contract or transaction that might reasonably be construed to be adverse to the Corporation's interest.

No Director may cast a vote on any matter that has a direct bearing on services to be provided by that Director, or any organization that he or she represents or that he or she has an ownership interest in or is otherwise interested in or affiliated with, which will directly or indirectly financially benefit the Director.

2.13 Loans to Directors. The Corporation shall not lend money to or use its credit to assist its Directors or Officers.

2.14 Liability of Directors for Wrongful Distribution of Assets. In addition to any other liabilities imposed by law upon the Directors of the Corporation, the Directors who vote for or assent to any distribution of assets, other than in payment of its debts, when the Corporation is insolvent or when the distribution will render the Corporation insolvent, or during the liquidation of the Corporation without the payment and discharge of or making adequate provisions for all known debts, obligations and liabilities of the Corporation, shall be jointly and severally liable to



the Corporation for the value of the assets that are distributed, to the extent that debts, obligations and liabilities of the Corporation are not paid and discharged.

A Director is not liable under this section if, in the exercise of ordinary care, the Director relied and acted in good faith upon written financial statements of the Corporation represented to Director to be correct by an officer of the Corporation having charge of its books of account, or certified by an independent licensed or certified public accountant or firm of accountants to reflect fairly the financial condition of the Corporation, nor shall the Director be liable if, in the exercise of ordinary care and good faith, in determining the amount available for a distribution, the Director considered the assets to be equal to their book value.

A Director is not liable under this section, if, in the exercise of ordinary care, the Director acted in good faith and in reliance upon the written opinion of an attorney for the Corporation.

A Director against whom a claim is asserted under this section and who is held liable is entitled to contribution from the persons who accepted or received the distribution knowing the distribution was made in violation of this section, in proportion to the amounts received by them respectively.

2.15 Telephone and Electronic Meetings. Directors may participate in a meeting through use of conference telephone, electronic video communication, or other electronic transmission so long as all of the following apply:

(a) each director participating in the meeting can communicate with all of the other directors concurrently, and

(b) each director is provided with the means of participating in all matters before the Board, including the capacity to propose, or to interpose an objection to, a specific action to be taken by the corporation.

2.16 Advisory Council. The Board of Directors, from time to time and in its discretion, may invite or appoint interested persons to a volunteer advisory council of the Board of Directors. Volunteer members of the advisory council will serve at the pleasure of the Board of Directors and will not vote, or have a vote, on any Board of Directors action. Advisory council members will be chosen or invited based on their interest in the Corporation's purposes and their expertise or ability to advise the Board of Directors on matters related to the Corporation's purpose.

ARTICLE III OFFICERS

3.1 Number. The officers of the Corporation will consist of a President, Vice President, Secretary, and Treasurer. The Board of Directors will elect the officers. The Board of Directors may elect or appoint other officers or assistant officers in the Board's discretion. Any two (2) or more offices may be held by the same person except the offices of President and Secretary.

3.2 Election and Term of Office. The Board of Directors will elect the officers of the Corporation annually at the annual meeting of the Board of Directors. If the election of officers is not held at the annual meeting, the Board of Directors shall hold the election as soon as practicable after the annual meeting. Each officer will hold office until a successor is duly elected and qualified, until the officer's death, or until the officer resigns or is removed.

3.3 Removal. The Board of Directors may remove any officer or agent whenever, in its judgment, the best interests of the Corporation will be served by removal. Any such removal shall not prejudice the contract rights, if any, of the officer or agent removed. Election or appointment of an officer or agent does not of itself create contract rights.

3.4 Vacancies. The Board of Directors may fill a vacancy in any office because of death, resignation, removal, disqualification or otherwise for the unexpired portion of the term.

3.5 President. The President is the principal executive officer of the Corporation and, subject to the control of the Board of Directors, will in general supervise and control all of the business and affairs of the Corporation. The President presides at all meetings of the members of the Board of Directors. The President may sign, with the Secretary or any other officer authorized by the Board of Directors, any promissory notes, deeds, mortgages, leases, contracts, or other instruments that the Board of Directors has authorized for execution, except in the cases where the signing and execution is expressly delegated by the Board of Directors or by these Bylaws to some other officer or agent of the Corporation, or is required by law to be otherwise signed or executed. The President will co-sign all checks or other deposit account withdrawals in excess of five thousand dollars (\$5,000.00) and, in general, will perform all duties incident to the office of President and any other duties as the Board of Directors may prescribe from time to time.

3.6 Vice President. In the absence of the President or in the event of the President's death, inability or refusal to act, the Vice President will perform the duties of the President. When so acting, the Vice President has all the powers of and is subject to all the restrictions on the President. The Vice President will perform other duties as the President or the Board of Directors may assign.

3.7 Secretary. The Secretary will attend all meetings of the Board of Directors and will prepare and maintain minutes of those meetings. The Secretary has custody of and shall protect all executed deeds, leases, agreements and other legal documents and records to which the Corporation is a party or by which it is legally affected. The Secretary will, in general, perform all duties incident to the office of Secretary and any other duties assigned to the Secretary by the President or the Board of Directors.

3.8 Treasurer. The Treasurer is the principal financial officer of the Corporation and has charge and custody of and is responsible for all funds of the Corporation. The Treasurer will sign all checks and promissory notes of the Corporation and will receive and give receipts for moneys due and payable to the Corporation from any source and deposit all moneys in the name of the Corporation in banks, trust companies or other depositories as selected by the Board of Directors. The Treasurer will keep or cause to be kept, adequate and correct accounts of the Corporation, including accounts of its assets, liabilities, receipts and disbursements. The



Treasurer will submit to the Board of Directors and the President, when required, statements of the financial affairs of the Corporation. The Treasurer will, in general, perform all financial duties incident to the office of Treasurer and any other duties assigned to the Treasurer by the President or the Board of Directors.

3.9 Salaries. The Board of Directors shall fix the salaries of the officers, if any. An officer will not be prevented from receiving a salary because the officer is also a Director of the Corporation. All compensation paid to an officer must be reasonable and will be based on the following factors: (1) the amount and type of compensation received by others in similar positions, (2) the compensation levels paid in the particular geographic community, (3) the amount of time the officer spends carrying out the duties of his or her position, (4) the expertise and other pertinent background of the individual, (5) the size and complexity of the organization, and (6) the need of the organization for the services of the particular individual.

3.10 Officer Conflict of Interest. Any officer who has an interest in a contract or other transaction presented to the Board of Directors or a committee for authorization, approval, or ratification shall make a prompt and full disclosure of his or her interest to the Board of Directors or committee prior to its acting on the contract or transaction. The disclosure must include any relevant and material facts known to the officer about the contract or transaction that might reasonably be construed to be adverse to the Corporation's interest.

ARTICLE IV STAFF

4.1 Employment. The Board of Directors has authority to employ an Executive Director and any other staff as the Corporation may reasonably require from time to time.

4.2 Terms of Employment. The Board of Directors must approve all compensation paid to a staff person. Compensation for staff personnel must be reasonable and will be based on the following factors: (1) the amount and type of compensation received by others in similar positions, (2) the compensation levels paid in our particular geographic community, (3) the amount of time the individual spends carrying out the duties of his or her position, (4) the expertise and other pertinent background of the individual, (5) the size and complexity of the organization, and (6) the need of the organization for the services of the particular individual. The terms and conditions of employment of the staff may be set forth in a written contract approved by the Board of Directors and signed by the Corporation and the staff person.

4.3. Staff Conflict of Interest. Any staff person who has an interest in a contract or other transaction presented to the Board of Directors or a committee for authorization, approval, or ratification shall make a prompt and full disclosure of his or her interest to the Board of Directors or committee prior to its acting on the contract or transaction. This disclosure must include any relevant and material facts known to the person about the contract or transaction that might reasonably be construed to be adverse to the Corporation's interest.

ARTICLE V MISCELLANEOUS

6.1 Indemnification of Officers, Directors, Employees and Agents. The Corporation may indemnify Directors, officers, employees and agents of the Corporation to the extent permitted by, and in accordance with, the Act. The Corporation may purchase and maintain insurance on behalf of any person who is or was a Director, officer, employee or agent of the Corporation against any liability asserted against the person or incurred by the person in any such capacity or arising out of the person's status as a Director, officer, employee or agent.

6.2 Books and Records. The Corporation shall keep and maintain, at its registered office or principal place of business: (i) correct and complete books and records of account; (ii) minutes of the proceedings of its Board of Directors and committees; and (iii) a record of the names and addresses of all members of the Board of Directors. Any books, records and minutes may be in written form or in any other form capable of being converted into written form within a reasonable time.

6.3 Loans. No loans shall be contracted on behalf of the Corporation and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

6.4 Contracts. The Board of Directors may authorize any officer or officer's agent or agents of the Corporation, in addition to the officers authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation. Such authority may be general or confined to specific instances.

6.5 Checks, Drafts, etc. All checks, drafts, or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Corporation shall be signed by the officer or officer's agent or agents of the Corporation as provided for in these Bylaws or in the manner determined by the Board of Directors.

6.6 Deposits. All funds of the Corporation not otherwise employed shall be deposited to the credit of the Corporation in the banks, trust companies or other depositories selected by the Board of Directors.

6.7 Gifts. The Board of Directors may accept on behalf of the Corporation any contribution, gift, bequest or devise for the general purposes of or for any special purpose of the Corporation.

6.8 Annual Financial Statements. The officers of the Corporation shall cause a balance sheet as of the closing date of the last fiscal year, together with a statement of income and expenditures for the year ending on that date, to be prepared and presented to the Directors at each annual meeting of the Board of Directors.

6.9 Fiscal Year. The fiscal year of the Corporation begins on the first day of July and ends on the last day of June each year, except that the first fiscal year will begin on the date of incorporation.



6.10 Regulation of Internal Affairs. The internal affairs of the Corporation are regulated as set forth in these Bylaws to the extent that these Bylaws are lawful under the Act. With respect to any matter not covered in these Bylaws, the provisions of the Act control so long as the Act is not inconsistent with the lawful provisions of these Bylaws.

6.11 Electronic Transmissions. Unless otherwise provided in these Bylaws, and subject to any guidelines and procedures that the Board of Directors may adopt from time to time, the terms “written” and “in writing” as used in these Bylaws include any form of recorded message capable of comprehension by ordinary visual means, and may include electronic transmissions, such as facsimile or email, provided (i) for electronic transmissions from the corporation, the corporation has obtained an unrevoked written consent from the recipient to the use of such means of communication; (ii) for electronic transmissions to the corporation, the corporation has in effect reasonable measures to verify that the sender is the individual purporting to have sent the transmission; and (iii) the transmission creates a record that can be retained, retrieved, reviewed, and rendered into a clearly legible and tangible form.

6.12 Amendments. These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by the Board of Directors of the Corporation at any regular or special meeting. In all cases, these Bylaws shall be compliant with Utah and Federal statutes and rules governing Charter Schools. In cases of any current or future conflict, the statute or rule shall govern,

The undersigned, being the Acting Secretary of the Corporation, does hereby certify that the foregoing Bylaws were duly adopted as the official Bylaws of the Corporation by unanimous consent of the Directors of the Corporation September 25, 2014.

Meeting Minutes

Athlos Academy of Utah Board of Directors Meeting Thursday, September 25, 2014

Call to order at 11:22

Present: Sean Morris, Andy Lavin, Nichole Coombs

Finance policies were reviewed as previously sent to board members. Nichole made a motion to approve, Andy seconded it. There was no discussion to the motion, a vote was taken and it passed unanimously.

Bylaws and Articles of Incorporation were presented; Sean made a motion to approve, it was seconded by Nichole Coombs. There being no discussion, a vote was taken, motion passed unanimously.

There being no further business, the meeting was adjourned at 11:40 a.m.



Section 7: Staffing

All staff members at Athlos Academy of Utah will meet or exceed the qualifications set out in state law. All teachers and administrators will be highly qualified and maintain appropriate certification as required by Utah state law. Athlos Academy of Utah will not employ teachers whose license to teach has been suspended or revoked by the Utah State Board of Education. All teachers, administrators, and paraprofessionals will participate in ongoing professional development. All employees at the school as well as any volunteers who may have unsupervised contact with children will undergo a criminal background check.

Evidence of certification and completion of a criminal background check will be maintained in personnel files at Athlos Academy of Utah.

Additionally, each member of the Athlos Academy of Utah team must be committed to the twelve *Performance Character* traits as they are expected to be role models in character development each day. The board may choose to adopt a merit pay plan for teachers as a means of incentivizing retention, as retention helps foster the development and strengthening of school culture.

Athlos Academy of Utah will participate in local job fairs, post open positions on the teachers-teachers website, as well as other websites. Additionally, faculty will be encouraged to recruit among competent colleagues who share the mission and vision of the school.

Athlos Academies will employ the school administration, consisting of the Principal, Assistant Principal, and Business Manager. Each of these employees will be evaluated by the school as part of the overall ESP evaluation each year. Administrative support staff, faculty, paraprofessionals, media specialist, guidance counselor, and maintenance employees will be employees of the school. The administrative team will have oversight from and access to staff and support at Athlos Academies in order to ensure the program is implemented with fidelity and students are making gains in each of the three pillars. Specific job descriptions are listed below, with the exception of the performance coach, whose job description was explored in depth in Section 4: Program of Instruction.

Principal

Educational and Program Management

- Demonstrate commitment to the Philosophy, Mission, Vision, and Values of the school
- Possess an entrepreneurial spirit that embraces creativity and dedication
- Possess the ability to learn new things quickly and adapt to changing situations
- Possess skills in school operations and an understanding of state standards
- Possess knowledge of the school's academic programs and methodologies and have a thorough understanding of the Utah State Core Curriculum
- Possess student behavior management skills that focus on positive, effective discipline
- Evaluate instructional program effectiveness



- Develop and enforce policies and procedures
- Manage fiscal budgets, physical resources and personnel
- Devise, implement and evaluate instructional development programs
- Perform hiring, supervision, evaluations and terminations of instructional staff
- Implement effective educational process through the collection and interpretation of student data
- Coordinate with other administration to ensure the school instructional programs further the school's mission
- Work with other administration (including members of the Board of Directors) on the development, purchase, distribution, and evaluation of curriculum materials
- Work with other administration (including members of the Board of Directors) to develop required plans for state and federally funded programs
- Work with other administration and the Business Administrator to coordinate state and federal reports of fiscal data
- Collaborate with Board of Directors committees and other school administrators on planning, operation, supervision and evaluation of the program's and student success
- Collaborate with staff for united school improvement plan.
- Document operations of charter programs to develop accurate budgets, procurement and spending
- Work with Business Administrator to maintain fiscal control; Report accurate fiscal information
- Ensure school facilities are managed effectively. Oversee facilities to ensure maintenance provides a clean and safe school
- Collaborate with staff to implement a student discipline plan that encourages a positive learning environment and enhances student's behavior
- Provide for uniform enforcement of school standards and oversee appropriate and reasonable student discipline as issued in accordance with school policy
- Hold and attend parent/teacher/student conferences in regards to student and school issues
- Ensure necessary and reasonable measures are taken to protect students, staff, equipment, materials, and facilities

Staff Management, Training and Motivation

- Provide training, tools, and all necessary information for each staff member to successfully perform their job functions
- Instruct staff about performance requirements in relation to instructional strategies, classroom management, and communication with the public
- Observe all classes regularly, both formally and informally
- Hold employee evaluation conferences based on records of performance observations
- Ensure collaboration, partnerships and team building among staff, including decision-making and problem solving
- Oversee and assess the performance of all school employees



- Manage conflicts and relations between school employees justly and efficiently
- Evaluate the effectiveness of outside service providers
- Oversee employee screening measures to ensure that each employee has undergone an appropriate background check
- Instruct staff of performance requirements in relation to instructional strategies, classroom management, and communication with the public
- Ensure effective, research-based professional development is provided and implemented
- Attend and present training and information, as requested, during scheduled staff and committee meetings

Fiscal and Legal Compliance

- Abide by all state and federal laws that apply to charter schools and charter policy
- Ensure that there is proper documentation on operations of charter programs to develop accurate budget
- Ensure compliance of budget guidelines. Work with Business Administrator to maintain fiscal control. Report accurate fiscal information
- Ensure smooth operation of school facilities, school finance and risk management, including appropriate procurement of insurance policies
- Ensure school-wide compliance with all policies and procedures. Abide by all state and federal law that apply to charter schools, charter policy and Board of Directors policy
- Attend all required Board of Directors and state meetings, including the monthly Charter Directors' meeting
- Attend other meetings and training that provide legal guidance
- Participate in the school's annual fiscal audit and oversee the preparation of the school's Annual Budget, Annual Financial and Annual Program Reports
- Ensure school safety by performing fire drills and other drills.

Special Education

- Coordinate with the Special Education Director on student Individual Education Plans to ensure all modifications are met
- Ensure that Special Education Director attends regular LEA meetings provided by the State and follow up on content of trainings
- Keep abreast of changing laws and regulation that apply to Special Education
- Ensure General Education teaching mentors are trained on Special Education needs of students and the school's vision of inclusion
- Ensure annual and periodic special education data uploads and reporting meets appropriate state and federal requirements

Public Relations and Communications

- Establish rapport with parents, students, school staff, and Board of Directors members
- Create and maintain a professional relationship with colleagues, students, parents, and community



- Coordinate with the school's parent organization to increase parental involvement and activity within the school
- Communicate and assist in teacher communication with parents regarding student progress
- Maintain communication with parents, staff, and other educational professionals to circulate professional research, ideas and information
- Convey the charter's mission to students, parents, staff, and the overall community and encourage support in accomplishing the mission
- Illustrate understanding of charter and community needs and begin activities to meet those needs
- Build positive relations with state education departments and other charter school operators

Professionalism

- Uphold and enforce board policy, administrative procedures, and school rules and regulations, and be supportive of such in your communications with students, parents, and the public at large
- Maintain appropriate work habits, including regular and punctual attendance and appropriate use of conference and planning time
- Communicate the positive aspects of Charter to the public in word and deed
- Work cooperatively with parents and teaching mentors to strengthen the educational program for children
- Establish and maintain cooperative relationships with other staff members
- Assist with overall school operations as necessary or assigned by the Board
- Attend and participate in all professional development days and activities

Assistant Principal

Educational and Program Management

- Supervise instructional and curriculum staff and services to address student achievement
- Devise, implement and evaluate instructional development programs
- Supervise teaching mentors and aides, regularly observe classes and groups, and coordinate the development of training programs in methods, content, and structure
- Assist in hiring, supervision, evaluations and terminations of instructional staff
- Implement effective educational process through the collection and interpretation of student data
- Coordinate with the school Director and other administration to ensure the school instructional programs further the school's mission
- Work with the School Director and Business Administrator to coordinate state and federal reports of fiscal data
- Manage the instructional professional development program



Classroom Management and Organization

- Under the direction of the school Director, manage student behavior and discipline
- Train teaching mentors in methods of classical education to enhance instruction as prescribed by charter's curriculum and methods
- Train teaching mentors and instructors on how to manage student behavior in agreement with the school's code of conduct and related policies and programs
- Ensure necessary and reasonable measures are taken to protect students, equipment, materials, and facilities
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.
- Undergo training in managing the behavior of students according to Individual Education Plan requirements.
- Assist students with disabilities to encourage their access to full participation in the school's regular programs

Communication

- Establish rapport with parents, students, school staff, and board members
- Create and maintain a professional relationship with colleagues, students, parents, and community
- Communicate and assist in teacher communication with parents regarding student progress
- Maintain communication with parents, staff, and other educational professionals to circulate professional research, ideas and information

Evaluation and Reporting

- Provide/receive student performance measurements to/from teaching mentors who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as requested to discuss needs and progress of students.
- Use effective oral and written communication.
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Teachers

- Plan and implement a program of instruction that, while demonstrating a strong grasp of the subject matter, adheres to Charter philosophy, goals and objectives as outlined in the academic program and the Utah State Core using curriculum selected by the school.
- Keep an accurate, up-to-date record of student performance and progress throughout the year, and meet with parents and communicate with others as needed, assigned, or requested.



- Accommodate students with IEPs as required and recognize learning problems making referrals as appropriate.
- Develop curriculum and lessons using original sources as the basis for instruction and assignments
- Oversee and assess teaching assistants, support personnel and other staff working under the direction of the teaching mentor, including 3rd party entities and volunteers.
- Empower teaching assistants to teach in the Socratic model and to work with small groups of students during Mentor instructional time
- Maintain confidentiality in all aspects of the job. Ensure that student, staff and family privacy is maintained by withholding any and all personal information on any person(s) from unauthorized recipients.
- Contribute to a positive work and school environment by maintaining a positive, pleasant demeanor in all situations and communications.
- Attend staff development activities and seminars to enrich job skills and abilities as assigned by administration and attend all required meetings and events as communicated by supervisors and as outlined in company policies and manuals.
- Develop, in accordance with Charter guidelines and policy, reasonable rules of classroom behavior and appropriate techniques.
- Consistently apply classroom and school behavior management plans.
- Take necessary and reasonable precautions to protect students, equipment, materials and facilities.
- Ensure school safety by assisting with fire drills and other emergency response drills.
- Keep educators' license and endorsements up-to-date and applicable to assignments.
- Participate in professional development programs
- Keep licensure current and demonstrate growth toward higher levels of certification and Highly Qualified Teacher status

Teaching Assistant

Classroom Management

- Under the direction of the special education teacher or Director, school Director and teaching mentors, assist with the management of student behavior and discipline, primarily for students with disabilities.
- Use classroom management plan consistent with teacher's techniques, school-wide standards and Least Restrictive Behavioral Environment
- Assist with student discipline including removal of disruptive students from class and escorting students to office.
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.
- Undergo training in managing the behavior of students according to Individual Education Program requirements.



- Assist students with disabilities to encourage their access to full participation in the school's regular programs

Classroom Instruction

- Act as a classroom substitute when necessary or when the teaching mentor is unavailable
- Assist teaching mentors with classroom instruction as assigned, including providing individualized instruction, working with small groups, teaching sections of lessons, and all other assignments consistent with school standards and teaching mentor plans.
- Work with teaching mentor to accommodate students with IEPs as required
- Recognize learning and behavior problems and communicate student needs to general and special education teaching mentors as appropriate.
- Demonstrate a strong grasp of subject matter.

Evaluation and Reporting

- Provide student performance measurements to classroom teaching mentor who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as requested to discuss needs and progress of students.
- Use effective oral and written communication.
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Special Education Teacher/Director

Supervisory Responsibilities

- Oversee and assess teaching mentors, instructors, assistants, support personnel and other staff working with special education students
- Directly supervise special education faculty and staff
- Evaluate the effectiveness of special education staff and outside service providers

Program Management and Compliance

- Assist in the creation and outfitting of facilities for students with disabilities
- Continually supervise curriculum program to ensure it is pertinent to student's needs
- Administer guidance in composing and implementing outside service contracts for special education students
- Direct the fiscal aspects of the special education department with the Business Manager and confirm that programs are cost effective and funds are managed within budgets
- Perform all state and federal special education reporting at year end and periodically and as required during the school year
- Coordinate and lead the school's state and federal audits of special education reporting and data
- Enter special education data accurately into the school's Student Information System to ensure accuracy in reporting and appropriate and adequate funding is received



- Ensure that adequate supplies and equipment are available
- Evaluate special education program quality through assessment findings, including student achievement data
- Stay abreast of and abide by state and charter regulations and policies for charter schools
- Advise on policy and program improvements
- Confirm that policies established by federal and state law, and the charter policy in area of Special education are being met
- Gather, manage and file all hardcopy and computerized reports, records, and other documents required by charter, state and federal regulations

Evaluation and Reporting

- Provide student performance measurements to teaching mentor who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as requested to discuss needs and progress of students.
- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Classroom Management

- Under the direction of the school Director manage student behavior and discipline, primarily for students with disabilities.
- Use classroom management plan consistent with students' IEPs, school-wide standards and Least Restrictive Behavioral Environment
- Assist with student discipline including removal of disruptive students from class and escorting students to office.
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.
- Undergo training in managing the behavior of students according to Individual Education Program requirements.
- Assist students with disabilities to encourage their access to full participation in the school's regular programs

Classroom Instruction

- Assist teachers with classroom instruction as assigned, including providing individualized instruction, working with small groups, teaching sections of lessons, and all other assignments consistent with school standards
- Work with teaching mentors to accommodate students with IEPs as required
- Recognize learning and behavior problems and communicate student needs to staff as appropriate.
- Provide instruction as assigned according to students' IEPs, including providing individualized instruction, working with small groups, teaching sections of lessons, and all other assignments consistent with school standards



- Integrate the Socratic Method and Classically-based instructional practices into Individualized Education Programs as appropriate and ensure that IEP students receive instruction consistent with their individualized programs and the school's charter
- Train school staff in appropriate methods and strategies for helping students with disabilities to have access to and participate fully where possible in regular school programs

Special Education Student Management

- Oversee and maintain special education programs and services to meet students' needs
- Ensure that student progress is reviewed on an ongoing basis and that the results are used to make adjustments to Individual Education Plans
- Ensure special education referral process requirements are met. Arrange for, or conduct evaluations, advise on placement and program management for each student
- Collaborate with school administration and other service providers (Counselor, Speech Therapist, etc.) and teachers on student Individual Education Plans to ensure all modifications are met
- Collaborate with parents, students, and teachers through conferencing on vital issues
- Ensure necessary and reasonable measures are taken to protect students, equipment, materials, and facilities

Media Specialist

Classroom Management

- Oversees student discipline and assists teaching mentors with student behavior while students are in the library.
- Use classroom management plans consistent with teacher's techniques and school-wide standards.
- Share responsibility during the school day for the supervision of students in all areas of the school, including pick-up and drop-off, recess, lunch, assemblies, field trips, and other responsibilities as assigned.

Media Center Administration

- Plans, implements and evaluates the media center's program, policies, and services that support the school's mission and instructional objectives.
- Requests and administers the media center budget.
- Seeks out original source volumes and materials as the basis of the library's inventory
- Prepares for the opening of the media center so that services are available from the first day of school until the last day of school.
- Serves on appropriate school committees.
- Recommends for selection, trains, and may supervise other media center staff.
- Assists in planning for adequate media center equipment and supplies.
- Maintains the media center so that it is attractive and efficient to use.
- Writes reports relating to the media center as necessary or required.



- Prepares requests for funds relating to the media center from federal and other resources.
- Coordinates public relations highlighting the media center program and services.
- Designs a schedule that ensures timely access to media center resources for all students and staff, as well as time for library management activities.

Instructional Support

- Collaborates with teachers in implementing integrated instructional activities, applying current instructional strategies.
- Prepares bibliographies and lists of resources.
- Coordinates with teaching mentors on the original source content available in the media center
- Coordinates a variety of services, including class visits, individual and small group projects.
- Serves as information specialist to assist teachers and students in selection and use of instructional and project materials.
- Conducts staff orientation to the media center's services and programs and original source volumes and online services.
- Provides library/technology in-services training activities for staff.
- Coordinates selection of materials for library collections and special units of study.

Resource Management

- Develops, updates and publicizes the school library materials selection policy.
- Reviews professional journals, bibliographies, selection aids, publishers' catalogs and brochures and routes these to staff as appropriate.
- Confers with sales representatives and communicates to staff and administration as appropriate.
- Consults with staff and students in evaluating, selecting and acquiring library resources, with emphasis on original source material, and equipment.
- Provides a variety of print and media/technology related resources.
- Classifies, catalogs, and organizes the media center's materials for maximum accessibility and availability.
- Procures and maintains an inventory of the media center's materials and equipment.
- Maintains a system for circulating and retrieving the media center's resources.

Counselor

Counseling Plan Development and Management

- Uses data to discuss, develop and continually improve the school's comprehensive school counseling program and work with school leaders and suggests and implement improvements to the program
- Communicates the goals and objectives of the school counseling program to administrators, teachers, students, parents, and the Board of Directors (as requested)



- Manage the school's referral process as a part of the schools comprehensive school counseling program
- With teachers and administrators, develop individualized program plans for each student
- Ensure the comprehensive school counseling program's compliance with applicable standards, laws, rules, and ethical standards of the school counseling profession
- Stay abreast of and abide by state and charter regulations and policies for charter schools
- Advise on policy and program improvements
- Ensure that policies established by federal and state law, and the charter policy in area of school counseling are being met
- Gather, manage and file all hardcopy and computerized reports, records, and other documents required by charter, state and federal regulations
- Conduct an annual audit of the comprehensive school counseling program to ensure effectiveness

School Counseling Program Delivery

- Provides leadership and collaborates with other educators in the school-community regarding school counseling needs
- Implements appropriate, prevention-oriented activities to meet student needs and the goals of the program
- Provide individual and group counseling to students with identified concerns and needs
- Uses assessment tools and techniques for determining and structuring individual student and group counseling techniques and services, including their effectiveness
- Works with parents/guardians to assist student to implement life skills that students need to be successful, including education, career and life planning needs, according to the school's charter
- Assists students individually or in small groups with the development of academic, career and personal/social skills, goals, and plans
- Ensure that student progress is reviewed on an ongoing basis and that the results are used to make adjustments to plans if applicable
- Collaborate with school administration and other service providers (Special Education staff, Speech Therapist, etc.) and teachers on student counseling plans to ensure all modifications are met
- Collaborate with parents, students, and teachers through conferencing on vital issues
- Communicates effectively with parents/legal guardians, teachers and administrators regarding students' concerns and needs and helps them to interpret and understand assessment and other data

Evaluation and Reporting

- Provide student performance measurements to teaching mentor who will keep an accurate, up-to-date record of student performance and progress throughout the year.
- Meet with parents as needed to discuss needs and progress of students.



- Respect the confidentiality of records and information regarding students, parents, and teachers in accordance with accepted professional ethics, and state and federal laws.

Secretaries and Receptionists

Registration, Records, Data and Correspondence

- Prepare data for school, state, and federal reports
- Organize and manage hardcopy and electronic school and student files
- Act as school registrar for student information and records
- Receive, sort and deliver mail and other documents to staff
- Record and track parent volunteer hours
- Draft correspondence, forms, reports, etc. as requested by the School Director and other administrative staff
- Oversee school calendar, scheduling, and appointments for administrative staff and the school facility
- Maintain personnel time records including leave requests, substitutes, and payroll reporting
- Attend meetings with school Director and take meeting minutes
- Training all users on the school's chosen Student Information System (SIS)
- Disperse and manage paperwork for newly enrolled students
- Assist, manage and access information for various school and government required reports
- Complete regular updates of the student information system
- Assist Administration and teachers in accessing information and running necessary reports
- Run Year-end and/or rollover processes and School Finance & Statistics Data Uploads and set-up up new year programming
- Preparing and coordinating class schedules, maintaining enrollment processes and coordinating class schedule changes
- Record and track attendance as required for school and state reports
- Maintain school and student files, both electronic and hard copies
- Maintain and ensure the confidentiality of records and information regarding students, parents, and staff in accordance with accepted professional ethics, state and federal laws

Accounting

- Attend to routine bookkeeping duties
- Maintain personnel time records including leave requests, substitutes, and payroll reporting
- Order, receive, and inventory school supplies and materials
- Receive donations and cash for purchases, following proper internal controls to account for funds consistent with school policy

Customer Service

- Answer incoming calls, take accurate messages, and transfer to appropriate staff
- Coordinate substitutes with School Administration
- Assist with the daily arrival and departure of students



- Greet and assist students, parents and the general public
- Assist with school events, including parent/teacher conferences as requested
- Work with the Parent Organization
- Coordinate information with school newspaper

All Employees

- Handle multiple tasks.
- At times handle and maintain control in high-stress situations.
- Maintain confidentiality in all aspects of the job. Ensure that student, staff and family privacy is maintained by withholding any and all personal information on any person(s) from unauthorized recipients.
- Contribute to a positive work and school environment by maintaining a positive, pleasant demeanor in all situations.
- Provide positive reinforcement to students, staff and visitors.
- Communicate effectively and politely with co-workers, students, volunteers, parents and visitors to the school and foster and maintain cooperative relationships.
- Ensure school safety by assisting with fire drills and other drills.
- Attend staff development activities and seminars to enrich job skills and abilities as assigned by administration.
- Attendance required meetings and events, including meetings or events at irregular hours or on extended days, including meeting the reasonable expectations of school Administration.
- Coordinate schedules and meetings. Attend meetings as appropriate or as assigned.
- Adhere to school and administrative policies as instructed and/or outlined in school policy manuals, handbooks or other corporate materials.
- Organize and maintain files and records.
- Perform other duties which may develop or as requested.



Section 8: Business Plan

Athlos Academy of Utah will be transparent, efficient, and compliant with all laws in its budgets and financial operations. That philosophy is the foundation of the school's business plan. Athlos will target the public funds entrusted to it to accomplish the mission as explained in this charter, consistent with the approach approved in this charter, and in line with state laws and regulations governing public education and the use of public tax dollars.

Key Budget Assumptions

Athlos' budget has several key components that highlight the unique aspects of the school's program that sets the school apart. Observers will see that the school has a more robust faculty than most K-9 charter schools, as Athlos will have HPE Teachers, Sports Performance Coaches, and Exceptional Child faculty and staff (see Section 7: Staffing for descriptions of each). The school's budget also calls for a large facility to accommodate the athletics that are part of each child's school day and for increased equipment used in Sports Performance classes. The model has been shown to be successful at recruiting students and at helping them achieve high levels of academic outcomes, so the school anticipates full enrollment in the first and second year, though it has also created a contingency plan in case of enrollment coming in significantly lower than expectations.

THE BUDGETARY PLAN

Planning Year: As the school begins its planning and startup year, Athlos Academy of Utah will apply for the available grants, loans, and other funding that will provide resources to successfully plan and lay the foundation for a successful charter junior high and high school. It is anticipated that \$410,000 will be available to the school in its planning year in a combination of grants and loans from state sources. That money will allow the school to implement the following plan, with some funding carrying forward into the first operational year to complete the purchase of supplies and equipment necessary to successfully start school:

In lieu of having paid staff, the school will engage with a Charter Management Organization (see Section 9: Education Service Provider) to complete the work of startup. (See timeline below.) \$50,000 (line 24.300) is budgeted for this during the startup year which will provide part-time services that a Director, registrar, business manager, building officer, and IT technician might normally provide if the school didn't have a CMO.

An advertising campaign, budgeted at \$10,000 (line 21.300 in the budget document) to build awareness and recruit students to attend CI, overseen by the Director.

A recruitment campaign to recruit teachers, budgeted at \$5,000 (line 22.300), which will pay for advertising of job openings, presence at teacher hiring fairs, as well as funds to support recruitment and relocation assistance for teachers and specialty faculty.



\$2,000 (line 26.500) for liability insurance and communication (Internet and telephone) services in the planning year.

Educational equipment (lines 10.641, 24.600 and 10.700) which includes the texts, materials, curriculum, desks, chairs, and other furniture and equipment one might commonly find in any school, plus athletic equipment, technology, first-aid supplies, and network infrastructure that are necessary to carry out the school's specific mission. This is budgeted at \$232,000 in the startup year with additional to come in the first operational year. This amount will furnish the school with the materials and equipment it needs to meet its contingency enrollment plan, which will lead to lower expenses under that plan in the first operational year.

Computers for administration and faculty budgeted at \$33,400.

The school's administration, with the above tools, will have Athlos in prime position to educate more than 1,000 students as the school opens in 2016, supported by the budget outlined below.

Operational Year 1: The school will continue to invest its dollars to support the program outlined in this charter. As the school operates, Athlos will have somewhat higher expenses than many other schools in teaching faculty and staff, while the costs of administration are covered by a CMO. The building, while specialized, is in line with authorizer standards for facility occupancy costs based on the school's enrollment and revenue projections.

More specifically, the operational year budgets include:

State and federal revenue based on the provided funding worksheet plus reasonable assumptions for inflation adjustments and special populations funding based on schools of similar size.

Local funding based on enrollment, assuming that 25% of students will qualify for and eat reduced-price or free school-provided lunch, with 50% of the rest also buying school lunch and an average of \$50 per student in fundraising and school activity revenue. Athlos Academy of Utah anticipates that this will actually be higher based on the donations that the school will solicit at athletic performance events, but for the sake of this budget, the number is provided conservatively based on similarly-sized charter schools in Jordan School District.

Fifty-one full-time teachers: These teachers include classroom instructors for four sections at each grade with 26 students per section, three fine arts teachers, three HPE teachers, three Sports Performance Coaches, two Exceptional Child teachers, and two special education teachers. Athlos Academy of Utah is carrying out the program with the staff hired.

The budget includes a \$2,000 average bonus for teachers paid based on student and parent satisfaction, academic achievement, professionalism, and classroom observations.

To support the teachers, Athlos will hire two general instructional assistants that can act as substitute teachers and fill in for teachers doing observations or training, plus provide extra assistance to small groups as needed. Additional paraprofessionals include six Exceptional Child aides and six Special Education aides.

Though it is well in excess of legal requirements for a K-9 school, Athlos will provide two school counselors who can help students as they move through the educational program. Students will need help balancing athletics with academics, and counselors will help students strike that balance as well as provide traditional and legally required scheduling and counseling services for students at grades seven and above.

The school will also have a librarian who will oversee the school's library and media center. (A significant investment for library materials is also included in the budget.)

Athlos will prepare and serve lunch and breakfast (as determined necessary and appropriate) to students using its own kitchen facilities and faculty. The wages for lunch personnel are included on line 31.100 with food and other supplies included on lines 31.630 and 31.600, respectively.

The total expense is in line with revenue brought in for that purpose.

The school will have two full-time facilities maintenance and custodial staff plus a few lower-paid janitorial part-time staff to keep the facility clean and safe.

The school will put in place retirement, medical and other benefit programs to ensure that the school offers a competitive compensation package for educational professionals. Total benefits are budgeted at 24% of wages and salary. Athlos does not intend to participate in the Utah Retirement System.

Athlos will invest heavily in the professional development of teachers, to the tune of \$55,000 (line 21.300) to help teachers successfully implement the school's academic program and integrate it with the athletic component that is key to student academic success. Professional development continues, though with lower investment required in the ongoing training of experienced teachers. The investment will still be made, but only to keep training up and initial training of new teachers.

The school will outsource some special education services to specialists, including compliance and speech and occupational therapy. A budget of \$100,000 is set aside for this purpose, which is consistent with the financial reports of schools of a similar size.

The CMO will administer all aspects of the school, including compliance, academics, teacher development, charter fidelity, and business operations. The cost is \$900 per student. (See Section 9: Education Service Provider for full details of the CMO relationship.)



Athlos will outsource its IT support, which total of \$45,000 is included in line 24.300 with the CMO.

The school's facility budget is calculated based on the known requirements of the building used by other schools using the Athlos model around the country. This basis of cost gives Athlos real specificity in predicting facility costs (see Facility subsection below). The first year assumes only 11 months of occupancy and only \$5,000 in property tax, because the lot would have been undeveloped for the majority of the tax year. Facility costs jump in operational year two as occupancy lasts for twelve months and property tax is charged based on the improved facility during the tax year.

The school will purchase insurance to cover its liability and that of its staff and board against tort claims. Communication expenses are included with insurance in line 26.500.

The facility's utility, maintenance, and supply costs are also included in the budget, on lines 45.400, 26.600, and 26.700, adding an additional \$117,440 per year in maintenance and operations costs. In total, occupancy and related expenses make up 18.8% of revenue, which is well in line with both State Charter Board guidance and industry standards for affordability. (This calculation is made in year 2 numbers, since year 1 contains startup costs and lower occupancy costs—explained above—that are not representative of ongoing costs.)

Textbooks, instructional equipment, and supplies should really be considered as a combination of planning year and first operational year expenses. The startup grants and loans that span those two fiscal years will largely purchase the materials, supplies, and equipment that will be used by teachers in the first operational year. As mentioned above, about \$232,000 from grant and loan proceeds will be used to purchase materials, computers, and furniture that students and teachers ultimately use in the first operational year. The full enrollment budget therefore makes additional investment in these categories 280,000, while the contingency budget calls for only about half that amount. About 25% of that expense is ongoing and reflected in the second year operational budget. The remaining 75% is one-time in nature and won't be repeated for several years until a technology refresh and replacement texts are needed. This startup investment will provide the school with the tech infrastructure, instructional tools, and open-source curriculum materials needed to implement the school's program and achieve its mission as contained in this charter application.

Sports Performance Coaches have their own dedicated and ongoing supply budget (line 21.600) to provide each coach with the materials they need that classroom teachers don't have. This is a mission-specific expense that Athlos will always make.

Non-startup supplies (lines 10.600, 22.600, 24.600) that are used each year (copy paper, file folders, pens, staples, markers, and regular school supplies) total about \$32,000 and are ongoing.

Utilities and janitorial supplies are budget at \$20 per student for supplies and \$60,000 for utilities and are ongoing.

The budget includes repayment for the school's anticipated debt (see below), dues to join the state charter school association, and a place-holder amount for higher-than anticipated maintenance costs.

The budget includes no funding for a transportation program, which the school will not provide to students.

CONTINGENCY

Athlos' contingency budget protects key aspects of the mission and educational program, though at sometimes lower amounts consistent with the financial realities presented by low enrollment numbers. The contingency plan makes the following changes:

- Enrollment is only 75% of capacity. Local, State, and Federal revenue fall in line with actual enrollment as the laws affect each specific program.
- Administration also adjusts with enrollment, since the CMO's contract is based on per-student compensation. This luxury allows the school to continue to meet its compliance and administrative requirements at a lower cost that many non-CMO simply don't have the flexibility to do.
- The number of teachers falls in line with enrollment. Sections per grade are capped so that employment costs track with the number of students. During the enrollment period, new sections will be added when the move can be financially justified.
- HPE and Sports Performance faculty remain, though with one of the three of each being part-time, saving on wages and benefits costs.
- The number of paraprofessionals will be reduced, as will hours. There will be four Special Education aides, two general aides, and two Exceptional Child aides.
- The teacher bonus program will be delayed until enrollment can justify the expense.
- Janitorial hours will go down.
- Retirement benefits will fall as the school delays its implementation and reduces the "match" and reduces hours such that not as many employees will qualify.
- Health insurance premium support will fall slightly in year two as cost increases may be passed along to employees and more FTEs will be part-time and ineligible for school premium support.
- More professional development will be the responsibility of the CMO and/or shall be conducted remotely, saving on travel costs, but still protecting the important training in classically-based methodology
- Food services expenses will fall commensurate with enrollment.
- Occupancy expenses stay largely the same. Adjustments are made for occupancy costs that adjust with enrollment (supplies, water and utilities) but not for those that don't (lease, property tax.)

- Supplies budgets fall commensurate with enrollment, which is felt particularly in the first operational year, since so many dollars were already spent in the planning year. With fewer students, the school will need to purchase less to complement what it already bought with grant and loan funding.
- These plans still protect the school's unique program, though there will be some loss initially in having face-to-face interactions with trainers and partners as travel costs are pared back. Still, the school will invest its more limited resources in this scenario to put forward a quality program, while still building financial viability for the long-term.

DEBT

Athlos will use a developer to finance the construction and development of its facility, so no cost for debt service or for facility development is included in this plan. The debt and expense will all be borne by the developer. The school hopes that it will eventually be judged stable, viable, and of high enough quality to qualify for the issuance of tax-exempt bonds at a low rate to finance the purchase of a facility through the State Charter School Finance Authority. However, the timeframe for that is beyond the horizon presented here. When it has the financial history to justify such an investment, the school will only purchase its facility if the ongoing debt service on an annual basis lowers the cost from its lease, which is likely if the interest rate and investment environment is similar to the last five years.

The only debt the school plans to incur is the State Charter School Revolving Loan, which is available to Athlos to pay for startup expenses during the planning and first operational year. The school intends to borrow \$270,000 to provide additional financing (with the State Startup Grant) for the planning year and to acquire the necessary materials, technology, and equipment to begin school in 2016. The school has budgeted \$70,200 per year in debt service to repay this debt over the four year of repayment the program requires.

Policies and Procedures

The school's Board of Directors will adopt a comprehensive set of finance policies consistent with Utah Code. These policies cover use of funds, internal controls, purchasing, bank accounts, signatory authority, and every other aspect of financial management and are included with this charter application. Model Athlos Academies from around the country have robust financial policies that will be edited to be consistent with Utah law prior to the receipt of any public funding.

The school will comply with GAAP, undergo an audit each year consistent with its responsibilities as an LEA, and comply with all state laws regarding purchasing and accounting of all public funds, including those raised locally. Athlos and the CMO will ensure:

Segregation of duties so that multiple people are involved each time money changes hands to reduce the likelihood of fraud.



Oversight by regular internal (a board finance and audit committee) and external (an independent auditor consistent with Athlos' LEA status) methods

Internal review each month with a board finance and audit committee, which samples transactions for compliance with school finance policies

Transparency in budgeting and spending, with all transactions and budgets posted online as required by law

Competitive bidding for large projects to ensure fair treatment of all and best value for the school and taxpayers

Proper authorization, ensuring that all expenses are known and approved prior to incurring any expense so that authority to spend money is tied directly to accountability for the school's budget.

All payments made to the CMO or any individual or entity working for the CMO will be authorized by the Board Chair or Treasurer.

Protection of the school's assets with accurate inventory records, duplication of data, holdings spread across multiple banks, and insurance to indemnify employees, the board, and the school from tort claims

For example, the school will spend money on school supplies or classrooms. The procedure outlined below is similar to the procedures in all aspects of school finance, going from receiving money, spending money, and proper accounting of all aspects. (Please note how at least two parties and documentation are involved each time funds change hands.)

A parent comes to the school to donate to the school. The parent gives \$20 cash to the school secretary, who writes out a duplicate receipt, providing one copy to the parent. Money goes from the parent to the school, with two people involved (parent and secretary) with documentation (receipt) of the transaction viewed by both parties.

The secretary keeps an electronic log of all such transactions, and three times each week, prepares a deposit. All funds (cash or check) are counted and compared to the electronic log and the duplicate receipts. When totals match, the deposit is reviewed by another administrator for accuracy and initialed.

The secretary (or another administrator) takes the funds to the bank, where a receipt is collected that matches the amount on the school's internal records. Again, two people (bank teller and school administrator) are involved when funds change hands with documentation (receipt and deposit log) kept by both parties.

The secretary gives the deposit log and receipt to the CMO for input in the school's accounting system and for comparison to the bank's online records.

The CMO reconciles the account, noting that the bank statement agrees with the school's internal records. The CMO provides a copy of the reconciliation and original bank statement to the school's finance and audit committee.

EXPENSES

A coach determines a need to purchase athletic equipment for a performance. She searches online for the kind of equipment needed and compares prices, including one local vendor to potentially save on shipping costs. The coach completes a requisition form, signs it, and hands it to the school secretary, who provides it to the CMO.

The CMO reviews the purchase request, including the documentation on pricing and the rationale for the purchase, and signs approval for the item to be purchased, giving the form to the school secretary for potential purchase. (If the equipment is better purchased directly by the coach for the sake of expediency, step three will be skipped.)

The secretary places the order (along with other items from the same vendor), assigning it a purchase order number according to school policy.

When the equipment arrives with a packing slip (prepared by the vendor), the school secretary or the coach will count the items, compare for accuracy to the original order and packing slip, and initial for accuracy or call the vendor in the case of inaccuracy.

Initialed packing slip (or invoice) will be attached to the original purchase order (or requisition form, if the teacher purchases directly) and submitted to the CMO for payment.

CMO will review all paperwork for accuracy, authorization, and compliance with school policy, and then prepare a check made to the vendor (or coach, in case of reimbursement), attaching it to the supporting paperwork and giving all documentation to an authorized signer.

The authorized signer reviews all paperwork, including the check, comparing for accuracy and policy compliance throughout, and signs the check, returning all paperwork to the school secretary for disbursement.

Secretary mails the check to the vendor (or gives the check to the coach).

The check clears the bank, and the CMO notes such as it reconciles accounts, providing a copy of the reconciliation, bank statement, and complete finance reports for review by the finance and audit committee.

The school's CMO will be charged with carrying out the day-to-day management of the school's finances consistently with these principles. The CMO will ensure that the school's assets (cash,

buildings, and equipment) are adequately documented and protected, that school finance policy and state law are followed in all transactions, and that student enrollment records are accurate and reported to the state daily.

The CMO will be responsible to submit comprehensive Annual Financial Reports to the board, the State Office of Education, and the State Auditor's office as required by law. In all aspects, the CMO will adhere to Generally Accepted Accounting Practices, state law, and the board-adopted finance policies. If necessary, the Board of Directors will provide external training and oversight to ensure that GAAP is fully in place upon the receipt of any public funds (including funds donated to Athlos Academy of Utah from private sources). Additionally, the CMO will work with the Board of Directors and the school's insurance brokerage to ensure that the school is properly insured, that grants and all restricted streams of funding are properly administered according to each source's guidelines, and that the school meets all other key financial obligations that are part of any state law or rule now in place or that may be in place in the future. The CMO and a school representative will attend semi-annual finance training to stay abreast of changes in state law regarding school finance.

In all of these oversight and managerial tasks, the CMO will be supported by the two school secretaries, one of whom will have specific responsibility to manage student records and will carry the additional title of Registrar. (See Roles and Responsibilities subsection of Section 7: Staffing for day-to-day description of duties.) The designation of a single person to serve as registrar also will ensure that the school has the capacity to develop adequate policies and processes for tracking enrollment and attendance eligibility, eligibility for free and reduced priced lunch, students with disabilities and ELL enrollment. The registrar will submit data to the state and the school Director regularly to ensure that records are accurate.

Financial and student records will be stored in both paper and electronic formats. Paper records will be stored in fire-proof filing cabinets that lock to protect the records' integrity and security. Electronic records will be stored in the school's Student Information System (enrollment and student records) and in the Financial Information System (financial records). Both systems will be backed up to an off-site storage server regularly to ensure that they are maintained in emergencies or after any disaster or crime.

Facility

Athlos Academy of Utah will partner with The Charter School Fund to secure a facility. The building will be based on that of other Athlos schools. Athlos works with The Charter School Fund to finance the building, which is then leased back to the school, with a purchase option. The Charter School Fund knows that ultimate ownership of the facility is in the best interest of the school, and is the only viable long term solution. The Board of Directors understands facility costs should not exceed 22% of the budget, and will secure the services of a competent real estate attorney to advise the Board of Directors in regard to a facility lease. The Board of Directors will work to negotiate the best possible lease and buyout terms for the school from The Charter School Fund. The Charter School Fund has previously financed and



constructed schools in Utah and is aware of the conditions set on facility costs. It is their mission to provide quality facilities at reasonable prices for charter schools.

The Athlos model has specific programmatic requirements that are not often found in existing structures. In the proposed area Athlos Academy of Utah was unable to locate a building with these requirements, because of this it will require the construction of a new facility. With this construction, the Board of Directors will monitor and ensure all applicable health, safety, and occupancy requirements are met. The budget created for this application reflects the estimated lease cost for the building, which should be very accurate since the facility is being replicated and current market conditions have been taken into account.

The Board of Directors will select a board building officer who will be responsible for the oversight of permitting, construction, and compliance with USOE reporting requirements. The Board of Directors acknowledges the timeline to construct a building to open in 2015 is aggressive, but The Charter School Fund has previously delivered facilities in Utah under the same timeframe.

The building plans are already in place, making the permitting and construction phase significantly shorter. Building specifications are as follows:

Total building size at approximately 90,000 square feet, including:

162 parking spaces
10 bicycle spaces
30 classrooms
30 classrooms
1 cafeteria
1 kitchen
20 single restrooms
2 galley restrooms

Specialty Classrooms:

2 science rooms
3 special education rooms
1 art room
1 media room
1 music room
1 library/media center

Admin Space:

9 offices
7 storage/janitor rooms
1 workroom

1 teacher lounge/work room
1 nurse room

Gym/Auditorium/Outside Space:

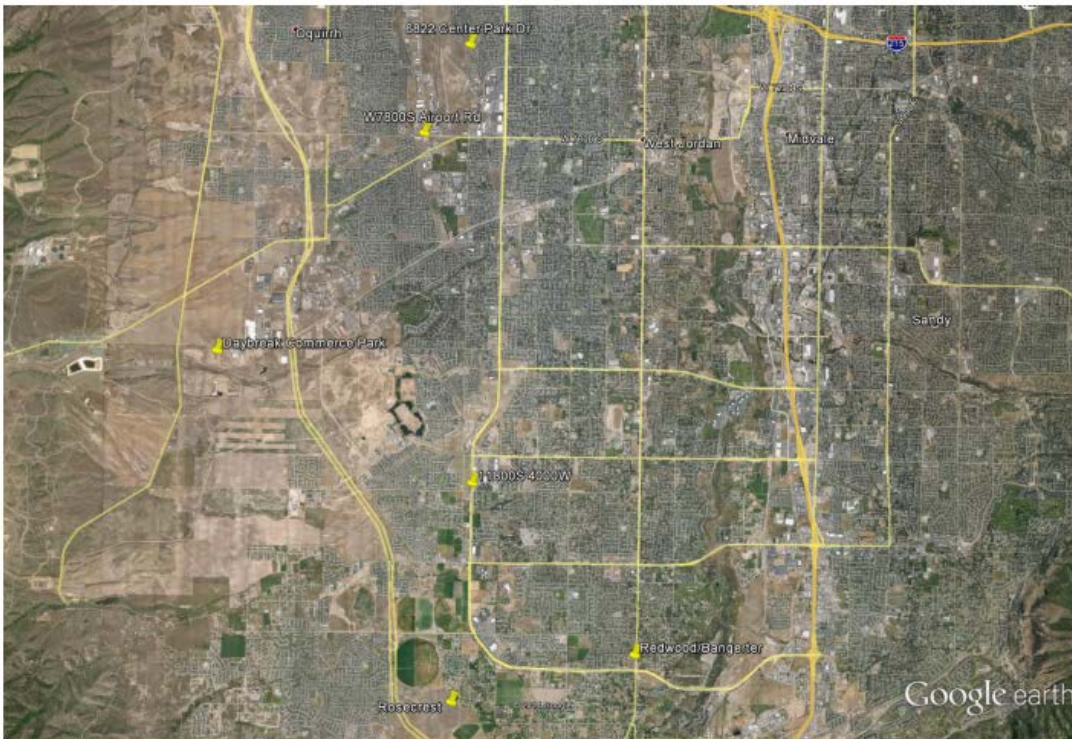
1 gym with hardwood floors and bleachers
1 athletic training room with indoor turf
1 weight training space
2 locker rooms at 191
1 soccer field (high school size);
1 football field (NCAA size);
1 baseball field (MLB size); and
2 basketball courts (with cross court hoops).

Playgrounds:

1 play structure (for grades K-3);
1 play structure (for grades 4-8);
Four square courts;
Tetherball courts;
Swing set (3 bay); and
1 stage (and stage area)



Athlos Academies has identified five pieces of land which would accommodate the facility within the Jordan School District, as illustrated by yellow pins on the map below. Athlos Academies' development arm has begun preliminary purchase possibilities with landowners.



Opening Timeline

Athlos' partner and CMO has opened schools in several states under this model, so the school already has the expertise and experience it needs to successfully open school in a completed facility in the available time. The CMO has experience with developers, curriculum providers, state government agencies, and all aspects of school startup. It has engaged local parties with additional experience in Utah's school construction and school finance climates.

The fact that Athlos has a lot of experience doesn't lessen at all the amount of work to be done, but it does make that work faster to accomplish, as the school won't have to bring in people who are unfamiliar with the process of starting this model in this state.

If the State Charter School Board approves Athlos Academy of Utah with a waiver to open in the fall of 2015, Athlos Academies will begin working to secure land and obtain preliminary approvals and permits from the local municipality so that when final approval is issued by the State Board of Education construction can begin. If a waiver is not granted, the following timeline will apply.

April 2015—Final Charter Approval

May 2015—Enter into an agreement with an Athlos Academies development arm The Charter School Fund by the end of the month to construct the building
May-June 2015—Determine exact location and developer will begin process of land acquisition
June-August 2015—Facility design
August 2015—Property acquisition complete
August-September 2015—Permitting
October 2015-July 2016—Construction
August 2016—Athlos Academy of Utah occupies building

Marketing, staff recruitment, and hiring will commence immediately upon approval from the State Board of Education, and the Board of Directors will finalize and sign the operational agreement with Athlos Academies. Upon receipt of the agreement, Athlos Academies will mobilize appropriate staff and resources to ensure a smooth and successful opening.

The following timeline will be condensed if the school is granted a waiver. If an opening date of 2016 is approved, tasks will be done according to the following schedule.

In the first six months after the charter is approved, the CMO, under direction of the school's board, will undertake the following activities in the timeline specified:

Spring—apply for startup grants and loans

Spring—Open bank accounts

Spring—Update school's website with approval information, enrollment timelines and database, and post required information and disclosures

Spring—Issue RFP for facilities and by early summer, select a development partner

Spring—apply for tax exempt status with the IRS and establish state tax ID numbers

Spring—Adopt and submit a startup and planning year budget

Summer—Begin enrollment and marketing campaign, collect student and family information on website

Summer—Begin attending Directors' meeting and submitting monthly financial reports

Summer—Finalize facility plans consistent with approved budget

Fall—Begin purchasing furniture and fixtures

Fall—Begin designing curriculum and training programs, identifying publishers, authors, and project models for purchase

Fall—Draft policy manual based on legal requirements, state guidance and templates, and resources available through other resources and existing schools

Winter—Begin construction on facility

Winter--Establish volunteer committees from among registered and interested families

Winter—Attend lunch program and student information systems training and begin putting such programs in place

Winter—Begin formal enrollment procedures according to policy



Winter—Hire Director and support staff according to approved grant and loan budgets

Winter—Arrange for lunch provided by a local school district or charter school

Spring—Establish payroll and benefit programs to have in place when employees begin work in the summer

Spring—Purchase textbooks and curriculum

Spring—Install network infrastructure in the school

Spring—Begin recruiting and hiring a full faculty and staff according to the plan above

Spring—Arrange for professional development to take place prior to school beginning

Summer—Purchase regular school supplies and materials

Summer—Engage student service providers for special education

This timeline does not list all meetings that the CMO, board members or support staff will attend. The timing, frequency, and location of these meetings are not known. However, the school Director or his designee will attend state- and mentor-provided trainings in:

- Student Information Systems and requirements
- Teacher licensure requirements and CACTUS
- Special Education
- Title I
- School Lunch
- Charter Directors' meetings
- Utah Consolidated Application
- Assessment and accreditation
- Other required meetings

The school's plan also calls for flexibility. Over time, the charter school industry learns from experience how to do things better. Athlos anticipates that in the two years between the submission of this application and the start of school, new state systems may be in place than exist today. New training programs will be available. New resources can be shared. New experts will emerge. Athlos will take advantage of these in helping the school to successfully plan and open school.

Athlos knows this plan will succeed because it has already succeeded in several states across the country. Utah has some unique aspects to its charter environment, but with good planning and the right experience, Athlos will be available to open successfully and on time, and operate the program consistent with this charter to meet the state's performance standards as well as the board's internal goals for academic performance and school operation.

The complete Athlos Academies start-up timeline is included here.

► Phase 1: Immediately after Receiving Charter: January

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Board Governance	Hire Principal	Board of Directors	Board Chair		February
	Join charter school association	Board of Directors	Board Chair		February
	Design a board training schedule to include immediate needs and annual needs, including open meetings act, committee development, and policy development	Board of Directors	Board Chair		February
	Finalize contractual agreements with Athlos Academy of Utah	Board of Directors	Board Chair, Principal, Athlos Academies		February
	Complete all necessary funding paperwork	Principal	Business Management Provider		February
	Make initial board committee assignments (finance, resource, executive, facilities).	Board of Directors	Board Chair		February
	Obtain Board Liability Insurance	Board of Directors	Business Manager		February
Enrollment/ Lottery	Finalize formatting for enrollment and registration paperwork and online forms, evaluate for compliance, and translate into Spanish. Activate.	Principal	Principal		February
Facilities	Secure land and permits and begin construction	Facilities Committee	Principal Athlos Academies		February
Fiscal Management	Contract for Business Management Services	Board Treasurer	Board Chair, Principal, Athlos		February

	(accounting, payroll, reporting, etc.)		Academies		
	Contact the IRS about the school's approval and file 501(c)3 application	Board Treasurer	Business Management Provider		February
Human Resources	Begin recruiting faculty	Principal	Principal		February
Marketing and PR	Begin Marketing Campaign (website, public meetings,	Board of Directors	Principal Athlos Academies		February

► **Phase 2: 6 to 9 Months before Opening: February –March**

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Board Governance	Create a calendar of external deadlines (reports, funding, etc.)	Principal	Principal		March
	Schedule Board Meetings for upcoming school year; finalize meeting minutes and agenda formats, draft officer responsibilities and committee descriptions. Develop a calendar of annual Board reviews (approving budgets, calendars, reviewing student achievement data, etc.).	Board of Directors and Principal	Board Chair	January	March
	Begin an internal evaluation of board bylaws, student handbook, and safety and emergency procedures to ensure compliance with all federal and state requirements and best practices. Draft any additional policies.	Principal and Board President	Principal	January	March
	Monitor Administration and Provide Support	Board of Directors	Board Chair		Ongoing

	Develop School Calendar and Daily Schedule, vote to adopt and post on website.	Administration and Board	Principal		March
	Evaluate and purchase (if necessary) student data collection system (such as Jump rope or Open SIS) and online parent communication system (such as SchoolSpeak). Make recommendations for Board vote by April.	Administration and Board	Principal		March
Enrollment/Lottery	Develop procedures, post and launch enrollment process.	Board of Directors	Board Chair and Principal		February
	Continuously monitor enrollment	Principal and Athlos Academies	Principal		Ongoing
Facilities	Continue working with Athlos Academies, ensure that bidding process is appropriate, permits are secured, and any city approvals happen on time.	Board Facilities Committee Chair	Principal Athlos Academies		Ongoing
Fiscal Management	Work with the Fiscal Services Contractor to ensure all accounts are prepared.	Board Treasurer	Board Treasurer		Ongoing
	Ensure that start-up budgets are on schedule	Board Treasurer	Board Treasurer		Ongoing
	Secure insurance policies (workers comp, liability, etc.)	Board Treasurer	Business Manager		March
	Review and finalize financial tracking methods school will use to ensure operational finances.	Fiscal Contractor and Principal	Principal		March
	Adopt formal signature policies, finalize financial reporting templates, P.O. forms and policies, and define investments and saving strategies	Fiscal Contractor and Principal			February
	Establish payroll and develop cash flow plan	Fiscal Contractor and Principal			February

Fundraising	Research and apply for grants	Board of Directors	Resource Committee Chair/Principal		Ongoing
Human Resources	Design a secure and efficient system of data maintenance for in-house developed and confidential documents (physical records, enrollment and registration paperwork, personnel records, and key school documents)	Principal and Office Manager	Principal		March
	Finalize salary schedule, benefits package, and interview process, including appointing an ad hoc hiring committee	Board Treasurer, Administrator and Fiscal Contractor	Principal		February
	Develop form letters for enrollment and hiring processes, and ensure that employee contracts meet state requirements	Office Manager and Principal	Principal		February
	Review and Finalize Employee Handbook, board must vote to adopt.	Principal and Office Manager	Principal		March
	Negotiate and sign contracted services (lawn care, cleaning, security, etc.)	Principal	Principal		March
	Set up non-profit mailing status with post office	Office Manager	Principal		February
	Attend Teacher recruitment fairs and post and fill all open positions.	Hiring Committee	Principal		March
Marketing	Host monthly information meetings on site; work with Athlos Academies to make additional marketing push based on analysis of enrollment data.	Principal, Athlos Academies	Principal	February	Ongoing
Other	Finalize academic curriculum choices and begin purchasing materials. (Math, Language Arts, and Core	Principal and Fiscal Contractor	Principal		March

	Knowledge)				
	Begin ordering furniture	Principal and Fiscal Contractor	Principal		March
	Develop IT 5-year Plan and bid services and equipment.	Principal	Principal		March

► Phase 3: 3 to 6 Months before Opening: April – June

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Board Governance	Develop Administrator Evaluation Process	Board of Directors	Board Chair		June
	Retain legal counsel	Board of Directors	Board Chair		June
	Perform lottery according to advertised timeline.	Board of Directors	Board Chair		May
	Attend State Provided Board Governance Training	Board of Directors	Board Chair		April
	Determine Preference List	Board of Directors and Principal	Principal		May
	Approve school calendar	Principal	Principal		May 15 th
Enrollment/Lottery	Continue enrolling students if there is room, otherwise establish wait list.	Principal and Office Manager	Office Manager		Ongoing
	Issue and process enrollment paperwork	Office Manager	Office Manager		Ongoing
Facilities	Continue progress on facilities	Athlos Academies, Board of Directors and Administration	Principal		Ongoing
Fiscal Management	Complete contracts for all contracted services	Principal and Fiscal	Principal		May

	(food service, special education, IT, SIS, etc.)	Contractor			
	Start-up loan and grant applications submitted to USOE	Principal and Fiscal Contractor	Business Manager		Approximately Jun 1 st .
	Secure IT services and Telecommunication services (review for state/federal compliance)	Finance Committee and Principal	Principal		May
Fundraising	Continue researching and applying for applicable grants.	Board of Directors	Resource Committee Chair		Ongoing
	Identify a PTO president, begin organizing meetings (Resource Committee Chair is liaison to PTO) and outline an annual fundraiser (approved by board)	Board of Directors	Resource Committee Chair		May
Human Resources	Complete hiring of faculty and staff, ensure all new-hire paperwork is signed, and all personnel files are complete (including teacher certification documentation and background checks)	Business Manger	Principal		Optimistically, May
	Hire office staff	Principal	Principal		May
	Set up the OpensSIS system for the school, including uploading all registration data, and preparing for state reports.				June
	Arrange for office staff to attend appropriate state trainings to ensure that student and teacher data is properly reported	Principal and Office Manager	Principal and Office Manager		June
	Develop Attendance reporting system, ensure teachers are trained.	Principal and Office Manger	Principal		June
	Develop safety procedures to track visitors and adopt a system to track volunteer hours.	Office Manager	Principal		June

Marketing and Recruitment	Continue implementing marketing in conjunction with Athlos Academies	Principal	Principal and Athlos Academies		Ongoing
Other	Place all orders for materials and furniture no later than early July.	Principal and Fiscal Contractor	Principal		June
	Search for used or donated furniture	Board Resource Committee and PTO President	Resource Committee Chair		June

► Phase 4: 0 to 3 Months before Opening: July-August

Category	Task	Responsible Parties	Contacts or Resources	Start By (date)	Complete By (date)
Board Governance	Hold Public Budget hearing	Board of Directors	Board Chair		July
Enrollment/Lottery	Continue updating waitlist and enrolling students as space allows; process all registration paperwork all the way to input into Open SIS.	Office Manager	Office Manager		Ongoing
	Verify that all immunization records are in place and that all student records are complete.	Office Manager	Office Manager		Ongoing
	Ensure that all Special Education files have been received and set up parent meetings prior to school opening.	Special Education Director	Special Education Director		August
	Develop internet, technology, and library usage agreements and send these to parents for electronic signatures prior to back to school night. Have hard copies on hand for this event.	Office Manager	Office Manager		July
Facilities	Pass final inspections and receive occupancy certificate	Facilities committee	Athlos Academies		July

	Ensure all appropriate insurance policies are in place.	Facilities Committee	Principal		July
	Lease or purchase office equipment (copy/fax machines, etc.)	Principal	Principal		July
	Arrange for volunteer “moving day” event	PTO and Principal	Principal		August
	Receive all equipment and supplies, ensure that all items are inventoried and checked out to teachers or classrooms.	Office Manager	Office manager		July/August
	Set up classrooms, office equipment, and ensure adequate supplies are in place for first day of school	Office Manager, Teachers, Principal	Principal		August
	Post emergency evacuation plan maps in all appropriate places and ensure that all inspections are complete.	Office Manager	Office Manager		August
	Ensure all required laws are posted as required throughout the building (MSDS, OSHA, etc.).	Principal and Office Manager	Office Manager		August
	Conduct a safety review of grounds. Ensure all equipment is working properly (HVAC, Fire Safety, and Sprinkler System)	Principal	Principal		August
Fiscal Management	Enroll all employees in appropriate benefits, including health, life, SS, Unemployment, and PERSI	Fiscal Contractor	Principal		August
	Verify all Paraprofessional records, background checks, personnel files, training schedules, etc.	Fiscal Contractor	Principal		August
	Ensure that payment and donation systems (online and office) are in place (and prepared for BTS night rush). Verify that student fees for middle school are in compliance and sent to parents.	Fiscal Contractor and Principal	Principal		August

	Review budget and ensure that everything is on track.	Fiscal Contractor and Principal	Fiscal Contractor and Principal		Ongoing
	Develop a plan backwards from end of year audits.	Fiscal Contractor and Principal	Fiscal Contractor and Principal		July
Fundraising	Develop a fund development strategy	Board of Directors	Resource Committee Chair		Ongoing
	Begin planning the annual family fundraiser (spaghetti dinner or carnival, etc.)	PTO, Resource Committee Chair	Resource Committee Chair		August
Marketing and PR	Hold a ribbon Cutting ceremony for community	Board of Directors	Board Chair		August
	Organize a school open house/recruitment event.	Principal PTO	Principal		August
Other	Organize Back to School Night - maps of building, homerooms posted on walls, in classrooms meet teachers and complete paperwork	Principal and PTO			August
	Professional Development – emergency preparedness training, including fire, lockdown, natural disaster, school closure due to weather, and first aid training/resources	Principal	Principal		August
	Professional Development - Ensure all staff/faculty know visitor procedures and are properly trained on phone/intercom system.	Office Manager	Office Manager		August
	Professional Development – ensure that Core Knowledge sequence has been refined into units and lessons and that staff have participated in appropriate CK training (webinar and off-site session) Lessons should be developed down to the daily level for the first quarter.	Principal	Principal		August

	Professional Development - Ensure that staff is trained in school's chosen math and language arts programs. And those lessons are developed down to daily lesson plans for the first quarter. Also online grading and attendance systems and school cultural expectations.	Principal	Principal		August
	Materials Distribution – Ensure that all materials have been received and inventories and distribute to teachers.	Principal and Office Manager	Principal and Office Manager		August
	Student Services – Special Education Director, 504 Coordinator, and School Counselor review student files and ensure that all paperwork is received, all forms are developed and approved by administration and that teachers are trained on providing appropriate services to their students.	Special Education Director, 504 Coordinator, School Counselor	Principal		August
	ELL coordinator (stipended teacher) reviews files to ensure that paperwork is present, and meet with families to begin process.	ELL Coordinator			August
	Develop Student and Parent orientation modules to be delivered electronically and in person – navigating grading systems, understanding the Athlos Model, etc.	Lead Teacher and Principal	Lead Teacher and Principal		August
	Work with Faculty to set action plan benchmarks for the academic goals identified in Charter.	Principal	Principal		August
	Review overall assessment benchmarks, strategy, and timeline. Ensure that all staff is trained and that sufficient time is allotted for teacher PLC work sessions to analyze student data on a regular basis.	Principal	Principal		August

Section 9: Education Service Providers

We intend to contract with an education service provider.

Services

Athlos Academy of Utah will contract all school management services out through Athlos Academies. The Board of Directors has researched the Athlos Academies thoroughly, and finds it to be a solid program, providing students with a unique blend of academic knowledge and athletic skill while developing character that will equip students to succeed in life.

Athlos Academies can provide Athlos Academy of Utah with the program fidelity necessary to achieve desired results and has the capacity to run the school as it has been laid out in this application.

Selection

Athlos Academy of Utah has found Athlos Academies to be a sole-source provider of the Athlos Athletic Curriculum and overall Athlos program, as defined by the State Purchasing and Procurement Code as found in Administrative Rules Section R33. If for some reason, Athlos Academy of Utah should need to select another ESP for any reason, proper procedure will be followed as found in current Utah code.

Accountability

Accountability with Athlos Academies will be based on a variety of measures, including student growth and achievement on standardized assessment, stakeholder satisfaction surveys, administrative performance, performance and adherence to the SCSB Performance Framework, results of the school's annual audit, the timely submission of all reports and compliance with all state and federal mandates. Each month, the ESP will report to the Board of Directors on the status of reports and requirements, academic progress, finances, and progress towards established goals. The school will ensure that any agreement with any ESP will contain a provision for termination by the school so that incentives for high performance will always be in place and that the school can hold the ESP accountable with the ultimate threat of terminating services.

Roles and Responsibilities

The Board of Directors of Athlos Academy of Utah has decided to utilize Athlos, and educational management organization (EMO), to administer the school program. The school principal will be an employee of the EMO, but will be hired in conjunction and in agreement with the Board of Directors. All other employees will be employed by the school directly, and will be hired by the Director in conjunction with Board of Directors representation. The principal will oversee

all operational management in conjunction with Athlos. The Board of Directors will monitor academic progress, financial solvency, adherence to and accomplishment of the mission and vision of the charter, and evaluate performance of the principal in the context of overall ESP performance. If Athlos (EMO) is not performing adequately, the school may put an intervention plan in place, and/or make modifications to the management contract in order to increase performance.

Appendix A: Waiver Requests

Athlos Academy of Utah is seeking a waiver from R277-482 in order to open in August 2015.



Appendix B: ESP Contract

Athlos Academy of Utah will negotiate an operating agreement with Athlos Academies to manage the school and provide a facility.

MASTER SCHOOL SERVICES AGREEMENT

THIS MASTER SCHOOL SERVICES AGREEMENT (this “**Agreement**”) is made as of this _____ day of _____, 20____, by and between School Model Support LLC, an Idaho limited liability organization (“**Provider**”), and _____, a Nevada non-profit corporation (“**Organization**”).

WITNESSETH:

WHEREAS, upon approval of Organization’s application for a charter school approval, Organization will enter into a contract with **[insert entity]** to operate a Nevada open-enrollment charter school at each of the school locations (each a “**School**”) authorized by **[insert entity]** (each, a “**Charter**”);

WHEREAS, Provider owns an educational concept and program called "Athlos Academy" that provides school opening and ongoing support service character education, and health and fitness programs to schools across the United States and as part of this educational concept, Provider has entered into agreements with various outside parties to provide content, services and value to the Athlos Academy (the “**Outside Vendors**”) to provide, among other things, physical education programs and sport-related products and other services and material;

WHEREAS, Organization desires to obtain Provider’s services in connection with the Organization’s operation of the school authorized by the Charter pursuant to the terms hereof and Provider is able and willing to provide the services as hereinafter set forth;

WHEREAS, Organization and The Charter School Fund LLC (an affiliate of Organization) intend to enter into a development agreement to provide permanent facilities for Organization’s schools and such schools shall utilize the Athlos Academy educational concept;

WHEREAS, concurrently herewith Provider and Organization have entered into that certain Trademark License Agreement which provides the schools the right to use the name and logo in its physical education and after-school physical education programs;

WHEREAS, the Organization and Provider acknowledge and agree that, in accordance with Applicable Law (as defined below), the Board of Directors of the Organization (the “**Board**”) has the primary responsibility and ultimate authority for the operations of the School, is the governing authority of the School, and may carry out any act and ensure the performance of any function that is in compliance with the Charter, any policy statements and guidance issued by the Nevada Department of Education; the Nevada Constitution; the Individuals with Disabilities in Education Act; the Family Educational Rights and Privacy Act; and other applicable federal, state or local statutes, ordinances, and regulations; any amendments to or recodification of the aforementioned laws; implementing regulations of such laws; executive orders; common law; and other guidelines, policy statements, and rulings applicable to Nevada public charter schools (collectively, “**Applicable Law**”); and

WHEREAS, Organization and Provider agree that Provider will provide those professional, consultative, and support services described herein as permitted by and in accordance with the Charter and Applicable Law.

NOW, THEREFORE, in consideration of the covenants and agreements of the parties herein contained and of the fees to be paid to Provider as hereinafter set forth, and for other good and valuable consideration the sufficiency of which is hereby acknowledged, Organization and Provider (together, the "**Parties**" and each a "**party**"), do hereby agree on behalf of themselves and their respective legal successors and assigns, as follows:

1. ENGAGEMENT. Organization hereby engages Provider on the terms and conditions hereinafter set forth to provide the Services (as defined below) and Provider hereby agrees to provide the Services to Organization pursuant to the terms hereof.

2. SITE IDENTIFICATION. Upon Organization's identification of a new school site (the "**School**"), an addendum shall be prepared identifying the location and term commencement and expiration date in the form attached hereto as Exhibit A and incorporated herein by this reference.

3. TERM. Organization agrees that so long it holds a Charter for a School, Organization shall engage Provider for the Services (defined in Section 5 below), pursuant to the terms and conditions of this Agreement.

4. DUTIES OF PROVIDER. Provider shall provide the following services (collectively, the "**Services**"):

assistance with the preparation of a charter application for a School, as requested by Organization;

employment of the School's chief executive officer;

marketing support for various marketing campaigns for the purpose of student enrollment at a School as requested by Organization;

consultation on the review of materials for various marketing campaigns for the purpose of student enrollment and retention at a School, as requested by Organization;

assistance with preparation for any future expansion of the School to accommodate growth of the School, pursuant to terms and conditions acceptable to Organization and Provider;

assistance with the recruitment of key employees, as requested by Organization; provided, however, with respect to any personnel decisions, the Board of Directors shall select all School officers employed by the School, and the Board of Directors shall retain all authority with respect to School personnel, including, without limitation, the authority to determine whether any person is to be employed by the School, and whether any person has the appropriate qualifications for employment; to determine employee compensation, and to determine whether an employee shall be disciplined or dismissed by the School;

assistance with the recruitment of candidates for the sports performance program; however any final decisions to hire and retain candidates shall be made by the Board;

coordinate professional development training for certain employees of the Organization, as requested by Organization;

assist with textbook, educational material and curriculum selection, as requested by Organization;

initial, and ongoing, training to Organization personnel with respect to the athletic curriculum, the character development curriculum, physical education program and other programs which are provided by Provider;

athletic curriculum and character development curriculum (collectively, the “**Athlos Curriculum**”) for use by the coaches and other school personnel;

professional development tools and materials for the Athlos Curriculum;

athletic curriculum fixtures and equipment (excludes sport specific and traditional physical education equipment);

assist Organization with the set up and launch of the initial athletic after school program (if adopted by the School) and providing guidance as requested;

assist Organization with a student performance assessment plan, as requested by Organization;

assist with teacher and principal support and development, as requested by Organization;

assist with professional learning community implementation, as requested by Organization;

assist in the development and refinement of school support forms relating to school function (such as enrollment forms, parent surveys, staff evaluation forms, and other office forms), as requested by Organization;

assist Organization to develop the School’s website;

assist Organization to provide the School with the domain for its email addresses;

provide the use of Athlos related electronic function(s) and service(s) (i.e. smartphone application, etc.);

provide approved Athlos school uniforms for sale/distribution to students;

provide approved Athlos gym wear for sale/distribution to students;

provide business contacts that may permit the Organization preferred access to sports products, apparel and equipment with industry leading brands; and

provide the back-office and accounting services, including payroll, accounts receivable, accounts payable, and other necessary accounting functions; provided, however, Provider shall provide full disclosure and access to such records as Organization may reasonably require.

A list of the typically required equipment for the Athlos Curriculum is on Schedule 1, attached hereto. The equipment is split between what Organization is responsible for purchasing and

what Provider is responsible for purchasing for the Athlos Curriculum. Subject to Provider's approval, on a case-by-case basis, Provider will purchase Organization's equipment. This depends upon the Organization's approval, election and execution of a Promissory Note like the form attached hereto as Schedule 2. Provider and Organization agree that payments on the Promissory Note will commence one month after school opening, and shall have a Maturity Date of no longer than twelve (12) months following the first due payment.

6. TERMINATION. Organization may terminate the Services at a School for cause by providing ninety (90) days' notice to Provider, provided the Provider fails to cure the breach or default within such 90-day period, or such longer period as may be necessary to cure the breach or default, if Provider has commenced and is pursuing a cure. "Cause" shall include, but not necessarily be limited to breach or default by Provider to provide the Services in a manner sufficient for Organization to operate the School in compliance with the terms and conditions of this Agreement.

(a) Termination by Provider. This Agreement may be terminated by Provider, in the event that Organization defaults in the performance of any material obligation hereunder, and fails to cure such default within thirty (30) days of the date of written notice from Provider. "**Material obligation**," for the purpose of this provision, means that Provider determines that (i) Organization has failed to pay amounts due under this Agreement; or (ii) Organization has not otherwise complied with its obligations under this Agreement.

In order to effectively implement the Athlos Curriculum, Provider will supply training and make periodic visits to assist the School with the implementation of the program. As a part of such training, Provider will make periodic written summaries relating to suggestions of improvement. Provider understands and acknowledges that the Board of Directors has final authority over the delivery of any curriculum utilized in a School. However, if Provider's assessments reveal (in Provider's discretion) that the Athlos Curriculum is being delivered in a way that is causing detriment to, and/or the dilution of, Provider's brand and reputation, Provider may terminate this Agreement with a ninety (90) day notice to Organization. The notice shall trigger provisions of Section 6(e) below for that particular School.

(b) Termination upon Loss of Charter. If the State (i) revokes, does not renew, or materially changes a Charter, or (ii) Organization has been informed in writing that a Charter will be revoked or will not be renewed; or (iii) Organization is no longer funded by the State of Nevada or the funding from the State of Nevada has been reduced to an amount whereby Organization is unable to meet its obligations under this Agreement, then either Party may, upon thirty (30) days written notice terminate this Agreement as to the affected terminated School(s) without penalty, further obligation or liability of any kind to either Party. The event shall trigger provisions of Section 6(e) below for that particular School.

(c) Termination by Mutual Consent. This Agreement may be terminated by the mutual written consent of both Parties without penalty. Such termination shall be effective at such time, and upon such other terms as set forth in the written consent. Except as otherwise agreed by the Parties in writing, termination does not relieve Organization of any obligations for payments outstanding to Provider as of the date of termination. Other obligations of either Party may specifically continue and survive termination as provided in this Agreement.

(d) Trademark Termination. Any termination for Services at a School shall result in a termination of the Trademark License Agreement for such School.



(e) Removal of Program. Upon a termination as provided herein, or where the term is not subsequently extended by Organization, Organization shall:

remove Provider's trademark and usage of the name Athlos Academy (or approved variation) from the School, its trade dress and materials;

remove any reference to the Outside Vendors;

eliminate all Outside Vendor program(s) (if implemented);

cease using the Athlos Curriculum and related professional development tools/materials, or any similar form thereof;

return the fixtures and equipment for the athletic curriculum (Schedule 1) to Provider;

forfeit use of Athlos-related website;

forfeit use of Athlos-related domain name;

forfeit use of all Athlos-related electronic functions and/or services;

forfeit access to business partnership discounts;

return all marketing-related materials to Provider;

terminate use of Athlos school uniforms and gym uniforms;

submit to compliance verification audit sixty (60) days following termination; and

submit to compliance verification audit ninety (90) days following termination.

Organization shall comply with the above no later than ninety (90) days after the other Party's receipt of such notice of termination.

7. SERVICES FEE. In consideration for the Services, Provider shall receive a monthly "Services Fee" equal to twelve percent (12%) of local, state and federal gross revenues of Organization (excluding revenues from reimbursement programs such as free and reduced meals) for such month. Payment shall be determined in accordance with United States generally accepted accounting principles which are consistently applied. The Parties hereto acknowledge and agree that as of the date of this Agreement, the Services Fee payable to Provider is reasonable, necessary and fair market value compensation for services rendered; and upon payment of the fee to Provider, those revenues become the sole property of Provider and are no longer Nevada public funds.

The Services Fee shall be payable monthly in arrears on the last day of the following calendar month. For example, payment for the month of September shall be due no later than October 31st. Organization agrees that any payments received after the due date shall include a five percent (5%) late fee assessment.

The Services Fee is the only compensation or other payments, independent of any Promissory Note as previously discussed, to which Provider will be entitled hereunder. Provider shall be



responsible for all of its own costs and expenses necessary to fulfill its obligations under this Agreement, including, but not limited to, compensation, travel expenses, and other benefits payable to any Provider employees.

Notwithstanding the foregoing, prior to the commencement of the Term for a School, if Organization desires to utilize Provider's employees for any purposes that involve travel, Organization shall provide and/or reimburse the following: (a) airfare, (b) lodging expenses, (c) car rental expenses, and (d) daily meal expenses.

8. NOTICES. All notices given pursuant to this Agreement shall be in writing and shall be given by personal service, by facsimile, by United States Mail or by United States Express Mail or other established express delivery service (such as Federal Express) or by certified mail, postage or delivery charge prepaid, return receipt requested, addressed to the appropriate Party at the address set forth below:

If to Provider: School Model Support LLC
855 W. Broad Street, #300
Boise, Idaho 83702-7153
ATTN: Legal Department
Phone: (208) 908-5541
Fax: (208) 376-8523

If to Organization: _____

ATTN: _____
Phone: _____
Fax: _____

The person and address to which notices are to be given may be changed at any time by any Party upon written notice to the other Party. All notices given shall be deemed given upon receipt; and

For the purpose of this Agreement, the term "receipt" shall mean the earlier of any of the following: (i) the date of delivery of the notice or other document to the address specified above as shown on the return receipt and/or facsimile confirmation, (ii) the date of actual receipt of the notice or other document by the person or entity specified above, or (iii) in the case of refusal to accept delivery or inability to deliver the notice or other document, the earlier of (A) the date of the attempted delivery or refusal to accept delivery, (B) the date of the postmark on the return receipt, or (C) the date of receipt of notice of refusal or notice of non-delivery by the sending Party.

9. NON-DISCLOSURE/NON-COMPETITION. Organization agrees to treat this Agreement confidentially and shall not disclose the terms contained herein. In the event of a breach, Organization understands that such breach may result in immediate, great, irreparable and continuing harm and damage to Provider for which there is no adequate remedy at law. Organization further agrees that for a period of five years following the termination of a School from this Agreement, Organization shall not open a new program in that School, or open a new school facility within a radius of ten (10) miles of the School, which incorporates or attempts to incorporate any program which is similar or deceptively similar to the Athlos Academy, or its



programs, including programs provided by Outside Vendors. In the event Organization breaches this Agreement, Provider shall be entitled to obtain, from any court of competent jurisdiction, a temporary restraining order and preliminary and permanent injunctive relief, without the necessity of posting bond, to enforce the terms of this paragraph, in addition to any and all monetary damages allowed by law.

10. GOVERNING LAW. This Agreement shall be governed by, and construed in accordance with, the laws of the State of Nevada.

11. MEDIATION. The Parties agree to negotiate in good faith in an effort to resolve any dispute related to this Agreement that may arise within forty-five (45) days of the other party's receipt of such notice of dispute. If the dispute cannot be resolved by negotiation, then the Parties will submit the dispute to mediation before resorting to binding arbitration or litigation and will equally share the costs of a mutually acceptable third party mediator. This paragraph survives termination of this Agreement. This paragraph does not preclude a party from seeking equitable relief from a court of competent jurisdiction. In the event a dispute is submitted to litigation, that litigation shall be determined by a judge, and each party waives its right to a jury trial.

12. COUNSEL SOUGHT. Each Party acknowledges that (i) the Party was advised or represented by counsel in connection with the negotiation, preparation, revision and execution of this Agreement; (ii) before executing this Agreement, the Party discussed the Agreement with the Party's counsel and became fully informed of the terms, contents, conditions and effect of this Agreement; (iii) the Party is legally competent, as well as fully qualified and authorized to execute this Agreement; (iv) in executing this Agreement, the Party is not relying on any warranty, statement, promise or representation of any kind that has been made to the Party by any other Party, or by legal counsel for any other Party or anyone acting for another Party in any capacity, except as expressly stated in this Agreement; (v) each Party expressly disclaims reliance upon any facts, promises, warranties, undertakings, or representations, whether express or implied, by any other Party, or its agents or legal counsel as consideration for this Agreement, except for the explicit provisions of this Agreement; (vi) the Party has relied solely on the Party's own judgment and/or the advice of the Party's counsel in executing this Agreement; (vii) the Party understands the terms, contents, conditions, and effect of this Agreement, and voluntarily accepts the Agreement in its entirety; and (viii) each Party has executed this Agreement of its own free will as a free and voluntary act, without any duress, coercion or undue influence exerted by or on behalf of any person or entity.

13. SEVERABILITY. Any provision of this Agreement which shall prove to be invalid, void or illegal shall in no way affect, impair or invalidate any other provision hereof and such other provision shall remain in full force and effect.

14. AUTHORITY. To the extent that this Agreement is executed by a Party or Parties on behalf of an individual, corporation, governmental entity, trust, estate or other legal entity, such Party or Parties executing this Agreement represent that they have authority to act on behalf of the entities or individuals for which they purport to act and to bind those entities or individuals to the terms and conditions of this Agreement. Furthermore, as each Party is a legal entity, each Party acknowledges, represents, warrants and confirms that it has full and complete authorization and power to execute this Agreement in the capacity herein stated, and this Agreement is a valid, binding and enforceable obligation and does not violate any law, rule, regulation, contract or agreement enforceable against it.



15. ENTIRE AGREEMENT. This Agreement contains the entire agreement between the Parties, but only as concerns the specific matters addressed herein. Furthermore, this Agreement supersedes any and all prior or contemporaneous agreements and any and all prior or contemporaneous negotiations, understandings, warranties, discussions or representations, whether oral or written, and this Agreement is subject to modification, waiver, or addition only by means of a writing signed by the Party to be charged.

16. SUCCESSORS AND ASSIGNS. This Agreement is binding upon and inures to the benefit of the Parties and their respective successors, beneficiaries, administrators, and permitted assigns.

17. COUNTERPARTS. This Agreement may be executed in any number of counterparts, each of which will be deemed an original, and all of which together will constitute one and the same instrument. This Agreement may be transmitted to the Parties by facsimile or other electronic means, the Parties may sign and return their respective signatures by facsimile or other electronic means, and such signatures transmitted by facsimile or electronically will be presumed valid, binding, and of the same force and effect as an original signature to this Agreement.

18. TIME OF ESSENCE. Time is of the essence for any and all conditions, obligations and other requirements of this Agreement.

IN WITNESS WHEREOF, Organization and Provider have caused this Agreement to be executed as of the day and year first above written.

PROVIDER:	ORGANIZATION:
School Model Support LLC, an Idaho limited liability organization	_____, a
By: _____	By: _____
Name: _____	Name: _____
Title: _____	Title: _____

EXHIBIT A
SCHOOL IDENTIFICATION ADDENDUM

THIS ADDENDUM TO THE MASTER SCHOOL SERVICES AGREEMENT (the "**Addendum**") is made and entered into by and between School Model Support LLC, an Idaho limited liability organization ("**Provider**"), and _____, a _____ ("**Organization**"), and supplements that certain Master School Services Agreement by and between Organization and Provider dated _____, 201____. The effective date of this Addendum (the "**Effective Date**") shall be the later date of the dates this Addendum is executed by Organization and Provider below. All capitalized terms not defined herein shall have the meanings given to them in the Master School Services Agreement.

1. **SCHOOL LOCATION.** The School will be located at: _____ ("**Athlos-** _____").
2. **TERM COMMENCEMENT.** The term for Athlos - _____ shall commence upon full execution of this School Identification Addendum.
3. **FEE COMMENCEMENT.** The fee for Athlos- _____ shall commence upon the first day of school in its permanent facility.
5. **MARKETING.** Organization agrees that Provider may link the School's website on its corporate site to provide website traffic to mutually benefit the Parties.
6. All other provisions of the Agreement, unless specifically modified herein, remain in full force and effect.

IN WITNESS WHEREOF, each of said Parties has executed this Addendum the day and year written below.

PROVIDER:	ORGANIZATION:
School Model Support LLC, an Idaho limited liability organization	_____,
By: _____ Name: Title:	By: _____ Name: Title:
Date:	Date:

SCHEDULE 1 ATHLOS ATHLETIC EQUIPMENT LIST:

Provider purchases:

FOAM ROLLS / PB ELITE MOLDED ROLLER 1' LONG 6" ROUND
2lb. VINYL COVERED DUMBBELL VIOLET
3LB VINYL COVERED DUMBBELLS FOREST GREEN
4LB VINYL COVERED DUMBBELLS SKY BLUE
5LB VINYL COVERED DUMBBELLS NAVY BLUE
6LB VINYL COVERED DUMBBELLS RED
7LB VINYL COVERED DUMBBELLS PURPLE
8LB VINYL COVERED DUMBBELLS BLACK
9LB VINYL COVERED DUMBBELLS YELLOW
10LB VINYL COVERED DUMBBELLS ORANGE
JUNGLE GYM XT / SUSPENSION TRAINING
50' TRAINING ROPE (2" diameter) W/ ANCHOR
2KG FIRST PLACE MED BALL
3KG FIRST PLACE MED.BALL
4KG FIRST PLACE MED BALL
5KG FIRST PLACE MED BALL
MEDBALL RACK W/WHEELS
SET OF ECONO PLYBOXES 1 EACH: 12" 18" 24" 30"
12" CONE
9" SAUCER CONES SET OF 12
THE CAT
BULLET BELT DELUXE Pop & Rip Features
ABC SPEED/AGILITY LADDER HARD RUNG
BANANA STEPS 6" / MINI-HURDLES
BANANA STEPS 12" / MINI-HURDLES
MEDIUM ECONOMY CHUTE (14 LBS RESISTANCE)
RESISTANCE TRAINER WITH SHOULDER HARNESS
SUPERBAND 1" WIDE
SUPERBAND 1 3/4" THICK
SUPERBAND 2 1/2" WIDE
Pack of 10 Yellow Minibands
Pack of 10 Green Minibands
Pack of 10 Blue Minibands
Pack of 10 Black Minibands
PB DISC PILLOW
AIREX BALANCE PAD 20" x 16.4" x 2.5"
GYMNIC "PLUS" STABILITY BALL - 55 CM



GYMNIC "PLUS" STABILITY BALL - 65 CM
MAGIC SPEED ROPE /JUMP ROPE
6 LB First Place Jam Ball
8 LB First Place Jam Ball
10 LB First Place Jam Ball
12 LB First Place Jam Ball

Organization purchases:

FRISBEES
BALANCE BEAM
BEAN BAGS
SOCCOR BALLS
HULA HOOPS
TENNIS BALLS
TENNIS RAQUETS
DODGEBALLS
WHIFFLE BALLS
WHIFFLE BATS
FOOTBALLS
HOCKEY STICKS
BASKETBALLS
SCARFS
VOLLEYBALLS
BEACHBALLS
LACROSSE STICKS
RUBBER BALLS FOR HOCKEY AND LACROSSE

The above list is subject to change if Provider determines that the Athletic Curriculum needs adjustment for effective program implementation.

**SCHEDULE 2
FORM PROMISSORY NOTE**

\$_____._____, 20____

FOR VALUE RECEIVED, _____, a
_____ ("Maker"), unconditionally promises to pay to the order
of School Model Support LLC, an Idaho limited liability company ("Lender"), at 855 Broad Street,
Suite 300, Idaho 83702, or at such other place as Lender may designate to Maker in writing
from time to time, without any counterclaim, setoff or deduction whatsoever, on the Maturity
Date (as hereinafter defined) the principal sum of _____ AND ____/100
DOLLARS (\$_____) in lawful money of the United States of America. Such sum shall bear
interest at a rate of six percent (6%) compounded annually on the unpaid principal balance and,
in certain circumstances, interest may accrue at the Default Interest Rate (defined below).

**ARTICLE I
TERMS AND CONDITIONS**

1.01 Payment. This Note shall be payable as follows:

(a) Principal shall be due and payable in consecutive monthly installments of principal and interest in the amount of \$_____ each beginning on _____, 20____, and continuing on the thirtieth (30th) day of each and every month thereafter through and including _____, 20____ ("Maturity Date"). Each such monthly installment shall be applied first to the payment of interest and then to the reduction of principal. The Maturity Date shall not be later than twelve (12) months after the first payment is due according to the terms of this agreement.

(b) On the Maturity Date, the entire outstanding principal balance hereof, together with all accrued but unpaid interest shall be due and payable in full.

(c) For purposes of making payments hereunder, if the day on which such payment is due is not a Business Day, then amounts due on such date shall be due on the next Business Day. "Business Day" means a day that is not a Saturday, Sunday or other day on which national banking associations are closed in Boise, Idaho.

1.02 Prepayment. This Note may be prepaid in whole or in part prior to the Maturity Date.

1.03 Default.

(a) In the event that a default occurs because any regularly scheduled monthly installment payment is not received by Lender within five (5) days of the date when due, then in addition to any interest at the Default Interest Rate due hereunder, Maker shall also pay to Lender a late charge in an amount equal to five percent (5.0%) of the amount of such overdue payment in order to defray Lender's expenses in addressing and processing the delinquent payment and compensate Lender from the loss of the use of such payment. Such amount shall be immediately due to Lender, but shall not result in any extension of the Maturity Date.

(b) So long as any default exists hereunder, regardless of whether or not there has been an acceleration of the indebtedness evidenced hereby, and at all times after maturity of the



indebtedness evidenced hereby (whether by acceleration or otherwise), interest shall accrue on the outstanding principal balance of this Note at a rate per annum equal to twelve percent (12.0%), or if such rate of interest may not be collected under applicable law, then at the maximum rate of interest, if any, which may be collected from Maker under applicable law (the "Default Interest Rate"), and such interest at the Default Interest Rate shall be immediately due and payable.

(c) Maker acknowledges that it would be extremely difficult or impracticable to determine Lender's actual damages resulting from any late payment or default, and such late charges and interest at the Default Interest Rate are reasonable estimates of those damages and do not constitute a penalty. The remedies of Lender in this Note or at law or in equity, shall be cumulative and concurrent, and may be pursued singly, successively or together in Lender's discretion. Time is of the essence with respect to all matters concerning or relating to this Note. Maker agrees to pay on demand all expenses and costs of enforcement, administration and collection incurred or paid by Lender including, but not limited to, reasonable attorney's fees and disbursements of Lender, whether or not with respect to retained firms, the reimbursement for the expenses of in house staff, or otherwise and whether or not any legal proceeding is commenced hereunder. The foregoing amounts shall be paid together with interest thereon at the Default Interest Rate from the date paid or incurred by Lender until such expenses are paid by the Maker.

ARTICLE II GENERAL CONDITIONS

2.01 No Waiver; Amendment. Lender shall not by any act, delay, or omission or otherwise be deemed to have waived any of its rights or remedies, and no waiver of any kind shall be valid, unless in writing signed by Lender. All rights and remedies of Lender under this Note and under any statutes or rules of law shall be cumulative and may be exercised successively and concurrently. This Note may not be changed orally, but only by a definitive written agreement signed by the party against whom enforcement of any waiver, change, modification or discharge is sought.

2.02 Waivers. Presentment for payment, demand, protest and notice of demand, protest and nonpayment, notice of intent to accelerate maturity, notice of acceleration of maturity and all other notices are hereby waived by Maker.

2.03 Unconditional Payment. Maker is and shall be obligated to pay principal, interest at the Default Interest Rate, if any has accrued, and any and all other amounts which become payable hereunder absolutely and unconditionally and without any abatement, postponement, diminution or deduction and without any reduction for counterclaim or setoff. In the event that at any time any payment received by Lender hereunder shall be deemed by a court of competent jurisdiction to have been a voidable preference or fraudulent conveyance under any bankruptcy, insolvency or other debtor relief law, then the obligation to make such payment shall survive any cancellation or satisfaction of this Note or return thereof to Maker and shall not be discharged or satisfied with any prior payment thereof or cancellation of this Note, but shall remain a valid and binding obligation enforceable in accordance with the terms and provisions hereof, and such payment shall be immediately due and payable upon demand.

2.04 Submission to Jurisdiction; Waiver of Jury Trial.



(a) MAKER, TO THE FULL EXTENT PERMITTED BY LAW, HEREBY KNOWINGLY, INTENTIONALLY AND VOLUNTARILY, WITH AND UPON THE ADVICE OF COMPETENT COUNSEL, (A) SUBMITS TO PERSONAL JURISDICTION IN THE STATE OF IDAHO OVER ANY SUIT, ACTION OR PROCEEDING BY ANY PERSON ARISING FROM OR RELATING TO THIS NOTE; (B) AGREES THAT ANY SUCH ACTION, SUIT OR PROCEEDING MAY BE BROUGHT IN ANY STATE OR FEDERAL COURT OF COMPETENT JURISDICTION SITTING IN EITHER THE CITY OR THE COUNTY WHERE THE PROPERTY IS LOCATED; (C) SUBMITS TO THE JURISDICTION OF SUCH COURTS; (D) TO THE FULLEST EXTENT PERMITTED BY LAW, AGREES THAT MAKER WILL NOT BRING ANY ACTION, SUIT OR PROCEEDING IN ANY OTHER FORUM; AND (E) KNOWINGLY, AND VOLUNTARILY WAIVES ITS RIGHT TO A TRIAL BY JURY, AT THE ELECTION OF LENDER, FOR ANY LITIGATION RELATED TO THIS PROMISSORY NOTE.

2.05 Miscellaneous. This Note shall be interpreted, construed and enforced according to the laws of the State of Idaho and the applicable laws of the United States of America. The terms and provisions hereof shall be binding upon and inure to the benefit of Maker and Lender and their respective heirs, executors, legal representatives, successors, successors-in-title and assigns, whether by voluntary action of the parties or by operation of law. As used herein, the terms "Maker" and "Lender" shall be deemed to include their respective successors, successors in title and assigns, whether by voluntary action of the parties or by operation of law. Titles of articles and sections are for convenience only and in no way define, limit, amplify or describe the scope or intent of any provisions hereof. Time is of the essence with respect to all provisions of this Note. This Note contains the entire agreements between the parties hereto relating to the subject matter hereof and thereof and all prior agreements relative hereto and thereto which are not contained herein or therein are terminated.

IN WITNESS WHEREOF, the Maker, intending to be legally bound hereby, has duly executed this Note to be effective as of the day and year first written above.

MAKER:

_____,
a _____

By: _____



Appendix C: Budget Forms

Cash Flow Projection													
Athlos Academy													
Beginning Cash	\$ 77,600	\$275,085	\$323,757	\$313,505	\$293,683	\$282,291	\$313,019	\$302,926	\$332,213	\$351,725	\$346,739	\$341,753	
Revenue	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Local	\$ -	\$ 28,364	\$ 28,364	\$ 28,104	\$ 28,104	\$ 28,104	\$ 28,104	\$ 28,104	\$ 28,104	\$ 28,104	\$ 28,104	\$ 28,104	\$ 309,660
State	\$ 584,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 484,226	\$ 5,910,713
Federal				\$ 13,416	\$ 13,416	\$ 13,416	\$ 76,416	\$ 13,416	\$ 13,416	\$ 44,916	\$ 13,416	\$ 13,416	\$ 215,244
Total	\$ 584,226	\$ 512,590	\$ 512,590	\$ 525,746	\$ 525,746	\$ 525,746	\$ 588,746	\$ 525,746	\$ 525,746	\$ 557,246	\$ 525,746	\$ 525,746	\$ 6,435,617
Expenses													
Compensation	\$ 6,627	\$ 121,466	\$ 275,552	\$ 275,552	\$ 275,552	\$ 275,552	\$ 275,552	\$ 275,552	\$ 275,552	\$ 275,552	\$ 275,552	\$ 275,552	\$ 2,883,614
Services	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 94,250	\$ 1,131,000
Supplies & Equipment	\$ 194,127	\$ 194,127	\$ 194,127	\$ 21,570	\$ 21,570	\$ 21,570	\$ 21,570	\$ 21,570	\$ 21,570	\$ 21,570	\$ 21,570	\$ 21,570	\$ 776,507
Other	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 6,703	\$ 80,440
Total	\$ 301,708	\$ 416,546	\$ 570,632	\$ 398,075	\$ 398,075	\$ 398,075	\$ 398,075	\$ 398,075	\$ 398,075	\$ 398,075	\$ 398,075	\$ 398,075	\$ 4,871,561
Net Income	\$ 282,518	\$ 96,043	\$ (58,042)	\$ 127,671	\$ 127,671	\$ 127,671	\$ 190,671	\$ 127,671	\$ 127,671	\$ 159,171	\$ 127,671	\$ 127,671	
Ending Cash	\$ 360,118	\$ 371,128	\$ 265,715	\$ 441,176	\$ 421,354	\$ 409,962	\$ 503,690	\$ 430,597	\$ 459,884	\$ 510,896	\$ 474,410	\$ 469,424	

Charter School Name: Athlos Academy		Fiscal Year: 2016		
Revenue		Planning Year		
Total Revenue From Local Sources (1000)		\$0		
Charter School Startup Grant		\$140,000		
Charter School Revolving Loan		\$270,000		
Total Revenue from State Sources (3000)		\$410,000		
Restricted Federal Through State		\$0		
Total Revenue from Federal Sources (4000)		\$0		
Private Grants & Donations :		\$0		
Source(s) (specify)		\$0		
Loans:				
Commercial		\$0		
Contributions and Donations from Private Sources		\$0		
Other (specify)		\$0		
Total Revenue from Other Sources (5000)		\$0		
Total Revenue		\$410,000		
Expenditures		Number	Salary or Cost	Total
--- SALARIES ---				
10.131	Salaries - Teachers			\$0
10.132	Salaries - Substitute Teachers			\$0
10.161	Salaries - Teacher Aides and Paraprofessionals			\$0
10.100	Salaries - Other 1000-INSTRUCTION			\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)			\$0
21.141	Salaries - Attendance and Social Work Personnel			\$0
21.142	Salaries - Guidance Personnel			\$0
21.143	Salaries - Health Services Personnel			\$0
21.144	Salaries - Psychological Personnel			\$0
21.152	Salaries - Secretarial and Clerical			\$0
21.100	Salaries - ACADEMIC DIRECTOR			\$0
	Total 21 (2100)-STUDENT SUPPORT Salaries (100)			\$0
22.145	Salaries - Media Personnel - Certified			\$0
22.162	Salaries - Media Personnel - Noncertified			\$0
22.100	Salaries - Other 2200-INSTRUCTIONAL STAFF SUPPORT			\$0
	Total 22 (2200)-INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$0
24.121	Salaries - Principals and Assistants			\$0
24.152	Salaries - Secretarial and Clerical			\$0
24.100	Salaries - Other 2400-SCHOOL ADMINISTRATION			\$0
	Total 24 (2400)-SCHOOL ADMINISTRATION Salaries (100)			\$0
26.100	Salaries - Operation & Maintenance of Facilities			\$0
	Total 26 (2600)-OPERATION & MAINT OF FACILITIES Salaries (100)			\$0
31.100	Salaries - FOOD SERVICES			\$0
	Total 31 (3100)-FOOD SERVICES Salaries (100)			\$0
45.100	Salaries - Building Acquisition			\$0
	Total 45 (4500)-BUILDING ACQUISITION Salaries (100)			\$0
	TOTAL - ALL SALARIES (100)			\$0
--- BENEFITS ---				
10.210	Retirement - INSTRUCTION	0%		\$0
21.210	Retirement - STUDENT SUPPORT	0%		\$0
22.210	Retirement - INSTRUCTIONAL STAFF SUPPORT	0%		\$0
24.210	Retirement - SCHOOL ADMINISTRATION	0%		\$0
26.210	Retirement - OPERATION & MAINT OFFACILITIES	0%		\$0



31.210	Retirement - FOOD SERVICES	0%		\$0
45.210	Retirement - BUILDING ACQUISITION	0%		\$0
	TOTAL - ALL RETIREMENT			\$0
10.220	Social Security/FICA/UNEMP/WCF - INSTRUCTION	10%		\$0
21.220	Social Security/FICA/UNEMP/WCF - STUDENT SUPPORT	10%		\$0
22.220	Social Security/FICA/UNEMP/WCF - INSTRUCTIONAL STAFF SUPPO	10%		\$0
24.220	Social Security/FICA/UNEMP/WCF -SCHOOL ADMINISTRATION	10%		\$0
26.220	Social Security/FICA/UNEMP/WCF - OPERATION & MAINT OF FACIL	10%		\$0
31.220	Social Security - FOOD SERVICES	10%		\$0
45.220	Social Security/FICA/UNEMP/WCF - BUILDING ACQUISITION	10%		\$0
	TOTAL - ALL SOCIAL SECURITY/FICA/UNEMP/WCF			\$0
10.240	Insurance (Health/Dental/Life) - INSTRUCTION	11%		\$0
21.240	Insurance (Health/Dental/Life) - STUDENT SUPPORT	11%		\$0
22.240	Insurance (Health/Dental/Life) - INSTRUCTIONAL STAFF SUPPORT	11%		\$0
24.240	Insurance (Health/Dental/Life) - SCHOOL ADMINISTRATION	11%		\$0
26.240	Insurance (Health/Dental/Life) - OPERATION & MAINT OF FACILITIES	11%		\$0
31.240	Insurance (Health/Dental/Life) - FOOD SERVICES	11%		\$0
45.240	Insurance (Health/Dental/Life) - BUILDING ACQUISITION	11%		\$0
	TOTAL - ALL INSURANCE (Health/Dental/Life)			\$0
10.200	Other Benefits (specify) - INSTRUCTION			\$0
21.200	Other Benefits (specify) - STUDENT SUPPORT			\$0
22.200	Other Benefits (specify) - INSTRUCTIONAL STAFF SUPPORT			\$0
24.200	Other Benefits (specify) - SCHOOL ADMINISTRATION			\$0
26.200	Other Benefits (specify) - OPERATION & MAINT OF FACILITIES			\$0
31.200	Other Benefits (specify) - FOOD SERVICES			\$0
45.200	Other Benefits (specify) - BUILDING ACQUISITION			\$0
	TOTAL - ALL OTHER BENEFITS (specify)			\$0
	TOTAL ALL BENEFITS (200)			\$0
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES---				
10.300	Purchased Prof & Tech Services - INSTRUCTION			
21.300	Purchased Prof & Tech Services - STUDENT SUPPORT			\$10,000
22.300	Purchased Prof & Tech Services - INSTRUCTIONAL STAFF SUPPORT			\$5,000
24.300	Purchased Prof & Tech Services - SCHOOL ADMINISTRATION			\$50,000
26.300	Purchased Prof & Tech Services - OPERATION & MAINT OFFACILITIES			
31.300	Purchased Prof & Tech Services - FOOD SERVICES			
45.300	Purchased Prof & Tech Services - BUILDING ACQUISITION			
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			\$65,000
--- PURCHASED PROPERTY SERVICES---				
26.400	Purchased Property Services			
26.460	Construction and Remodeling			
45.400	Purchased Property Services			
45.460	Construction and Remodeling			
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			\$0
--- OTHER PURCHASED SERVICES ---				
26.500	Other Purchased Services - OPERATION & MAINT OFFACILITIES			\$2,000
26.500	Other Purchased Services - BUILDING ACQUISITION			
	TOTAL - ALL OTHER PURCHASED SERVICES (500)			\$2,000
--- SUPPLIES ---				
10.600	Instructional Supplies - INSTRUCTION			
10.641	Textbooks - INSTRUCTION			\$83,200
21.600	Supplies - STUDENT SUPPORT SERVICES			
22.600	Supplies - INSTRUCTIONAL STAFF SUPPORT			



22.644	Library Books - INSTRUCTIONAL STAFF SUPPORT			
22.650	Periodicals - INSTRUCTIONAL STAFF SUPPORT			
22.660	Audio Visual Materials - INSTRUCTIONAL STAFF SUPPORT			
24.600	Supplies - SCHOOL ADMINISTRATION			\$5,000
26.600	Supplies - OPERATION & MAINT OF FACILITIES			
31.600	Supplies - FOOD SERVICES			
31.630	Food - FOOD SERVICES			
45.600	Supplies - New Buildings - BUILDING ACQUISITION & INSTR			
45.641	Textbooks - New Buildings - BUILDING ACQUISITION & INSTR			
45.644	Library Books-New Libraries - BUILDING ACQUISITION & INSTR			
	TOTAL - ALL SUPPLIES (600)			\$88,200
--- PROPERTY ---				
10.700	Property (Instructional Equipment) - INSTRUCTION			\$157,400
21.700	Property - STUDENT SUPPORT SERVICES			
22.700	Property - INSTRUCTIONAL STAFF SUPPORT			\$25,150
24.700	Property - SCHOOL ADMINISTRATION			
26.700	Property - OPERATION & MAINT OF FACILITIES			
31.700	Property - FOOD SERVICES			
31.780	Depreciation - Kitchen Equipment Depreciation - FOOD SERVICES			
45.710	Land and Improvements			
45.720	Buildings			
45.731	Machinery			
45.732	School Buses			
45.733	Furniture and Fixtures			
45.734	Technology Equipment			
45.735	Non-Bus Vehicles			
45.739	Other Equipment			
	TOTAL - ALL PROPERTY (700)			\$182,550
	--- OTHER---			
10.800	Other Objects- INSTRUCTION			
21.800	Other Objects- STUDENT SUPPORT SERVICES			
22.800	Other Objects- INSTRUCTIONAL STAFF SUPPORT			
24.800	Other Objects- SCHOOL ADMINISTRATION			
26.800	Other Objects - OPERATION & MAINT OF FACILITIES			
31.800	Other Objects - FOOD SERVICES			
45.800	Other Objects - BUILDING ACQUISITION & INSTR			
	TOTAL - ALL OTHER OBJECTS			
10.810	Dues and Fees - INSTRUCTION			
21.810	Dues and Fees - STUDENT SUPPORT SERVICES			
22.810	Dues and Fees - INSTRUCTIONAL STAFF SUPPORT			
24.810	Dues and Fees -SCHOOL ADMINISTRATION			
26.810	Dues and Fees - OPERATION & MAINT OF FACILITIES			
	TOTAL - ALL DUES AND FEES			
	TOTAL - OTHER OBJECTS (800)			\$0
1000	Total Local			\$0
3000	Total State			\$410,000
4000	Total Federal			\$0
TOTAL REVENUES				\$410,000
100	Salaries			\$0
200	Employee Benefits			\$0

300	Purchased Professional and Technical Services	\$65,000
400	Purchased Property Services	\$0
500	Other Purchased Services	\$2,000
600	Supplies	\$88,200
700	Property	\$182,550
800	Other Objects	\$0
TOTAL EXPENDITURES		\$337,750

Excess or Deficiency of Revenues over Expenditures	\$72,250
her Sources of Funding (5000)	\$0
Net Asset Balance (Fund Balance)	\$72,250
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)	18%
Percentage of Funding Contributed to Reserve Balance (Total Rev - Total Exp / Total Rev = >5%)	18%
Necessary Closure Fund (2 months Purchased Prop Serv + Other)	\$0

Charter School Name: Athlos Academy			Fiscal Year: 2017					
First Operational Year			100% Enrollment			75% Enrollment		
Number of Students:			832			624		
Grade Configuration:								
Revenue								
Child Nutrition Program (CNP) and Lunchroom Sales			\$205,920			\$154,440		
Student Activities			\$41,600			\$31,200		
Other			\$20,800			\$15,600		
Total Revenue From Local Sources (1000)			\$268,320			\$201,240		
State Educational Funding			\$4,539,303			\$3,437,949		
Implementation Grant			\$100,000			\$100,000		
Total Revenue from State Sources (3000)			\$4,639,303			\$3,537,949		
Lunch and Breakfast Reimbursement			\$128,794			\$96,595		
Donated Commodities (CNP)			\$0			\$0		
Restricted Federal Through State			\$0			\$0		
Programs for the Disabled (IDEA)			\$78,000			\$58,500		
No Child Left Behind (NCLB)			\$48,000			\$36,000		
Total Revenue from Federal Sources (4000)			\$254,794			\$191,095		
Private Grants & Donations:			\$0			\$0		
Source(s) (specify)			\$0			\$0		
Loans:			\$0			\$0		
Commercial			\$0			\$0		
Contributions and Donations from Private Sources			\$0			\$0		
Other (specify)			\$0			\$0		
Prior Year Carryforward			\$72,250			\$72,250		
Total Revenue from Other Sources (5000)			\$72,250			\$72,250		
Total Revenue			\$5,234,666			\$4,002,534		
Expenditures			Number	Salary or Cost	Total	Number	Salary or Cost	Total
--- SALARIES ---								
10.131	Salaries - Teachers		39.00	\$40,000	\$1,560,000	31.00	\$38,000	\$1,178,000
10.132	Salaries - Substitute Teachers		195.00	\$100	\$19,500	155.00	\$100	\$15,500
10.161	Salaries - Teacher Aides and Paraprofessionals		11.00	\$10,890	\$119,790	8.00	\$9,900	\$79,200
10.100	Salaries - Other 1000-INSTRUCTION				\$0			\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)				\$1,699,290			\$1,272,700
21.141	Salaries - Attendance and Social Work Personnel		1.00	\$32,000	\$32,000	0.50	\$32,000	\$16,000
21.142	Salaries - Guidance Personnel		1.00	\$40,000	\$40,000	0.75	\$40,000	\$30,000
21.143	Salaries - Health Services Personnel				\$0			\$0
21.144	Salaries - Psychological Personnel				\$0			\$0
21.152	Salaries - Secretarial and Clerical		1.00	\$32,000	\$32,000	0.50	\$32,000	\$16,000
21.100	Salaries - Other 2100-STUDENT SUPPORT				\$0			\$0
	Total 21 (2100)-STUDENT SUPPORT Salaries (100)				\$104,000			\$62,000
22.145	Salaries - Media Personnel - Certified		1.00	\$40,000	\$40,000	0.50	\$38,000	\$19,000
22.162	Salaries - Media Personnel - Noncertified				\$0			\$0
22.100	Salaries - Other 2200-INSTRUCTIONAL STAFF SUPPORT				\$0			\$0
	Total 22 (2200)-INSTRUCTIONAL STAFF SUPPORT Salaries (100)				\$40,000			\$19,000
24.121	Salaries - Principals and Assistants				\$0			\$0
24.152	Salaries - Secretarial and Clerical		1.50	\$32,000	\$48,000	1.00	\$32,000	\$32,000
24.100	Salaries - Other 2400-Business Administrator				\$0			\$0
	Total 24 (2400)-SCHOOL ADMINISTRATION Salaries (100)				\$48,000			\$32,000
26.100	Salaries - Operation & Maintenance of Facilities		2.50	\$30,000	\$75,000	2.00	\$30,000	\$60,000
	Total 26 (2600)-OPERATION & MAINT OF FACILITIES Salaries (100)				\$75,000			\$60,000
31.100	Salaries - FOOD SERVICES		3.00	\$30,000	\$90,000	2.50	\$30,000	\$75,000
	Total 31 (3100)-FOOD SERVICES Salaries (100)				\$90,000			\$75,000
45.100	Salaries - Building Acquisition				\$0			\$0
	Total 45 (4500)-BUILDING ACQUISITION Salaries (100)				\$0			\$0
	TOTAL - ALL SALARIES (100)				\$2,056,290			\$1,520,700
--- BENEFITS ---								
10.210	Retirement - INSTRUCTION		4%		\$67,972	3%		\$31,818
21.210	Retirement - STUDENT SUPPORT		4%		\$4,160	3%		\$1,550
22.210	Retirement - INSTRUCTIONAL STAFF SUPPORT		4%		\$1,600	3%		\$475
24.210	Retirement - SCHOOL ADMINISTRATION		4%		\$1,920	3%		\$800
26.210	Retirement - OPERATION & MAINT OF FACILITIES		4%		\$3,000	3%		\$1,500
31.210	Retirement - FOOD SERVICES		4%		\$3,600	3%		\$1,875
45.210	Retirement - BUILDING ACQUISITION		4%		\$0	3%		\$0
	TOTAL - ALL RETIREMENT				\$82,252			\$38,018
10.220	Social Security/FICA/UNEMP/WCF - INSTRUCTION		10%		\$169,929	10%		\$127,270
21.220	Social Security/FICA/UNEMP/WCF - STUDENT SUPPORT		10%		\$10,400	10%		\$6,200



22.220	Social Security/FICA/UNEMP/WCF - INSTRUCTIONAL STAFF SUPP	10%		\$4,000	10%		\$1,900
24.220	Social Security/FICA/UNEMP/WCF -SCHOOL ADMINISTRATION	10%		\$4,800	10%		\$3,200
26.220	Social Security/FICA/UNEMP/WCF - OPERATION & MAINT OF FACI	10%		\$7,500	10%		\$6,000
31.220	Social Security - FOOD SERVICES	10%		\$9,000	10%		\$7,500
45.220	Social Security/FICA/UNEMP/WCF - BUILDING ACQUISITION	10%		\$0	10%		\$0
	TOTAL - ALL SOCIAL SECURITY/FICA/UNEMP/WCF			\$205,629			\$152,070
10.240	Insurance (Health/Dental/Life) - INSTRUCTION	11%		\$163,800	10%		\$117,800
21.240	Insurance (Health/Dental/Life) - STUDENT SUPPORT	11%		\$10,920	10%		\$6,200
22.240	Insurance (Health/Dental/Life) - INSTRUCTIONAL STAFF SUPPORT	11%		\$4,200	10%		\$1,900
24.240	Insurance (Health/Dental/Life) - SCHOOL ADMINISTRATION	11%		\$5,040	10%		\$3,200
26.240	Insurance (Health/Dental/Life) - OPERATION & MAINT OF FACILITIES	11%		\$7,875	10%		\$6,000
31.240	Insurance (Health/Dental/Life) - FOOD SERVICES	11%		\$9,450	10%		\$7,500
45.240	Insurance (Health/Dental/Life) - BUILDING ACQUISITION	11%		\$0	10%		\$0
	TOTAL - ALL INSURANCE (Health/Dental/Life)			\$201,285			\$142,600
10.200	Other Benefits (specify) - INSTRUCTION			\$0			\$0
21.200	Other Benefits (specify) - STUDENT SUPPORT			\$0			\$0
22.200	Other Benefits (specify) - INSTRUCTIONAL STAFF SUPPORT			\$0			\$0
24.200	Other Benefits (specify) - SCHOOL ADMINISTRATION			\$0			\$0
26.200	Other Benefits (specify) - OPERATION & MAINT OF FACILITIES			\$0			\$0
31.200	Other Benefits (specify) - FOOD SERVICES			\$0			\$0
45.200	Other Benefits (specify) - BUILDING ACQUISITION			\$0			\$0
	TOTAL - ALL OTHER BENEFITS (specify)			\$0			\$0
	TOTAL ALL BENEFITS (200)		24%	\$489,166		22%	\$332,688
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---							
10.300	Purchased Prof & Tech Services - INSTRUCTION			\$10,000			\$7,500
21.300	Purchased Prof & Tech Services - STUDENT SUPPORT			\$55,000			\$41,250
22.300	Purchased Prof & Tech Services - INSTRUCTIONAL STAFF SUPPORT			\$20,000			\$15,000
24.300	Purchased Prof & Tech Services - SCHOOL ADMINISTRATION			\$748,800			\$514,800
26.300	Purchased Prof & Tech Services - OPERATION & MAINT OF FACILITIES						
31.300	Purchased Prof & Tech Services - FOOD SERVICES						
45.300	Purchased Prof & Tech Services - BUILDING ACQUISITION						
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			\$833,800			\$578,550
--- PURCHASED PROPERTY SERVICES ---							
26.400	Facility Lease and Property Tax			\$851,000			\$851,000
26.460	Construction and Remodeling						
45.400	Purchased Property Services			\$20,000			\$20,000
45.460	Construction and Remodeling						
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)		16%	\$871,000			\$871,000
--- OTHER PURCHASED SERVICES ---							
26.500	Other Purchased Services - OPERATION & MAINT OF FACILITIES			\$15,000			\$15,000
21.500	Other Purchased Services - ADVERTISING			\$10,000			\$7,450
	TOTAL - ALL OTHER PURCHASED SERVICES (500)			\$25,000			\$22,450
--- SUPPLIES ---							
10.600	Instructional Supplies - INSTRUCTION			\$16,640			\$12,480
10.641	Textbooks - INSTRUCTION			\$62,400			\$46,800
21.600	Supplies - STUDENT SUPPORT			\$6,000			\$4,500
22.600	Supplies - INSTRUCTIONAL STAFF SUPPORT			\$2,500			\$1,875
22.644	Library Books - INSTRUCTIONAL STAFFSUPPORT			\$20,800			\$10,400
22.650	Periodicals - INSTRUCTIONAL STAFF SUPPORT						
22.660	Audio Visual Materials - INSTRUCTIONAL STAFF SUPPORT						
24.600	Supplies - SCHOOL ADMINISTRATION			\$12,480			\$9,360
26.600	Supplies - OPERATION & MAINT OF FACILITIES			\$80,800			\$72,720
31.600	Supplies - FOOD SERVICES			\$9,492			\$6,726
31.630	Food - FOOD SERVICES			\$189,832			\$134,524
45.600	Supplies - New Buildings - BUILDING ACQUISITION & INSTR						
45.641	Textbooks - New Buildings - BUILDING ACQUISITION & INSTR						
45.644	Library Books-New Libraries - BUILDING ACQUISITION & INSTR						
	TOTAL - ALL SUPPLIES (600)			\$400,944			\$299,385
--- PROPERTY ---							
10.700	Property (Instructional Equipment) - INSTRUCTION			\$58,160			\$29,080
21.700	Property - STUDENT SUPPORT SERVICES						
22.700	Property - INSTRUCTIONAL STAFFSUPPORT						
24.700	Property - SCHOOL ADMINISTRATION			\$16,640			\$8,320
26.700	Property - OPERATION & MAINT OF FACILITIES			\$16,640			\$8,320
31.700	Property - FOOD SERVICES						
31.780	Depreciation - Kitchen Equipment Depreciation - FOOD SERVICES						
45.710	Land and Improvements						
45.720	Buildings						
45.731	Machinery						
45.732	School Buses						

45.733	Furniture and Fixtures					
45.734	Technology Equipment					
45.735	Non-Bus Vehicles					
45.739	Other Equipment					
	TOTAL - ALL PROPERTY (700)			\$91,440		\$45,720
--- OTHER OBJECTS ---						
10.800	Other Objects- INSTRUCTION			\$1,000		\$750
21.800	Other Objects- STUDENT SUPPORT SERVICES					
22.800	Other Objects- INSTRUCTIONAL STAFF SUPPORT					
24.800	Other Objects- LOAN PAYMENT			\$70,200		\$70,200
26.800	Other Objects - OPERATION & MAINT OF FACILITIES			\$3,000		\$2,250
31.800	Other Objects - FOOD SERVICES					
45.800	Other Objects - BUILDING ACQUISITION & INSTR					
	TOTAL - ALL OTHER OBJECTS					
10.810	Dues and Fees - INSTRUCTION					
21.810	Dues and Fees - STUDENT SUPPORT SERVICES					
22.810	Dues and Fees - INSTRUCTIONAL STAFF SUPPORT					
24.810	Dues and Fees -SCHOOL ADMINISTRATION			\$4,992		\$3,744
26.810	Dues and Fees - OPERATION & MAINT OF FACILITIES					
	TOTAL - ALL DUES AND FEES					
	TOTAL - OTHER OBJECTS (800)			\$79,192		\$76,944
	Total Building Acquisition & Instruction (4500)			\$83,192		\$79,944
830	Interest			\$0		\$0
840	Redemption of Principal			\$0		\$0
	Total other financing sources (uses) and other items			\$0		\$0

1000	Total Local			\$268,320		\$201,240
3000	Total State			\$4,639,303		\$3,537,949
4000	Total Federal			\$254,794		\$191,095
TOTAL REVENUES				\$5,162,416		\$3,930,284
100	Salaries			\$2,056,290		\$1,520,700
200	Employee Benefits			\$489,166		\$332,688
300	Purchased Professional and Technical Services			\$833,800		\$578,550
400	Purchased Property Services			\$871,000		\$871,000
500	Other Purchased Services			\$25,000		\$22,450
600	Supplies			\$400,944		\$299,385
700	Property			\$91,440		\$45,720
800	Other Objects			\$79,192		\$76,944
TOTAL EXPENDITURES				\$4,846,832		\$3,747,436
Excess or Deficiency of Revenues over Expenditures				\$315,585		\$182,847
Other Sources of Funding (5000)				\$72,250		\$72,250
Net Asset Balance (Fund Balance)				\$387,835		\$255,097
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)				8%		6%
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)				6%		5%
Necessary Closure Fund (2 months Purch Prop Serv + Other)				\$158,365		\$157,991

Charter School Name: Athlos Academy		Fiscal Year: 2018					
First Operational Year		100% Enrollment			75% Enrollment		
Number of Students:		936			702		
Grade Configuration:							
Revenue							
Child Nutrition Program (CNP) and Lunchroom Sales		\$231,660			\$173,745		
Student Activities		\$46,800			\$35,100		
Other		\$23,400			\$17,550		
Total Revenue From Local Sources (1000)		\$301,860			\$226,395		
State Educational Funding		\$5,165,370			\$3,907,193		
Implementation Grant		\$60,000			\$60,000		
Total Revenue from State Sources (3000)		\$5,225,370			\$3,967,193		
Lunch and Breakfast Reimbursement		\$144,893			\$108,670		
Donated Commodities (CNP)		\$0			\$0		
Restricted Federal Through State		\$0			\$0		
Programs for the Disabled (IDEA)		\$80,340			\$60,255		
No Child Left Behind (NCLB)		\$49,440			\$37,080		
Total Revenue from Federal Sources (4000)		\$274,673			\$206,005		
Private Grants & Donations:		\$0			\$0		
Source(s) (specify)		\$0			\$0		
Loans:		\$0			\$0		
Commercial		\$0			\$0		
Contributions and Donations from Private Sources		\$0			\$0		
Other (specify)		\$0			\$0		
Prior Year Carryforward		\$387,835			\$255,097		
Total Revenue from Other Sources (5000)		\$387,835			\$255,097		
Total Revenue		\$6,189,738			\$4,654,690		
Expenditures		Number	Salary or Cost	Total	Number	Salary or Cost	Total
--- SALARIES ---							
10.131	Salaries - Teachers	45.00	\$41,000	\$1,845,000	36.00	\$38,000	\$1,368,000
10.132	Salaries - Substitute Teachers	225.00	\$100	\$22,500	180.00	\$100	\$18,000
10.161	Salaries - Teacher Aides and Paraprofessionals	13.00	\$11,217	\$145,817	9.00	\$9,900	\$89,100
10.100	Salaries - Other 1000-INSTRUCTION			\$0			\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)			\$2,013,317			\$1,475,100
21.141	Salaries - Attendance and Social Work Personnel	1.00	\$32,960	\$32,960	0.50	\$32,000	\$16,000
21.142	Salaries - Guidance Personnel	1.00	\$41,200	\$41,200	0.75	\$41,200	\$30,900
21.143	Salaries - Health Services Personnel			\$0			\$0
21.144	Salaries - Psychological Personnel			\$0			\$0
21.152	Salaries - Secretarial and Clerical	1.00	\$32,960	\$32,960	0.50	\$32,960	\$16,480
21.100	Salaries - Other 2100-STUDENT SUPPORT			\$0			\$0
	Total 21 (2100)-STUDENT SUPPORT Salaries (100)			\$107,120			\$63,380
22.145	Salaries - Media Personnel - Certified	1.00	\$41,200	\$41,200	0.50	\$39,140	\$19,570
22.162	Salaries - Media Personnel - Noncertified			\$0			\$0
22.100	Salaries - Other 2200-INSTRUCTIONAL STAFF SUPPORT			\$0			\$0
	Total 22 (2200)-INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$41,200			\$19,570
24.121	Salaries - Principals and Assistants			\$0			\$0
24.152	Salaries - Secretarial and Clerical	1.50	\$32,960	\$49,440	1.00	\$32,960	\$32,960
24.100	Salaries - Other 2400-Business Administrator			\$0			\$0
	Total 24 (2400)-SCHOOL ADMINISTRATION Salaries (100)			\$49,440			\$32,960
26.100	Salaries - Operation & Maintenance of Facilities	3.00	\$30,900	\$92,700	2.50	\$30,900	\$77,250
	Total 26 (2600)-OPERATION & MAINT OF FACILITIES Salaries (100)			\$92,700			\$77,250
31.100	Salaries - FOOD SERVICES	3.00	\$30,900	\$92,700	2.50	\$30,000	\$75,000
	Total 31 (3100)-FOOD SERVICES Salaries (100)			\$92,700			\$75,000
45.100	Salaries - Building Acquisition			\$0			\$0
	Total 45 (4500)-BUILDING ACQUISITION Salaries (100)			\$0			\$0
	TOTAL - ALL SALARIES (100)			\$2,396,477			\$1,743,260
--- BENEFITS ---							
10.210	Retirement - INSTRUCTION	4%		\$73,800	3%		\$41,040
21.210	Retirement - STUDENT SUPPORT	4%		\$4,285	3%		\$1,901
22.210	Retirement - INSTRUCTIONAL STAFF SUPPORT	4%		\$1,648	3%		\$587
24.210	Retirement - SCHOOL ADMINISTRATION	4%		\$1,978	3%		\$989
26.210	Retirement - OPERATION & MAINT OF FACILITIES	2%		\$1,854	3%		\$2,318
31.210	Retirement - FOOD SERVICES	4%		\$3,708	3%		\$2,250
45.210	Retirement - BUILDING ACQUISITION	4%		\$0	3%		\$0
	TOTAL - ALL RETIREMENT			\$87,272			\$49,085
10.220	Social Security/FICA/UNEMP/WCF - INSTRUCTION	10%		\$178,042.5	10%		\$142,347
21.220	Social Security/FICA/UNEMP/WCF - STUDENT SUPPORT	10%		\$10,337	10%		\$6,116



22.220	Social Security/FICA/UNEMP/WCF - INSTRUCTIONAL STAFF SUPP	10%		\$3,976	10%		\$1,889
24.220	Social Security/FICA/UNEMP/WCF - SCHOOL ADMINISTRATION	10%		\$4,771	10%		\$3,181
26.220	Social Security/FICA/UNEMP/WCF - OPERATION & MAINT OF FACI	10%		\$8,946	10%		\$7,455
31.220	Social Security - FOOD SERVICES	10%		\$8,946	10%		\$7,238
45.220	Social Security/FICA/UNEMP/WCF - BUILDING ACQUISITION	10%		\$0	10%		\$0
	TOTAL - ALL SOCIAL SECURITY/FICA/UNEMP/WCF			\$215,017			\$168,225
10.240	Insurance (Health/Dental/Life) - INSTRUCTION	12%		\$221,400	11%		\$143,640
21.240	Insurance (Health/Dental/Life) - STUDENT SUPPORT	12%		\$12,854	11%		\$6,655
22.240	Insurance (Health/Dental/Life) - INSTRUCTIONAL STAFF SUPPORT	12%		\$4,944	11%		\$2,055
24.240	Insurance (Health/Dental/Life) - SCHOOL ADMINISTRATION	12%		\$5,933	11%		\$3,461
26.240	Insurance (Health/Dental/Life) - OPERATION & MAINT OF FACILITIE	12%		\$11,124	11%		\$8,111
31.240	Insurance (Health/Dental/Life) - FOOD SERVICES	12%		\$11,124	11%		\$7,875
45.240	Insurance (Health/Dental/Life) - BUILDING ACQUISITION	12%		\$0	11%		\$0
	TOTAL - ALL INSURANCE (Health/Dental/Life)			\$267,379			\$171,797
10.200	Other Benefits (specify) - INSTRUCTION			\$0			\$0
21.200	Other Benefits (specify) - STUDENT SUPPORT			\$0			\$0
22.200	Other Benefits (specify) - INSTRUCTIONAL STAFF SUPPORT			\$0			\$0
24.200	Other Benefits (specify) - SCHOOL ADMINISTRATION			\$0			\$0
26.200	Other Benefits (specify) - OPERATION & MAINT OF FACILITIES			\$0			\$0
31.200	Other Benefits (specify) - FOOD SERVICES			\$0			\$0
45.200	Other Benefits (specify) - BUILDING ACQUISITION			\$0			\$0
	TOTAL - ALL OTHER BENEFITS (specify)			\$0			\$0
	TOTAL ALL BENEFITS (200)			\$569,669			\$389,106
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---							
10.300	Purchased Prof & Tech Services - INSTRUCTION			\$10,000			
21.300	Purchased Prof & Tech Services - STUDENT SUPPORT			\$60,500			\$45,375
22.300	Purchased Prof & Tech Services - INSTRUCTIONAL STAFF SUPPORT			\$20,000			\$15,000
24.300	Purchased Prof & Tech Services - SCHOOL ADMINISTRATION			\$748,800			\$514,800
26.300	Purchased Prof & Tech Services - OPERATION & MAINT OF FACILITIES						
31.300	Purchased Prof & Tech Services - FOOD SERVICES						
45.300	Purchased Prof & Tech Services - BUILDING ACQUISITION						
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			\$839,300			\$575,175
--- PURCHASED PROPERTY SERVICES ---							
26.400	Facility Lease and Property Tax			\$1,063,500			\$1,063,500
26.460	Construction and Remodeling						
45.400	Purchased Property Services			\$15,000			\$15,000
45.460	Construction and Remodeling						
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			\$1,078,500			\$1,078,500
--- OTHER PURCHASED SERVICES ---							
26.500	Other Purchased Services - OPERATION & MAINT OF FACILITIES			\$15,000			\$15,000
21.500	Other Purchased Services - ADVERTISING			\$5,000			\$5,000
	TOTAL - ALL OTHER PURCHASED SERVICES (500)			\$20,000			\$20,000
--- SUPPLIES ---							
10.600	Instructional Supplies - INSTRUCTION			\$18,720			\$14,040
10.641	Textbooks - INSTRUCTION			\$38,480			\$28,860
21.600	Supplies - STUDENT SUPPORT			\$6,000			\$4,500
22.600	Supplies - INSTRUCTIONAL STAFF SUPPORT			\$1,000			\$500
22.644	Library Books - INSTRUCTIONAL STAFF SUPPORT			\$4,680			\$3,510
22.650	Periodicals - INSTRUCTIONAL STAFF SUPPORT						
22.660	Audio Visual Materials - INSTRUCTIONAL STAFF SUPPORT						
24.600	Supplies - SCHOOL ADMINISTRATION			\$14,040			\$10,530
26.600	Supplies - OPERATION & MAINT OF FACILITIES			\$83,400			\$75,060
31.600	Supplies - FOOD SERVICES			\$1,898			\$1,345
31.630	Food - FOOD SERVICES			\$195,527			\$138,559
45.600	Supplies - New Buildings - BUILDING ACQUISITION & INSTR						
45.641	Textbooks - New Buildings - BUILDING ACQUISITION & INSTR						
45.644	Library Books-New Libraries - BUILDING ACQUISITION & INSTR						
	TOTAL - ALL SUPPLIES (600)			\$363,746			\$276,905
--- PROPERTY ---							
10.700	Property (Instructional Equipment) - INSTRUCTION			\$34,896			\$26,172
21.700	Property - STUDENT SUPPORT SERVICES						
22.700	Property - INSTRUCTIONAL STAFF SUPPORT						
24.700	Property - SCHOOL ADMINISTRATION			\$4,160			\$3,120
26.700	Property - OPERATION & MAINT OF FACILITIES			\$4,160			\$3,120
31.700	Property - FOOD SERVICES						
31.780	Depreciation - Kitchen Equipment Depreciation - FOOD SERVICES						
45.710	Land and Improvements						
45.720	Buildings						
45.731	Machinery						
45.732	School Buses						



45.733	Furniture and Fixtures						
45.734	Technology Equipment						
45.735	Non-Bus Vehicles						
45.739	Other Equipment						
	TOTAL - ALL PROPERTY (700)			\$43,216			\$32,412
--- OTHER OBJECTS ---							
10.800	Other Objects- INSTRUCTION			\$1,000			\$750
21.800	Other Objects- STUDENT SUPPORT SERVICES						
22.800	Other Objects- INSTRUCTIONAL STAFF SUPPORT						
24.800	Other Objects- LOAN PAYMENT			\$70,200			\$70,200
26.800	Other Objects - OPERATION & MAINT OF FACILITIES			\$5,000			\$1,000
31.800	Other Objects - FOOD SERVICES						
45.800	Other Objects - BUILDING ACQUISITION & INSTR						
	TOTAL - ALL OTHER OBJECTS						
10.810	Dues and Fees - INSTRUCTION						
21.810	Dues and Fees - STUDENT SUPPORT SERVICES						
22.810	Dues and Fees - INSTRUCTIONAL STAFF SUPPORT						
24.810	Dues and Fees -SCHOOL ADMINISTRATION			\$4,992			\$3,744
26.810	Dues and Fees - OPERATION & MAINT OF FACILITIES						
	TOTAL - ALL DUES AND FEES						
	TOTAL - OTHER OBJECTS (800)			\$81,192			\$75,694
	Total Building Acquisition & Instruction (4500)			\$87,192			\$77,444
830	Interest			\$0			\$0
840	Redemption of Principal			\$0			\$0
	Total other financing sources (uses) and other items			\$0			\$0
1000	Total Local			\$301,860			\$226,395
3000	Total State			\$5,225,370			\$3,967,193
4000	Total Federal			\$274,673			\$206,005
	TOTAL REVENUES			\$5,801,903			\$4,399,593
100	Salaries			\$2,396,477			\$1,743,260
200	Employee Benefits			\$569,669			\$389,106
300	Purchased Professional and Technical Services			\$839,300			\$575,175
400	Purchased Property Services			\$1,078,500			\$1,078,500
500	Other Purchased Services			\$20,000			\$20,000
600	Supplies			\$363,746			\$276,905
700	Property			\$43,216			\$32,412
800	Other Objects			\$81,192			\$75,694
	TOTAL EXPENDITURES			\$5,392,100			\$4,191,052
	Excess or Deficiency of Revenues over Expenditures			\$409,803			\$208,541
	Other Sources of Funding (5000)			\$387,835			\$255,097
	Net Asset Balance (Fund Balance)			\$797,638			\$463,638
	Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)			14%			11%
	Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)			7%			5%
	Necessary Closure Fund (2 months Purch Prop Serv + Other)			\$193,282			\$192,366



CHARTER SCHOOL WORKSHEET

FY 2013-2014

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

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	104	0.55	57.2
Estimated ADM (1-3)	312	0.9	280.8
Estimated ADM (4-6)	312	0.9	280.8
Estimated ADM (7-8)	104	0.99	102.96
Estimated ADM (9-12)	0	1.2	0
Special Ed Pre-School	0		
Special Ed ADM (K)	10.4		
Special Ed ADM (1-12)	72.8		
Special Ed (Self-Contained)	4		
Number of Teachers (K-6)	32		
Number of Teachers (7-12)	5		
WPU Value	\$2,986	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	39		
School Administrators (CACTUS)	4		
Prior Year WPUs	721.76		
Low Income Students-prior year	180.44		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	721.7600	\$ 2,155,154
Professional Staff	0.05700	41.1403	122,844
Restricted Basic School:			
Special Ed--Add-on	1.0000	82.5200	219,421
Spec. Ed. Self-Contained	1.0000	4.0000	11,944
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		208,566
Total WPU Programs		849.4203	\$ 2,717,928
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 31,964
Special Populations			
Enhancement for At-Risk Students	\$35.36 per student		29,420
Enhancement for Accelerated Students	\$6.65 per student		5,533
Other			
School Land Trust Program	\$41 per student		29,592
Reading Achievement Program	\$15.33 per student-Guarantee Program		6,377
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		83,200
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		203,385
ESA-School Administrators	\$3,104 per qualified administrator		12,416
Library Books and Resources	\$0.98616 per student	836	824
Local Replacement Dollars	Average \$1,689 per student		1,412,004
Total Non-WPU			\$ 1,814,715
One Time			
Teacher Materials/Supplies ^{1,2}	\$180 per eligible F.T.E.	325	5,760900



Total One Time		\$	6,660
ESTIMATED Total All State Funding		\$	4,539,303
¹ Steps one through three get \$250; steps four or higher get \$175			
² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Cathy Dudley @ 538-7667		Updated 04-09-13	

CHARTER SCHOOL WORKSHEET

FY 2013-2014

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

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	78	0.55	42.9
Estimated ADM (1-3)	234	0.9	210.6
Estimated ADM (4-6)	234	0.9	210.6
Estimated ADM (7-8)	78	0.99	77.22
Estimated ADM (9-12)	0	1.2	0
Special Ed Pre-School	0		
Special Ed ADM (K)	7.8		
Special Ed ADM (1-12)	54.6		
Special Ed (Self-Contained)	4		
Number of Teachers (K-6)	25		
Number of Teachers (7-12)	4		
WPU Value	\$2,986	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	31		
School Administrators (CACTUS)	6		
Prior Year WPUs	541.32		
Low Income Students-prior year	135.33		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	541.3200	\$ 1,616,365
Professional Staff	0.05700	30.8552	92,133
Restricted Basic School:			
Special Ed--Add-on	1.0000	62.8900	167,225
Spec. Ed. Self-Contained	1.0000	4.0000	11,944
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		156,424
Total WPU Programs		639.0652	\$ 2,044,091
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 24,048
Special Populations			
Enhancement for At-Risk Students	\$35.36 per student		22,065
Enhancement for Accelerated Students	\$6.65 per student		4,150
Other			
School Land Trust Program	\$41 per student		29,592
Reading Achievement Program	\$15.33 per student-Guarantee Program		4,783
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		62,400
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		161,665
ESA-School Administrators	\$3,104 per qualified administrator		18,624



Library Books and Resources	\$0.98616 per student	628	619
Local Replacement Dollars	Average \$1,689 per student		1,060,692
Total Non-WPU			\$ 1,388,638
One Time			
Teacher Materials/Supplies ^{1,2}	\$180 per eligible F.T.E.	25 4	4,500 720
Total One Time			\$ 5,220
ESTIMATED Total All State Funding			\$ 3,437,949
¹ Steps one through three get \$250; steps four or higher get \$175			
² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Cathy Dudley @ 538-7667			Updated 04-09-13

CHARTER SCHOOL WORKSHEET

FY 2013-2014

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

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	104	0.55	57.2
Estimated ADM (1-3)	312	0.9	280.8
Estimated ADM (4-6)	312	0.9	280.8
Estimated ADM (7-8)	208	0.99	205.92
Estimated ADM (9-12)	0	1.2	0
Special Ed Pre-School	0		
Special Ed ADM (K)	10.4		
Special Ed ADM (1-12)	72.8		
Special Ed (Self-Contained)	4		
Number of Teachers (K-6)	34		
Number of Teachers (7-12)	9		
WPU Value	\$3,076	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	39		
School Administrators (CACTUS)	4		
Prior Year WPUs	685.672		
Low Income Students-prior year	180.44		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	824.7200	\$ 2,536,467
Professional Staff	0.05700	47.0090	144,579
Restricted Basic School:			
Special Ed--Add-on	1.0000	82.5200	219,421
Spec. Ed. Self-Contained	1.0000	4.0000	12,302
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		234,636
Total WPU Programs		958.2490	\$ 3,147,405
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 36,059
Special Populations			
Enhancement for At-Risk Students	\$35.36 per student		33,097
Enhancement for Accelerated Students	\$6.65 per student		6,224



Other			
School Land Trust Program	\$41 per student		30,480
Reading Achievement Program	\$15.33 per student-Guarantee Program		6,377
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		93,600
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		203,385
ESA-School Administrators	\$3,104 per qualified administrator		12,416
Library Books and Resources	\$0.98616 per student	940	927
Local Replacement Dollars	Average \$1,689 per student		1,587,660
Total Non-WPU			\$ 2,010,225
One Time			
Teacher Materials/Supplies ^{1,2}	\$180 per eligible F.T.E.	34 9	6,120 1,620
Total One Time			\$ 7,740
ESTIMATED Total All State Funding			\$ 5,165,370
¹ Steps one through three get \$250; steps four or higher get \$175			
² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Cathy Dudley @ 538-7667 Updated 04-09-13			

CHARTER SCHOOL WORKSHEET

FY 2013-2014

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

School Name

TEMPLATE

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	78	0.55	42.9
Estimated ADM (1-3)	234	0.9	210.6
Estimated ADM (4-6)	234	0.9	210.6
Estimated ADM (7-8)	156	0.99	154.44
Estimated ADM (9-12)	0	1.2	0
Special Ed Pre-School	0		
Special Ed ADM (K)	7.8		
Special Ed ADM (1-12)	54.6		
Special Ed (Self-Contained)	4		
Number of Teachers (K-6)	31		
Number of Teachers (7-12)	4		
WPU Value	\$3,076	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	31		
School Administrators (CACTUS)	6		
Prior Year WPUs	541.32		
Low Income Students-prior year	135.33		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	618.5400	\$ 1,902,350
Professional Staff	0.05700	35.2568	108,434
Restricted Basic School:			
Special Ed--Add-on	1.0000	62.8900	167,225
Spec. Ed. Self-Contained	1.0000	4.0000	12,302
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$250.68 per K-8 ADM		175,977
Total WPU Programs		720.6868	\$ 2,366,288



Non-WPU Programs			
Related to Basic Programs: Flexible Allocation-WPU Distribution	\$37.63 per WPU		\$ 27,119
Special Populations Enhancement for At-Risk Students	\$35.36 per student		24,823
Enhancement for Accelerated Students	\$6.65 per student		4,668
Other School Land Trust Program	\$41 per student		29,592
Reading Achievement Program	\$15.33 per student-Guarantee Program		4,783
	\$1.49 per K-3 student		-
	\$30.82 per low income student		-
Charter Administrative Costs	\$100 per student		70,200
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		161,665
ESA-School Administrators	\$3,104 per qualified administrator		18,624
Library Books and Resources	\$0.98616 per student	706	696
Local Replacement Dollars	Average \$1,689 per student		1,192,434
Total Non-WPU			\$ 1,534,605
One Time Teacher Materials/Supplies ^{1,2}	\$180 per eligible F.T.E.	31 4	5,580 720
Total One Time			\$ 6,300
ESTIMATED Total All State Funding			\$ 3,907,193
¹ Steps one through three get \$250; steps four or higher get \$175			
² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Cathy Dudley @ 538-7667			Updated 04-09-13

