Jordan School District

Charter School Application

All information requested in this document is required. Deletion or omission of information will delay review of this application by the Board of Education until all information is completed.

If granted, a school charter granted by Jordan School District Board of Education is valid for no more than three (3) years. At which time the Charter School must request to the Jordan School District Board of Education that the Charter be extended for another three (3) year period.

Name of Proposed Charter School: Summit Academy

Address of Proposed Charter School: TBD

Date Application Submitted to District: Original Submission – 11 Apr 2003
New Application Submission – 8 May 2003
Jordan School District

Applicant Information

The applicant is the person authorized to act on behalf of the proposed charter school. The Jordan School District will address all of its correspondence and communication to the applicant. The applicant may represent an individual, group, or organization; if a group or organization, please provide a description. If the space provided on this form is not sufficient, please place the description in an appendix and reference the appendix here.

Name: CherryLee P. Morgan
Address: 522 High Berry Lane
City: Draper
State: Utah
Zip: 84020
Daytime Phone: (801) 523-2336
Fax: n/a
Email Address: cherry.morgan@byu.net

Description of Group or Organization:

“The Founding Council consists of those individuals responsible for originating Summit Academy. The council defines and shapes the school’s vision, purpose, and core policy.”
Information Regarding Proposed Charter School

Please provide the requested information about the proposed charter school. If the information is not yet available, please indicate by writing N/A in the space provided. Use the section "Conversion of an Existing Public School" only if the proposed charter school involves such a conversion.

Name: Summit Academy
Address: N/A
City: N/A
State: Utah
Zip: N/A
Phone: N/A
Fax: N/A
Website: http://summitcharteracademy.com
Address:
School District: Jordan School District
Date School Will Begin: N/A
Grade Level or Student Ages To Be Served: K-6
Number of Students To Be Served: 175-525

Conversion of an Existing Public School:
1. Before gathering names for a petition to convert an existing school to a charter school, you must declare your intent in person or in writing to the Jordan School District Board of Education. The Board of Education will have up to 30 days to identify a companion school for patrons to attend if the charter school petition receives the required number of signatures.
2. The required number of signatures as prescribed in 53A-1A-504 must be obtained before the Jordan School District Board of Education will consider the application.
Name of Public School:

Is the Entire School to Become a Charter School?

_____ Yes

_____ No
School Governance

1. Administrative Structure

Principles of Administration

Summit Academy administration policies are governed by three fundamental principles:

Stakeholder Representation – All school stakeholders are entitled to participate in the decision-making process. Examples of stakeholders include students, parents, founding and advisory council members, staff, and district representatives.

Open Proceedings – To the fullest extent possible and in compliance with the spirit and letter of Utah State Law, administrative activities shall be open to all stakeholders. Exceptions are limited to a discrete class of activities in which privacy rights must be honored.

Cooperative Posture with Jordan School District – Summit Academy shall serve as a model of cooperation between members of the school community and members of the sponsoring school district. This includes frequent consultation, visits, open communication via the school’s web site and reviews by invitation beyond the mandates of State or District Code. We believe that a cooperative, not competitive, stance will encourage academic freedom and ensure the highest educational experience for the students.

Summit Governing Organizations

This section outlines the school’s administrative configuration and the mandate of those individuals and organizations entrusted to lead and manage the school. The Summit Founding Council is the “keeper of the vision” and defines curriculum and core policy. The Summit Advisory Council offers recommendations and assists in implementing the vision. The Summit School Board is responsible for daily operation of the school, hiring faculty and staff, and coordinating volunteer efforts. The Summit Parent Organization offers interested parents a means to participate in defining school policy. All members of the School Board are elected from the Parent Organization. The Summit Student Council brings student suggestions and ideas to the attention of the Founding Council and School Board. The Summit Community Forum consists of District and community representatives who offer suggestions, constructive criticism, and other feedback designed to improve the Summit educational experience.

For detailed policies regarding these organizations, please refer to the Summit Academy Handbook.
Summit Founding Council

The Founding Council initially consists of those individuals originating Summit Academy. The council defines and shapes the school’s vision, purpose, and core policy. Future council members shall uphold the principles upon which the school is established. Initial members of the Summit Founding Council are:

- CherryLee Morgan, Draper, Utah
- Coreen A. Smiley, Draper, Utah
- Craig A. Johnson, Draper, Utah

Some of the responsibilities of the Founding Council may include:

- Authoring the official charter.
- Amending the charter, in partnership with Jordan School District officials.
- Creating and administering the Summit Advisory Council. This includes appointing and removing council members.
- Defining initial Summit School Board policy.
- Authoring and approving Summit internal policies (e.g., “bylaws”).
- Defining and communicating school core values, principles, and policy as defined in the Summit School Handbook.
- Approving appointments to key administrative positions. These include the Principal, Assistant Principal, and Curriculum Director.
- Signing district assurances documents and honoring other legal commitments as required by state and district code.
- Renewing employment contracts for Summit employees.

Summit Advisory Council

The Summit Advisory Council is a group of “specialist volunteers” who advise the Founding Council and perform assignments to fulfill specific objectives of the charter.

Prior to the school’s first year of operation, the council shall be designated as the Summit Founding Advisory Council. Some of the council’s responsibilities may include:

- Offering advice to the Founding Council, based on the members’ professional expertise.
- Providing oversight to the Founding Council on policy decisions. The council’s contribution is especially significant in educational, legal, ethical, and financial matters.
- Assisting the Summit School Board in fulfilling their responsibilities.

Summit School Board

The Summit School Board oversees school operation. It is comprised of 5 parents whose children are registered to attend the school. The board’s responsibilities may include:

- Defining operational school policy.
• Hiring faculty and staff (Founding Council members must approve the selection of the Principal, Assistant Principal, and Curriculum Director).
• Overseeing school finances.
• Overseeing school procurements.
• Overseeing school facilities management.
• Approving school volunteer participation.
• Assisting in district and state reporting responsibilities.
• Calling for and holding elections to fill vacancies in the board.
• Ensuring that required assessments take place.

Summit Parent Organization

The Summit Parent Organization comprises the parents whose students are registered to attend Summit Academy. Some of the responsibilities of the organization may include:
• Organizing and maintaining the Enhancement program.
• Coordinating the efforts of volunteers for classroom help, class activities, field trips, assemblies, and other volunteer-based activities.
• Raising funds for supplementary materials and activities.
• Organizing an annual “uniform exchange.”
• Organizing elections to fill vacancies in the Summit School Board.

Summit Student Council

The Summit Student Council offers students meaningful and fun opportunities to participate in school operations. Any student may join the student council. At the beginning of each school year, members of the student council shall elect 1 representative from each grade 4-6. These representatives will meet monthly with the Student Council coordinator. The coordinator shall be a member of the Parent Organization and shall be appointed by the school board each year. The student council may be asked to fulfill specific assignments under the direction of the principal. At the coordinator’s discretion, the student council representatives and the coordinator may attend school board meetings and offer policy suggestions.

Summit Community Forum

At the request of the Founding Council, a Summit Community Forum shall be held. This forum is an opportunity for district and community members to tour, advise, inform, or otherwise participate in school operations. Examples of forum proceedings include:
• School “open house” nights.
• Press Conferences.
• Forum meetings focused on specific topics (e.g., curriculum improvement, technology).
2. Governing Board

Traditional Governing Board commitments shall be honored by the Summit School Board (see Question 1). Members of the Summit School Board are elected representatives of the Summit Parent Organization. Each school board member serves a term of no more than two (2) years. There are five (5) members of the board. When a vacancy arises, the Summit School Board calls for an election. The Parent Organization notifies its members of the vacancy and requests applications. An open meeting shall be held where applicants may present themselves to the parents. They are then voted on at the meeting by silent ballot. Those receiving the most votes are invited to serve on the board. Upon their acceptance, they shall declare, in writing, their intent to uphold the principles of Summit Academy and to fulfill their responsibilities as a member of the board.

3. Chief Administrative Officer

At the time of this writing, Summit Academy has not selected a Chief Administrative Officer. Upon acceptance of the charter and subsequent incorporation, Summit Academy shall conduct a search for qualified candidates.

The Summit Chief Administrative Officer shall be designated as the Principal of Summit Academy. The principal manages the school’s daily operation. The Principal is subject to policy defined by the Summit School Board and Summit Founding Council. The principal is a key representative of the school, and, as such, bears the considerable responsibility of upholding school standards and values at all times.

Specific responsibilities of the principal may include:
- Serving as an ex-officio member of the Summit School Board.
- Recommending policy changes to the School Board.
- Recommending changes to school personnel.
- Promoting and overseeing school curriculum.
- Representing the school in public relations events.
- Providing arbitration services between parents and teachers (see School Governance – Complaints).
- Overseeing school finances.

4. Parent Involvement

The participation of Summit Academy parents is critical to the success of the school. It is acknowledged that many parents will choose Summit Academy largely because of the increased opportunity for significant involvement in defining school policies and manners of instruction. Given these considerations, many exciting and fulfilling opportunities exist for parents to contribute. A subset of these opportunities may include:
- Participating in the Summit Parent Organization.
• Serving on the Summit School Board.
• Serving on the Summit Advisory Council.
• Participating in the Summit Enhancement Program (See Curriculum and Instruction – Curriculum).
• Coordinating the efforts of volunteers for classroom help, class activities, field trips, assemblies, and other volunteer-based activities.
• Organizing the annual “Uniform Exchange”.
• Assessing and expressing the viewpoints of member parents on policy issues.

To help parents fulfill their important role, Summit Academy requests parents to:
• Read the Summit Academy Handbook and agree to abide by its terms.
• Inform the school community of professional experience they may have.
• Sign up for school volunteer time.

5. Communication with Parents

Parents and other members of the Summit Community will have opportunities to receive notifications through personal interactions, class and school correspondence, and through the Summit Information System (SIS). SIS services will be available through the Internet, and, at a time in the future, telephony and interactive voice response systems. Examples of notifications may include:
• Requests for volunteer participation.
• School extracurricular events.
• School board meetings or other official events.
• Vacancies in school organizations.
• Employment opportunities.
• Community events of interest.
• Standardized assessments and results.

The frequency of official correspondence shall be at the discretion of the school board, principal, and parent organization. When seeking to communicate officially, governing organizations shall abide by established procedures as defined in the Summit Academy Handbook.

Regarding parent complaints, the issue management process at Summit Academy is guided by simple principles:
• Students, Parents, Teachers, and Administrators shall be treated with respect.
• The best interest of the students shall guide the proceedings.
• Complaints should normally be resolved by those parties directly involved. For example, a parent complaint with a teacher should be resolved between the parent and teacher directly. If difficulties arise, the parent and teacher should attempt to resolve the issue with the principal. The school board and founding council may be called upon as detailed in the Summit Academy Handbook.
Students

1. Notification

Upon acceptance of the charter, an awareness campaign shall be initiated to inform the community of the new school. Specific tenets of this campaign may include:

- Recruiting members of the Advisory Council.
- Holding public meetings to introduce parents to the school and to receive applications.
- Mass media releases.
- Website creation and search engine population.

2. Selection

Enrollment is open to all students according to state and district code. For a detailed algorithm of the selection process, please consult the Summit Academy Handbook.

Selection Overview

- All students whose names appear on an official school enrollment form received and dated by the Founding Council shall be considered candidates for enrollment.
- The official enrollment form may be mailed, e-mailed, or delivered to the Council. The council shall notify the parents of acceptance of the form. Parents should not consider the application process complete until they receive official notification from the council.
- Students of Founding Council members shall be designated as council enrollees.
- Students of Staff members shall be designated as staff enrollees.
- Students of Advisory Council members shall be designated as priority applicants.
- All applicants who are non-council enrollees and non-priority applicants shall be designated as standard applicants.

Enrollment Summary:
- Council Enrollees and Staff Enrollees are guaranteed enrollment.
- Existing students are selected by lottery.
- Priority applicants are selected by lottery.
- Standard applicants are selected by lottery to fill the remaining openings.

**Should Summit Academy be approved for fall of 2003, The Academy may make use of temporary buildings to be located in the SunCrest Community. SunCrest has communicated a desire to negotiate land and buildings due to hardship conditions wherein SunCrest students must be driven to a location then bussed 20 minutes away to the nearest school. Should Summit Academy open in 2003 and use SunCrest facilities, we seek to grant additional priority status for SunCrest residents that shall not exceed 20% of the school’s population.**
3. Standards

Student conduct shall be subject to the usual and customary guidelines set forth by the Jordan School District. More detailed student conduct may be enforced by the Summit School Board.

Students will be required to wear uniforms. An acceptable uniform and dress code policy shall be drafted by the Founding Council and upheld by the Summit School Board. Parents shall be notified of uniform requirements prior to enrollment.

For more detailed information regarding student achievement standards, please consult the Summit Academy Handbook.

4. Dismissal

Dismissal guidelines and processes shall be in accordance with those set forth by the Jordan School District. All applicable statutes regarding due process will be upheld in the school’s practices regarding dismissal.
Staff

1. Screening and Selection

Summit Academy leadership seeks innovative, dynamic, professional faculty members to educate its students. Summit Academy will provide a motivating environment to give its faculty the opportunity to learn the chosen curricula and to employ innovative teaching methods.

It is the goal of the Founding Council to appoint at least one individual with significant, professional HR experience to the Summit Advisory Board. This advisor shall assist the council in drafting a comprehensive employment, compensation, and benefits policy.

The Summit School Board shall be responsible for recruiting, screening, and interviewing candidates for faculty and staff positions. The Founding Council will approve the selection of the Principal, Assistant Principal, and Director of Curriculum positions. The Principal will advise the other school board members during the interviewing and staff selection process.

Appropriate background checks shall be undertaken for any prospective employees in accordance with state and district code.

Summit Academy affirms that it shall not discriminate against any employee on the basis of race, creed, color, gender, national origin, religion, ancestry, age or disability in its recruitment, selection, training, utilization, termination or other employment-related activities.

2. Qualifications

Summit Academy seeks applicants for teaching positions possessing some or all of the following skills and/or experience:

- Prior teaching experience, especially within the chosen curricula.
- A demonstrated commitment to learn new curricula, as well as to propose improvements.
- Confidence in managing volunteer efforts and junior-level instructors.
- Demonstrated use of technology, both as a learning tool and to manage classroom activities.
- Additional certifications, degrees, or training relevant to elementary education.

Instructors and other staff members at Summit Academy should have experience in one or more of the following areas:

- Leading instruction sessions in the chosen curricula.
- Teaching and adapting instruction to young children.
- Certifications in specific curriculum instruction.

Prior to initiating the staff selection process, a detailed employment application shall be drafted in cooperation with the HR advisor on the Advisory Council.

3. Staffing Patterns

- Class size for the founding year shall not exceed 30 students per K-6 grade and is targeted for 25 students per class.
- Minimum student capacity is 175 students, equivalent to 1 class per grade. Maximum capacity is 525 students, equivalent to 3 classes per grade.
- The school shall hire 1 teacher per class and up to 1 instructor per grade level.
- The core subjects of Math, Reading, and Spelling & Writing shall be achievement-grouped, potentially spanning grades. Each group is targeted to contain 8-13 students.
- "Enhancement" sessions (see Curriculum and Instruction) shall be administered by the Parent Organization. Teachers, instructors, and staff members may also participate.
- If budget constraints allow, the school shall hire a dedicated technology instruction specialist. This individual will assist other staff members in using technology, oversee the technology lab, and honor teachers' requests to lead technology instruction sessions with their students.

4. Teaching Schedule

- Teachers will receive instructional/curriculum in-service prior to the opening of school each year.
- Students of Summit Academy will receive 990 hours of instruction as per state law.
- Class will be dismissed early one day each week for the purpose of teacher preparation, inservice, parent conferences, staff meetings, etc.
- Formal Parent/Teacher conferences will be held twice each year.
Curriculum and Instruction

1. Purpose

Summit Academy’s mission is to provide a quality education to elementary-age students emphasizing academic fundamentals, dynamic student-teacher interaction, and the discovery of each student’s unique talents and interests. Parent, teacher, and staff innovation is encouraged and sought after in both instruction and policy.

The school provides a balanced learning approach, encompassing mastery of academic fundamentals, extracurricular activities, technology instruction, and a unique enhancement program giving parents and educators increased opportunities for specialized instruction.

2. Curriculum

It is the intent of Summit Academy to provide each student with a balanced education. Students who master fundamentals are able to use that knowledge to make evaluations, draw conclusions, and acquire higher-order thinking skills. Those skills are then applied during specialized knowledge acquisition. To accomplish these objectives, the initial curriculum is planned around the following programs:

Core Knowledge

E.D. Hirsch’s Core Knowledge consists of a coherent, sequenced body of knowledge designed to prepare students to develop higher-order thinking skills. Each student builds on their foundation of knowledge, gaining specific insights from year to year. Subjects may include Language Arts, Science, History, Geography, Visual Arts, and Music.

Direct Instruction

Direct Instruction (DI) methodology aligns with the Core Knowledge model of explicit, incremental, and sequential instruction. It includes the following:

- Field-tested reading, spelling, language arts, and math programs.
- Interactive lessons require frequent verbal responses from students.
- Teachers monitor and correct errors immediately.
- Lessons are presented to small groups of students.
- Students are grouped by performance level.
- Frequent assessment of student progress gives parents and teachers targeted feedback.
- Presentation books provide for maximum effectiveness and efficiency during instruction.

(Reproduced in part from the SRA web site)
Saxon Math

The Saxon Math approach is incremental, sequential, and comprehensive. Topics are continually reviewed during the year as students master basic concepts then add more complexity.

Enhancement Program

Enhancement is a unique, volunteer-based program where specialized subjects are taught in small groups. Structured lesson plans of 4 or 8 weekly sessions are submitted by parents, teachers, staff, or other community members. The Enhancement committee reviews and approves lessons. Several Enhancement options are made available to the students, who register for specific subjects based on their interest or aptitude.

The Enhancement program offers parents opportunities for targeted, meaningful involvement in the educational process. It presents students with experiences in new and diverse subjects. The Enhancement program provides concise, specific instruction on topics that complement the core curriculum. It is anticipated that a 30-45 minute session once per week will meet the objectives of the program.

Other – Supplemental Curriculum will be added as needed and may include the following:
- Technology
- Art
- Physical Education

3. Calendar

Summit Academy intends to be a traditional school and follow the general school calendar from the district in which it resides.

The Academy will meet the state requirements of 180 days and 990 hours of instruction per school year.

4. Extracurricular Activities

Summit Academy may provide field trips throughout the year for each class. Parents will be notified in advance and may be asked to volunteer for staffing or transportation.

Summit Academy may provide after-school activities based on parent and student interest. Such activities may include but are not limited to:
- Choir
- Band
• Orchestra
• Athletics

Field trips and extracurricular activities shall be reviewed and approved by the School Board on a case-by-case basis.
Student Assessment

1. Instruments and Procedures

Summit Academy will comply with the state testing schedule for the SAT9 and the CRT. Summit Academy’s core curriculum revolves around mastery of fundamental subjects. To assess mastery, Academy staff will implement assessments based on Core Knowledge, Direct Instruction, and Saxon Math standards. The frequency of these assessments will be based on the pace and level of each Achievement Group and/or grade.

2. Reporting and Use

Testing results will be reported to the district and state as required by law. Parents shall be notified of all results and invited for Parent/Teacher consultations. A committee of parents, administration, and board members shall collect data, provide statistical results, and review the overall results of the students. These results shall be reported to the school board, founding council, and members of the Advisory board.

Upon the full implementation of the Summit Information System (SIS), parents may track the achievement and mastery of their students via a secure Internet site.
Finances and Reporting

1. Start-up Funds

Summit Academy will apply for state start-up funds set aside to aid new charter schools for the first five years of operation. We will also request any and all current or future funds set aside by the state for Charter School use. The Academy will seek additional funding through such sources as public and private grants, corporate sponsors, and fundraising.

Summit Academy reserves the right to make budget modifications, cutbacks in administration, etc., should these funds not become available.

2. Revenues and Expenditures

Please see the attached Summit Academy 3-5 Year Budget Plan.

3. Accounting Policies and Procedures

Summit Academy will follow the State Office of Education’s guidelines for accounting, reporting and auditing of Utah Schools. Financial reporting will be in compliance with Generally Accepted Accounting Principles (GAAP).

Disbursements from the Academy’s operational accounts will require the signature of the Principal and the designated School Board Treasurer. Both signatories will be accountable to the Summit School Board and Founding Council.

Monthly accounting reports (revenue, expenditures, balance sheet, etc.) shall be presented to the School Board for review.

The Academy reserves the right to contract out services that may include bookkeeping/accounting, payroll, benefits, etc.

The Academy’s fiscal year will run concurrently from July 1st to June 30th.

4. Insurance

Summit Academy shall maintain liability insurance as required by state or district code. The Academy may choose to contract through Utah State Risk Management.
5. Fees

Summit Academy shall comply with standard district regulations regarding the collection of fees.

Summit Academy students will be required to purchase uniforms as set forth in the “Standards” section (9).

6. Responsibility

The Principal will be responsible for filling out and submitting reports to the State Board as set forth in the Utah Charter School Act.

Summit Academy agrees to participate in an independent yearly audit by a certified public accountant of all its financial and administrative operations. Results from this audit will be reviewed by the Summit School Board, submitted according to state law, and available upon request.
Support Services

1. Transportation

Summit Academy will not provide transportation services for students. The Summit Parent Organization may assist in organizing carpools.

2. Food Services

Summit Academy will not initially sponsor school breakfast or lunch services. Students will be expected to bring their lunch to school. This policy is subject to change by enactment of the Summit School Board.

3. Health and Safety

Summit Academy will contract custodial services and parent volunteers will help to maintain the facility. The Academy will adhere to all state health and safety codes and inspections prior to facility occupancy.

4. Emergencies

Summit Academy will hold fire and natural disaster drills according to district policy.

In the event of serious or life-threatening injury, Emergency Services shall be summoned immediately and parents/guardians will be notified.

Each student is required to submit a health record to the school describing any health concerns. Identified concerns will be marked and teachers and staff will be given appropriate training should they be required to assist in an emergency.

In the case of an emergency, first aid, or illness, parents/guardians will be contacted immediately.
Appendix A - Summit Academy 3-5 Year Budget Plan.

WPU = $2,150  
# of Students 1-6 = 300  
# of Kindergartners = 50

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<p>| <strong>Expenditures</strong> |        |        |        |        |        |
| Personnel |        |        |        |        |        |
| Principal | 50,000 | 51,500 | 53,045 | 54,636 | 56,275 |
| Vice Principal | 30,000 | 30,900 | 31,827 | 32,782 | 33,765 |
| School Secretary | 25,000 | 25,750 | 26,523 | 27,319 | 28,138 |
| Curriculum Implementation Specialist | 30,000 | 30,900 | 31,827 | 32,782 | 33,765 |
| Teachers (14 @ $30,000) | 420,000 | 432,600 | 445,578 | 458,045 | 472,714 |
| Instructors (14 @ $140/day for 184 days) | 103,040 | 103,040 | 103,040 | 103,040 | 103,040 |
| Substitutes (85 days @ $65/day) | 5,525 | 5,525 | 5,525 | 5,525 | 5,525 |
| Payroll Tax @ 7.9% | 51,985 | 53,301 | 54,655 | 56,091 | 57,488 |
| Workers Compensation | 1,200 | 1,200 | 1,200 | 1,200 | 1,200 |
| Unemployment Insurance | 2,000 | 2,000 | 2,000 | 2,000 | 2,000 |
| Retirement Benefits | 70,997 | 69,681 | 68,327 | 66,931 | 65,494 |
| Health Insurance | 60,000 | 60,000 | 60,000 | 60,000 | 60,000 |
| Other Benefits @ 4.1% | 28,980 | 27,662 | 28,365 | 29,090 | 29,836 |
| <strong>Facility</strong> |        |        |        |        |        |
| Facility Improvements | 0 | 0 | 0 | 0 | 0 |
| Building &amp; Land Lease ($20,000/month) | 240,000 | 240,000 | 240,000 | 240,000 | 240,000 |
| Utilities (@$2,000/month) | 24,000 | 24,000 | 24,000 | 24,000 | 24,000 |
| Telephone &amp; Internet | 3,900 | 3,900 | 3,900 | 3,900 | 3,900 |
| Insurance (Liability, Property, etc.) | 7,000 | 7,000 | 7,000 | 7,000 | 7,000 |
| Building Repairs | 2,000 | 4,000 | 4,000 | 4,000 | 4,000 |
| Custodial Services ($50/day for 184 days) | 9,200 | 9,200 | 9,200 | 9,200 | 9,200 |
| Custodial Supplies (Bathroom Supplies, Cleaning Supplies) | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 |
| Ground Maintenance &amp; Improvements | 5,000 | 5,000 | 5,000 | 5,000 | 5,000 |
| <strong>Supplies and Materials</strong> |        |        |        |        |        |
| Textbooks | 150,000 | 50,000 | 20,000 | 20,000 | 20,000 |
| Workbooks | 20,000 | 20,000 | 20,000 | 20,000 | 20,000 |
| Academic Supplies (Paper, Art, Music, etc. @$2,000/class) | 28,000 | 28,000 | 28,000 | 28,000 | 28,000 |</p>
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25,244 139,006 279,915 272,435 246,016
Jordan School District

Charter School Assurances

Carefully review each of the assurance items and then have the chief administrative officer of the proposed charter school sign this document.

The applicant charter school hereby assures and certifies to the Jordan School District Board of Education that:

A. The charter school will make provisions for such fiscal control and fund accounting procedures as may be necessary to assure proper disbursement and accounting of all funds, including a monthly submission of a financial report of revenue, expenditures, and student enrollment.

B. The charter school will maintain a clear, written procedure and process for auditing school finances as per the requirements of the Jordan School District.

C. The charter school gives the Jordan School District, the Utah State Office of Education, or the U.S. Comptroller General, through any authorized representative, the access to, and the right to, examine all records, papers, or other documents related to all funds, including the submission of reports as may be required.

D. The charter school will provide written evidence of liability and other appropriate insurance coverage, including a description of the levels of coverage and the relationship of this coverage to local and state agency obligations.

E. The charter school will make such reports, including reports of evaluations, in such form and containing such information as the Jordan School District Board of Education or the State Superintendent of Public Instruction may reasonably require to carry out their legislative functions and to determine the extent to which funds have been effective in carrying out legislative purposes and project objectives.

F. The charter school will comply with appropriate rules, regulations, and state guidelines except as specifically waived by the Jordan Board of Education and the Utah State Board of Education, and effective control will be maintained over, and accountability provided for, all funds, property, and other assets. The charter school will also adequately safeguard all public property and shall assure that it is used solely for authorized purposes.

G. All physical assets purchased with public funds become the property of the Jordan School District upon the termination of the charter school.

H. The charter school will comply with the requirements of the Family Educational Rights and Privacy Act of 1974.

I. The charter school will comply with Title VI of the Civil Rights Act of 1964 prohibiting discrimination in program benefits, participation, employment, or treatment on the basis of race, color, or national origin,
and in compliance with the provisions of Title IX of the Education Amendments of 1972 prohibiting discrimination on the basis of sex.

J. The charter school assures that no otherwise qualified person shall, on the basis of a disability, be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity that receives or benefits from local, state, or federal financial assistance.

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

L. The charter school will function under an open admission policy on the same basis as other public schools. If the number of students applying to enroll exceeds the capacity of the school or of programs, classes, or grade levels within the school, then those to be admitted shall be chosen at random from among the applicants, within the allowable mandatory and optional preferences specified in Section 53A-la-506, Utah Code Annotated.

M. The charter school assures that it will not conduct a program of instruction until such time as:

1. The requisite health and safety standards for the school building have been met according to the local fire and health department inspectors;
2. Adequate equipment, materials, and guidance and counseling services are available; and,
3. Conditions are adequate to provide for the economical operation of the school with an adequate learning environment.

N. The charter school will comply with all applicable federal and state laws, rules, and regulations regarding the recruitment, screening, selection, and evaluation of all school employees.

O. The charter school will employ the use of the Utah State Core Curriculum as the foundation for the instructional program for the school.

P. The charter school will employ the use of the Stanford Achievement Test Ninth Edition and the Utah State Core Curriculum End-of-Level Tests as a fundamental part of the overall assessment program for the school.

Q. 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.

R. The charter school will operate with a written procedure for student suspension and dismissal, including appeal procedures.

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

T. The charter school will function under the stipulations of a clear, written agreement with the districts of student residence regarding the involvement of students in extracurricular activities and/or interscholastic
activities governed by the Utah High School Activities Association, if such programs are offered.

U. The charter school will not charge tuition or fees, except those fees normally charged to other public schools.

V. The charter school will operate under the provisions of the Utah Open Meeting Law.

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

X. The charter school will submit an appropriately amended application prior to any material change affecting the purpose, administration, organization, or operation of the school.

Y. The filing of this application for charter schools status has been authorized by the governing body acting through its authorized representative identified on the application as the chief administrative officer.

Z. The charter school will only employ educators who hold valid Utah teaching certificates or who meet State Board requirements for alternative certification or authorization.

AA. The charter school will operate under the provisions outlines under the Federal “No Child Left Behind” Act of 2001.

BB. The charter school chief administrative officer shall require criminal background checks on school personnel as outlined in 53A-la-512.5.

CC. The charter school will make a formal presentation annually to the Jordan School District Board of Education in a public meeting showing the academic progress of students in the charter school as defined by state and federal law.

DD. The charter may be terminated during its term for any of the reasons set forth in statute (53A-la-510) or for violation of any of the representations or Assurances made in the application or for violation of any rule or policy of the Jordan School District.

The chief administrative officer 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 and chief administrative officer of the proposed charter school.

Name (type): Craig Johnson
Title (type): Member, founding council
Signature: 
Date: 03 June 2003
April 14, 2003

Summit Academy
C/O CherryLee Morgan
522 High Berry Lane
Draper, Utah 84020

Subject: Charter School Application

Dear Mrs. Morgan:

The Jordan School District Board of Education reviewed your request for consideration of your Charter School Application. Despite the late submission date, the Board is willing to review your application.

The Board of Education is requesting, however, that you complete and resubmit a revised Charter School Application that can be obtained from Sherry Wasden’s office. Her telephone number is 567-8326. The form you have completed is not the District’s updated application. The form was revised prior to your recent submission and has been out for legal review. We anticipate it being ready for you to pick up by the end of next week.

I believe you will be able to directly transfer most of the information you have onto the new application and it should not be cumbersome to complete the requested information in new areas. We will get it to the Board for their review in a timely manner upon submission.

Sincerely,

Barry L. Newbold, Ed.D.

cc: Board of Education
D. Burke Jolley
Sherry J. Wasden
April 10, 2003

Dear Jordan School District:

The following is a submission of the charter school application for Summit Academy. We realize that this application is being submitted after the March 1\textsuperscript{st} deadline. However, we seek the district’s consideration as we are in final negotiations to secure a land donation within the Jordan School District as a temporary site for the year 2003-2004. In addition, plans are underway for a permanent site for the year 2004-2005. By applying at this time, with a temporary location, we believe the establishment of a workable timeline for both the District and Summit Academy may be achieved.

We look forward to working with the Jordan School District and appreciate your consideration.

Kind Regards,

CherryLee Morgan
Summit Academy
UTAH CHARTER SCHOOLS
Application

Name of Proposed Charter School:
    Summit Academy

Local School District:
    Jordan School District

Date Copy of Application Given to Local School District:
    April 2003
UTAH CHARTER SCHOOLS

Applicant

About the Applicant

Name: CherryLee Morgan
Address: 522 High Berry Lane
City: Draper
State: UT
Zip: 84020
Daytime Phone: 523-2336
Fax: N/A
Email Address: Cherry.Morgan@Byu.net

Description of Group or Organization

This application is submitted by the Founding Council for Summit Academy.

Summit Academy’s Founding Council consists of:
- CherryLee Morgan, Draper, Utah
- Coreen A. Smiley, Draper, Utah
- Craig A. Johnson, Draper, Utah

“The Founding Council consists of those individuals responsible for originating Summit Academy. The council defines and shapes the school’s vision, purpose, and core policy.”
## UTAH CHARTER SCHOOLS
### School

**Proposed Charter School**

**Name:** Summit Academy  
**Address:** To Be Determined  
**City:** N/A  
**State:** UT  
**Zip:** N/A  
**Phone:** N/A  
**Fax:** N/A  
**Website Address:** N/A  
**School District:** N/A  
**Date School Will Begin:**  
**Grade Level or Student Ages to Be Served:** K-6  
**Number of Students to Be Served:** minimum of 175 to a maximum of 525  

### Conversion of an Existing Public School

**Name of Public School:**  
**Is the Entire School To Become a Charter School?**  
- [ ] Yes  
- [ ] No
School Governance

1. Administrative Structure

Principles of Administration

Summit Academy administration policies are governed by three fundamental principles:

*Stakeholder Representation* – All school stakeholders are entitled to participate in the decision-making process. Examples of stakeholders include students, parents, founding and advisory council members, staff, and district representatives.

*Open Proceedings* – To the fullest extent possible and in compliance with the spirit and letter of Utah State Law, administrative activities shall be open to all stakeholders. Exceptions are limited to a discrete class of activities in which privacy rights must be honored.

*Cooperative Posture with Jordan School District* – Summit Academy shall serve as a model of cooperation between members of the school community and members of the sponsoring school district. This includes frequent consultation, visits, open communication via the school’s web site and reviews by invitation beyond the mandates of State or District Code. We believe that a cooperative, not competitive, stance will encourage academic freedom and ensure the highest educational experience for the students.

Summit Governing Organizations

This section outlines the school’s administrative configuration and the mandate of those individuals and organizations entrusted to lead and manage the school. The *Summit Founding Council* is the “keeper of the vision” and defines curriculum and core policy. The *Summit Advisory Council* offers recommendations and assists in implementing the vision. The *Summit School Board* is responsible for daily operation of the school, hiring faculty and staff, and coordinating volunteer efforts. The *Summit Parent Organization* offers interested parents a means to participate in defining school policy. All members of the *School Board* are elected from the *Parent Organization*. The *Summit Student Council* brings student suggestions and ideas to the attention of the *Founding Council* and *School Board*. The *Summit Community Forum* consists of District and community representatives who offer suggestions, constructive criticism, and other feedback designed to improve the *Summit* educational experience.

For detailed policies regarding these organizations, please refer to the *Summit Academy Handbook*. 
Summit Founding Council

The Founding Council initially consists of those individuals originating Summit Academy. The council defines and shapes the school's vision, purpose, and core policy. Future council members shall uphold the principles upon which the school is established. Initial members of the Summit Founding Council are:

- CherryLee Morgan, Draper, Utah
- Coreen A. Smiley, Draper, Utah
- Craig A. Johnson, Draper, Utah

Some of the responsibilities of the Founding Council may include:

- Authoring the official charter.
- Amending the charter, in partnership with Jordan School District officials.
- Creating and administering the Summit Advisory Council. This includes appointing and removing council members.
- Defining initial Summit School Board policy.
- Authoring and approving Summit internal policies (e.g., “bylaws”).
- Defining and communicating school core values, principles, and policy as defined in the Summit School Handbook.
- Approving appointments to key administrative positions. These include the Principal, Assistant Principal, and Curriculum Director.
- Signing district assurances documents and honoring other legal commitments as required by state and district code.
- Renewing employment contracts for Summit employees.

Summit Advisory Council

The Summit Advisory Council is a group of “specialist volunteers” who advise the Founding Council and perform assignments to fulfill specific objectives of the charter.

Prior to the school’s first year of operation, the council shall be designated as the Summit Founding Advisory Council. Some of the council’s responsibilities may include:

- Offering advice to the Founding Council, based on the members’ professional expertise.
- Providing oversight to the Founding Council on policy decisions. The council’s contribution is especially significant in educational, legal, ethical, and financial matters.
- Assisting the Summit School Board in fulfilling their responsibilities.

Summit School Board

The Summit School Board oversees school operation. It is comprised of 5 parents whose children are registered to attend the school. The board’s responsibilities may include:

- Defining operational school policy.
• Hiring faculty and staff (*Founding Council* members must approve the selection of the Principal, Assistant Principal, and Curriculum Director).
• Overseeing school finances.
• Overseeing school procurements.
• Overseeing school facilities management.
• Approving school volunteer participation.
• Assisting in district and state reporting responsibilities.
• Calling for and holding elections to fill vacancies in the board.
• Ensuring that required assessments take place.

**Summit Parent Organization**

The *Summit Parent Organization* comprises the parents whose students are registered to attend *Summit Academy*. Some of the responsibilities of the organization may include:
• Organizing and maintaining the *Enhancement* program.
• Coordinating the efforts of volunteers for classroom help, class activities, field trips, assemblies, and other volunteer-based activities.
• Raising funds for supplementary materials and activities.
• Organizing an annual “uniform exchange.”
• Organizing elections to fill vacancies in the *Summit School Board*.

**Summit Student Council**

The *Summit Student Council* offers students meaningful and fun opportunities to participate in school operations. Any student may join the student council. At the beginning of each school year, members of the student council shall elect 1 representative from each grade 4-6. These representatives will meet monthly with the Student Council coordinator. The coordinator shall be a member of the Parent Organization and shall be appointed by the school board each year. The student council may be asked to fulfill specific assignments under the direction of the principal. At the coordinator’s discretion, the student council representatives and the coordinator may attend school board meetings and offer policy suggestions.

**Summit Community Forum**

At the request of the Founding Council, a Summit Community Forum shall be held. This forum is an opportunity for district and community members to tour, advise, inform, or otherwise participate in school operations. Examples of forum proceedings include:
• School “open house” nights.
• Press Conferences.
• Forum meetings focused on specific topics (e.g., curriculum improvement, technology).
2. Governing Board

Traditional Governing Board commitments shall be honored by the Summit School Board (see Question 1). Members of the Summit School Board are elected representatives of the Summit Parent Organization. Each school board member serves a term of no more than two (2) years. There are five (5) members of the board. When a vacancy arises, the Summit School Board calls for an election. The Parent Organization notifies its members of the vacancy and requests applications. An open meeting shall be held where applicants may present themselves to the parents. They are then voted on at the meeting by silent ballot. Those receiving the most votes are invited to serve on the board. Upon their acceptance, they shall declare, in writing, their intent to uphold the principles of Summit Academy and to fulfill their responsibilities as a member of the board.

3. Chief Administrative Officer

At the time of this writing, Summit Academy has not selected a Chief Administrative Officer. Upon acceptance of the charter and subsequent incorporation, Summit Academy shall conduct a search for qualified candidates.

The Summit Chief Administrative Officer shall be designated as the Principal of Summit Academy. The principal manages the school's daily operation. The Principal is subject to policy defined by the Summit School Board and Summit Founding Council. The principal is a key representative of the school, and, as such, bears the considerable responsibility of upholding school standards and values at all times.

Specific responsibilities of the principal may include:
- Serving as an *ex-officio* member of the Summit School Board.
- Recommending policy changes to the School Board.
- Recommending changes to school personnel.
- Promoting and overseeing school curriculum.
- Representing the school in public relations events.
- Providing arbitration services between parents and teachers (see School Governance - Complaints).
- Overseeing school finances.

4. Parent Involvement

The participation of Summit Academy parents is critical to the success of the school. It is acknowledged that many parents will choose Summit Academy largely because of the increased opportunity for significant involvement in defining school policies and manners of instruction. Given these considerations, many exciting and fulfilling opportunities exist for parents to contribute. A subset of these opportunities may include:
- Participating in the Summit Parent Organization.
- Serving on the Summit School Board.
- Serving on the Summit Advisory Council.
- Participating in the Summit Enhancement Program (See Curriculum and Instruction – Curriculum).
- Coordinating the efforts of volunteers for classroom help, class activities, field trips, assemblies, and other volunteer-based activities.
- Organizing the annual “Uniform Exchange”.
- Assessing and expressing the viewpoints of member parents on policy issues.

To help parents fulfill their important role, Summit Academy requests parents to:
- Read the Summit Academy Handbook and agree to abide by its terms.
- Inform the school community of professional experience they may have.
- Sign up for school volunteer time.

5. Communication with Parents

Parents and other members of the Summit Community will have opportunities to receive notifications through personal interactions, class and school correspondence, and through the Summit Information System (SIS). SIS services will be available through the Internet, and, at a time in the future, telephony and interactive voice response systems. Examples of notifications may include:
- Requests for volunteer participation.
- School extracurricular events.
- School board meetings or other official events.
- Vacancies in school organizations.
- Employment opportunities.
- Community events of interest.
- Standardized assessments and results.

The frequency of official correspondence shall be at the discretion of the school board, principal, and parent organization. When seeking to communicate officially, governing organizations shall abide by established procedures as defined in the Summit Academy Handbook.

6. Complaints

The issue management process at Summit Academy is guided by simple principles:
- Students, Parents, Teachers, and Administrators shall be treated with respect.
- The best interest of the students shall guide the proceedings.
- Complaints should normally be resolved by those parties directly involved. For example, a parent complaint with a teacher should be resolved between the parent and teacher directly. If difficulties arise, the parent and teacher should attempt to resolve the issue with the principal. The school board and founding council may be called upon as detailed in the Summit Academy Handbook.
Students

7. Notification

Upon acceptance of the charter, an awareness campaign shall be initiated to inform the community of the new school. Specific tenets of this campaign may include:

- Recruiting members of the Advisory Council.
- Holding public meetings to introduce parents to the school and to receive applications.
- Mass media releases.
- Web site creation and search engine population.

8. Selection

Enrollment is open to all students according to state and district code. For a detailed algorithm of the selection process, please consult the Summit Academy Handbook.

Selection Overview

- All students whose names appear on an official school enrollment form received and dated by the Founding Council shall be considered candidates for enrollment.
- The official enrollment form may be mailed, e-mailed, or delivered to the Council. The council shall notify the parents of acceptance of the form. Parents should not consider the application process complete until they receive official notification from the council.
- Students of Founding Council members shall be designated as council enrollees.
- Students of Staff members shall be designated as staff enrollees.
- Students of Advisory Council members shall be designated as priority applicants.
- All applicants who are non-council enrollees and non-priority applicants shall be designated as standard applicants.

Enrollment Summary:

- Council Enrollees and Staff Enrollees are guaranteed enrollment.
- Existing students are selected by lottery.
- Priority applicants are selected by lottery.
- Standard applicants are selected by lottery to fill the remaining openings.

**Should Summit Academy be approved for fall of 2003, The Academy may make use of temporary buildings to be located in the SunCrest Community. SunCrest has communicated a desire to negotiate land and buildings due to hardship conditions wherein SunCrest students must be driven to a location then bussed 20 minutes away to the nearest school. Should Summit Academy open in 2003 and use SunCrest facilities, we seek to grant additional priority status for SunCrest residents that shall not exceed 20% of the school’s population.**
9. Standards

Student conduct shall be subject to the usual and customary guidelines set forth by the Jordan School District. More detailed student conduct may be enforced by the Summit School Board.

Students will be required to wear uniforms. An acceptable uniform and dress code policy shall be drafted by the Founding Council and upheld by the Summit School Board. Parents shall be notified of uniform requirements prior to enrollment.

For more detailed information regarding student achievement standards, please consult the Summit Academy Handbook.

10. Dismissal

Dismissal guidelines and processes shall be in accordance with those set forth by the Jordan School District. All applicable statutes regarding due process will be upheld in the school’s practices regarding dismissal.
Staff

11. Screening and Selection

Summit Academy leadership seeks innovative, dynamic, professional faculty members to educate its students. Summit Academy will provide a motivating environment to give its faculty the opportunity to learn the chosen curricula and to employ innovative teaching methods.

It is the goal of the Founding Council to appoint at least one individual with significant, professional HR experience to the Summit Advisory Board. This advisor shall assist the council in drafting a comprehensive employment, compensation, and benefits policy.

The Summit School Board shall be responsible for recruiting, screening, and interviewing candidates for faculty and staff positions. The Founding Council will approve the selection of the Principal, Assistant Principal, and Director of Curriculum positions. The Principal will advise the other school board members during the interviewing and staff selection process.

Appropriate background checks shall be undertaken for any prospective employees in accordance with state and district code.

Summit Academy affirms that it shall not discriminate against any employee on the basis of race, creed, color, gender, national origin, religion, ancestry, age or disability in its recruitment, selection, training, utilization, termination or other employment-related activities.

12. Qualifications

Summit Academy seeks applicants for teaching positions possessing some or all of the following skills and/or experience:

- Prior teaching experience, especially within the chosen curricula.
- A demonstrated commitment to learn new curricula, as well as to propose improvements.
- Confidence in managing volunteer efforts and junior-level instructors.
- Demonstrated use of technology, both as a learning tool and to manage classroom activities.
- Additional certifications, degrees, or training relevant to elementary education.

Instructors and other staff members at Summit Academy should have experience in one or more of the following areas:

- Leading instruction sessions in the chosen curricula.
- Teaching and adapting instruction to young children.
• Certifications in specific curriculum instruction.

Prior to initiating the staff selection process, a detailed employment application shall be drafted in cooperation with the HR advisor on the Advisory Council.

13. Staffing Patterns

• Class size for the founding year shall not exceed 30 students per K-6 grade and is targeted for 25 students per class.
• Minimum student capacity is 175 students, equivalent to 1 class per grade. Maximum capacity is 525 students, equivalent to 3 classes per grade.
• The school shall hire 1 teacher per class and up to 1 instructor per grade level.
• The core subjects of Math, Reading, and Spelling & Writing shall be achievement-grouped, potentially spanning grades. Each group is targeted to contain 8-13 students.
• “Enhancement” sessions (see Curriculum and Instruction) shall be administered by the Parent Organization. Teachers, instructors, and staff members may also participate.
• If budget constraints allow, the school shall hire a dedicated technology instruction specialist. This individual will assist other staff members in using technology, oversee the technology lab, and honor teachers’ requests to lead technology instruction sessions with their students.

14. Teaching Schedule

• Teachers will receive instructional/curriculum in-service prior to the opening of school each year.
• Students of Summit Academy will receive 990 hours of instruction as per state law.
• Class will be dismissed early one day each week for the purpose of teacher preparation, inservice, parent conferences, staff meetings, etc.
• Formal Parent/Teacher conferences will be held twice each year.
Curriculum and Instruction

15. Purpose

Summit Academy's mission is to provide a quality education to elementary-age students emphasizing academic fundamentals, dynamic student-teacher interaction, and the discovery of each student's unique talents and interests. Parent, teacher, and staff innovation is encouraged and sought after in both instruction and policy.

The school provides a balanced learning approach, encompassing mastery of academic fundamentals, extracurricular activities, technology instruction, and a unique enhancement program giving parents and educators increased opportunities for specialized instruction.

16. Curriculum

It is the intent of Summit Academy to provide each student with a balanced education. Students who master fundamentals are able to use that knowledge to make evaluations, draw conclusions, and acquire higher-order thinking skills. Those skills are then applied during specialized knowledge acquisition. To accomplish these objectives, the initial curriculum is planned around the following programs:

Core Knowledge

E.D. Hirsch's Core Knowledge consists of a coherent, sequenced body of knowledge designed to prepare students to develop higher-order thinking skills. Each student builds on their foundation of knowledge, gaining specific insights from year to year. Subjects may include Language Arts, Science, History, Geography, Visual Arts, and Music.

Direct Instruction

Direct Instruction (DI) methodology aligns with the Core Knowledge model of explicit, incremental, and sequential instruction. It includes the following:

- Field-tested reading, spelling, language arts, and math programs.
- Interactive lessons require frequent verbal responses from students.
- Teachers monitor and correct errors immediately.
- Lessons are presented to small groups of students.
- Students are grouped by performance level.
- Frequent assessment of student progress gives parents and teachers targeted feedback.
- Presentation books provide for maximum effectiveness and efficiency during instruction.

(Reproduced in part from the SRA web site)
Saxon Math

The Saxon Math approach is incremental, sequential, and comprehensive. Topics are continually reviewed during the year as students master basic concepts then add more complexity.

Enhancement Program

Enhancement is a unique, volunteer-based program where specialized subjects are taught in small groups. Structured lesson plans of 4 or 8 weekly sessions are submitted by parents, teachers, staff, or other community members. The Enhancement committee reviews and approves lessons. Several Enhancement options are made available to the students, who register for specific subjects based on their interest or aptitude.

The Enhancement program offers parents opportunities for targeted, meaningful involvement in the educational process. It presents students with experiences in new and diverse subjects. The Enhancement program provides concise, specific instruction on topics that complement the core curriculum. It is anticipated that a 30-45 minute session once per week will meet the objectives of the program.

Other – Supplemental Curriculum will be added as needed and may include the following:
- Technology
- Art
- Physical Education

17. Calendar

Summit Academy intends to be a traditional school and follow the general school calendar from the district in which it resides.

The Academy will meet the state requirements of 180 days and 990 hours of instruction per school year.

18. Extracurricular Activities

Summit Academy may provide field trips throughout the year for each class. Parents will be notified in advance and may be asked to volunteer for staffing or transportation.

Summit Academy may provide after-school activities based on parent and student interest. Such activities may include but are not limited to:
- Choir
- Band
- Orchestra
- Athletics

Field trips and extracurricular activities shall be reviewed and approved by the School Board on a case-by-case basis.
Student Assessment

19. Instruments and Procedures

Summit Academy will comply with the state testing schedule for the SAT9 and the CRT. Summit Academy’s core curriculum revolves around mastery of fundamental subjects. To assess mastery, Academy staff will implement assessments based on Core Knowledge, Direct Instruction, and Saxon Math standards. The frequency of these assessments will be based on the pace and level of each Achievement Group and/or grade.

20. Reporting and Use

Testing results will be reported to the district and state as required by law. Parents shall be notified of all results and invited for Parent/Teacher consultations. A committee of parents, administration, and board members shall collect data, provide statistical results, and review the overall results of the students. These results shall be reported to the school board, founding council, and members of the Advisory board.

Upon the full implementation of the Summit Information System (SIS), parents may track the achievement and mastery of their students via a secure Internet site.
Finances and Reporting

21. Start-up Funds

Summit Academy will apply for state start-up funds set aside to aid new charter schools for the first five years of operation. We will also request any and all current or future funds set aside by the state for Charter School use. The Academy will seek additional funding through such sources as public and private grants, corporate sponsors, and fundraising.

Summit Academy reserves the right to make budget modifications, cutbacks in administration, etc., should these funds not become available.

22. Revenues and Expenditures

Please see the attached Summit Academy 3-5 Year Budget Plan.

23. Accounting Policies and Procedures

Summit Academy will follow the State Office of Education’s guidelines for accounting, reporting and auditing of Utah Schools. Financial reporting will be in compliance with Generally Accepted Accounting Principles (GAAP).

Disbursements from the Academy’s operational accounts will require the signature of the Principal and the designated School Board Treasurer. Both signatories will be accountable to the Summit School Board and Founding Council.

Monthly accounting reports (revenue, expenditures, balance sheet, etc.) shall be presented to the School Board for review.

The Academy reserves the right to contract out services that may include bookkeeping/accounting, payroll, benefits, etc.

The Academy’s fiscal year will run concurrently from July 1st to June 30th.

24. Insurance

Summit Academy shall maintain liability insurance as required by state or district code. The Academy may choose to contract through Utah State Risk Management.
25. Fees

Summit Academy shall comply with standard district regulations regarding the collection of fees.

Summit Academy students will be required to purchase uniforms as set forth in the “Standards” section (9).

26. Responsibility

The Principal will be responsible for filling out and submitting reports to the State Board as set forth in the Utah Charter School Act.

Summit Academy agrees to participate in an independent yearly audit by a certified public accountant of all its financial and administrative operations. Results from this audit will be reviewed by the Summit School Board, submitted according to state law, and available upon request.
Support Services

27. Transportation

Summit Academy will not provide transportation services for students. The Summit Parent Organization may assist in organizing carpools.

28. Food Services

Summit Academy will not initially sponsor school breakfast or lunch services. Students will be expected to bring their lunch to school. This policy is subject to change by enactment of the Summit School Board.

29. Health and Safety

Summit Academy will contract custodial services and parent volunteers will help to maintain the facility. The Academy will adhere to all state health and safety codes and inspections prior to facility occupancy.

30. Emergencies

Summit Academy will hold fire and natural disaster drills according to district policy.

In the event of serious or life-threatening injury, Emergency Services shall be summoned immediately and parents/guardians will be notified.

Each student is required to submit a health record to the school describing any health concerns. Identified concerns will be marked and teachers and staff will be given appropriate training should they be required to assist in an emergency.

In the case of an emergency, first aid, or illness, parents/guardians will be contacted immediately.
# Appendix A - Summit Academy 3-5 Year Budget Plan

**WPU** = $2,150  
**# of Students 1-6** = 300  
**# of Kindergartners** = 50

## Revenue

<table>
<thead>
<tr>
<th>Source of Revenue</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
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## Revenue from Federal Sources

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## Revenue from Local Sources

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<td>Carryover from Prior Year</td>
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<td>Other Financing (Loan)</td>
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<td>Total Revenues:</td>
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## Expenditures

### Personnel

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<th>Position</th>
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<th>Year 4</th>
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<td>Vice Principal</td>
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<td>Curriculum Implementation Specialist</td>
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<td>Teachers (14 @ $30,000)</td>
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<td>Retirement Benefits</td>
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<td>Building &amp; Land Lease ($20,000/month)</td>
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<td>Telephone &amp; Internet</td>
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<td>Insurance (Liability, Property, etc.)</td>
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<td>Building Repairs</td>
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<td>Custodial Services ($50/day for 184 days)</td>
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## Supplies and Materials

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<th>Item</th>
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<th>Year 5</th>
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<td>School Library (Books, Periodicals, Audiovisuals)</td>
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<td>Property</td>
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<td>Classroom Furniture</td>
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25,244  139,006  279,915  272,435  246,016
UTAH CHARTER SCHOOLS
Assurances

The applicant charter school hereby assures and certifies to the State Superintendent of Public Instruction that:

A. The charter school will make provision for such fiscal control and fund accounting procedures as may be necessary to assure proper disbursement and accounting for all funds, including a monthly submission of a financial report of revenue, expenditures, and student enrollment.

B. The charter school will maintain a clear, written procedure and process for auditing school finances as per the requirements of the Utah State Office of Education.

C. The charter school gives the Utah State Office of Education or the U.S. Comptroller General, through any authorized representative, the access to, and the right to examine, all records, papers, or other documents related to all funds, including the submission of reports as may be required.

D. The charter school will provide written evidence of liability and other appropriate insurance coverages, including a description of the levels of coverage and the relationship of these coverages to local and state agency obligations.

E. The charter school will make such reports, including reports of evaluations, in such form and containing such information as the State Superintendent of Public Instruction may reasonably require to carry out his legislative functions and to determine the extent to which funds have been effective in carrying out legislative purposes and project objectives.

F. The charter school will comply with appropriate rules, regulations, and state guidelines except as specifically waived by the Utah State Board of Education, and effective control will be maintained over, and accountability provided, for all funds, property, and other assets. The charter school will also adequately safeguard all public property and shall assure that it is used solely for authorized purposes.

G. All physical assets purchased with public funds become the property of the Utah State Board of Education upon the termination of the charter school.

H. The charter school will comply with the requirements of the Family Educational Rights and Privacy Act of 1974.

I. The charter school will comply with Title VI of the Civil Rights Act of 1964 prohibiting discrimination in program benefits, participation, employment, or treatment on the basis of race, color, or national origin, and in compliance with the provisions of Title IX of the Education Amendments of 1972 prohibiting discrimination on the basis of sex.

J. The charter school assures that no otherwise qualified person shall, on the basis of a disability, be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity that receives or benefits from local, state, or federal financial assistance.

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

L. The charter school will function under an open admission policy on the same basis as other public schools. If the number of students applying to enroll exceeds the capacity of the school or of programs, classes, or grade levels within the school, then those to be admitted shall be chosen at random from among the applicants, within the allowable mandatory and optional preferences specified.

http://www.usoe.k12.ut.us/charterschools/form_assurances.htm
in Section 53A-1a-506, Utah Code Annotated.

M. The charter school assures that it will not conduct a program of instruction until such time as:

(1) The requisite health and safety standards for the school building have been met according to the local fire and health department inspectors;
(2) Adequate equipment, materials, and guidance and counseling services are available; and,
(3) Conditions are adequate to provide for the economical operation of the school with an adequate learning environment.

N. The charter school will comply with all applicable federal and state laws, rules, and regulations regarding the recruitment, screening, selection, and evaluation of all school employees.

O. The charter school will only employ educators who hold valid Utah Professional Educator Licenses or who meet State Board requirements for alternative licensing routes or Board authorization.

P. The charter school will employ the use of the Utah State Core Curriculum as the foundation for the instructional program for the school.

Q. The charter school will employ the use of the Stanford Achievement Test Ninth Edition and the Utah State Core Curriculum End-of-Level Tests as a fundamental part of the overall assessment program for the school.

R. 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.

S. The charter school will operate with a written procedure for student suspension, and dismissal, including appeal procedures.

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

U. The charter school will function under the stipulations of a clear, written agreement with the districts of student residence regarding the involvement of students in extracurricular activities and/or interscholastic activities governed by the Utah High School Activities Association, if such programs are offered.

V. The charter school will not charge tuition or fees, except those fees normally charged to other public schools.

W. The charter school will operate under the provisions of the Utah Open Meeting Law.

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

Y. The charter school will submit an appropriately amended application prior to any material change affecting the purpose, administration, organization, or operation of the school.

Z. A secondary charter school will be accredited or in the process of seeking accreditation.

The chief administrative officer 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 and chief administrative officer of the proposed charter school.
charter school: Summit Academy

Name (type): Craig A. Johnson

Title (type): Member, Founding Council

Signature: [Signature]

Date: 11 April 2003
September 24, 2003

Patricia Bradley, Coordinator
Planning and Education Programs
Utah State Office of Education
250 East 500 South
P.O. Box 144200
Salt Lake City, Utah 84114-4200

Dear Patricia,

Please find enclosed a copy of the Summit Academy Charter School Application. Also, I am providing you with copies of the chronological letters that occurred through the process, until the completed charter application was granted.

Should you find it necessary to obtain the curriculum section, I would be happy to provide it upon your request.

Please feel free to contact me should you have any questions or need further information.

Sincerely,

[Signature]

Sherry Wasden
Deputy Superintendent Instructional Services

SW:mhn

Enclosure
September 18, 2003

Patricia Bradley
Utah State Office of Education
Planning and Education Programs
250 East 500 South
P.O. Box 144200
Salt Lake City, UT 84114-4200

Dear Patricia:

The Summit Academy Charter School applicant has fulfilled all of the requirements of the Board of Education regarding charter status. This letter is to inform you that Jordan School District Board of Education granted charter to the Summit Academy in the July 15, 2003 Board meeting.

Enclosed is a copy of the letter sent to Cherry Lee P. Morgan informing her of the Board of Education action.

Should you have any question, please feel free to call me at 567-8326 or email me at sherry.wasden@jordan.k12.ut.us.

Sincerely,

Sherry Wasden
Deputy Superintendent of Instructional Services

SW:mhn

Enc.
August 18, 2003

Cherry Lee P. Morgan
522 High Berry Lane
Draper, Utah 84020

Subject: Summit Academy Charter

Dear Mrs. Morgan:

Congratulations in fulfilling all of the requirements of the Board of Education regarding your request for a charter for the Summit Academy. This letter is to inform you that in accordance with action taken by the Jordan School District Board of Education on July 15, 2003, the Summit Academy is hereby officially chartered.

We extend our willingness to continue to be of assistance to you as you now put in place the provisions of your charter. Please continue to keep us informed of your progress and alert us to any considerations you may have that could alter any of the details of your charter as presently constituted. We look forward to a continuing, positive working relationship.

Sincerely,

Barry L. Newbold, Ed.D.

cc: Jordan School District Board of Education
   Superintendent Steven O. Laing
   Administrative Cabinet
August 18, 2003

CherryLee P. Morgan
522 High Berry Lane
Draper, Utah 84020

Subject: Summit Academy Charter

Dear Mrs. Morgan:

Congratulations in fulfilling all of the requirements of the Board of Education regarding your request for a charter for the Summit Academy. This letter is to inform you that in accordance with action taken by the Jordan School District Board of Education on July 15, 2003, the Summit Academy is hereby officially chartered.

We extend our willingness to continue to be of assistance to you as you now put in place the provisions of your charter. Please continue to keep us informed of your progress and alert us to any considerations you may have that could alter any of the details of your charter as presently constituted. We look forward to a continuing, positive working relationship.

Sincerely,

Barry L. Newbold, Ed.D.

cc: Jordan School District Board of Education
    Superintendent Steven O. Laing
    Administrative Cabinet
July 21, 2003

Summit Academy Charter School
Board of Directors
% CherryLee P. Morgan
522 High Berry Lane
Draper, Utah 84020

Dear CherryLee:

Attached is a copy of a memo from Brenda Hales, Executive Director of Curriculum and Staff Development, outlining necessary changes to the curriculum section of the application. The recommended changes will need to be made and submitted to my office on or before August 15, 2003. The conditional approval of the Charter by the Board of Education was made only if the information was completed and submitted by August 15. If this deadline is not met, you will need to reapply for Charter School status.

Should you have any questions concerning the recommendation, you are welcome to call me at 567-8326, or Brenda Hales, at 567-8367.

Thank you in advance for your willingness to complete the recommendations outlined.

Sincerely,

Sherry Wasden
Deputy Superintendent

SW:mhn
DATE: July 8, 2003

TO: Barry L. Newbold, Superintendent of Schools
    Sherry Wasden, Deputy Superintendent of Instructional Services

FROM: Brenda Hales, Executive Director of Curriculum and Staff Development

SUBJECT: Summit Academy Charter School Curriculum Correlation

The Curriculum and Staff Development Department has completed the requested review of Summit Academy’s proposed curriculum correlation materials. Our evaluation and recommendations are as follows:

1. The proposed curriculum and instruction schema contained in the binder included a copy of the old state core curriculum with suggested read alouds, literature for students and grammar concepts to be taught.
2. A physical education curricula was not included for review.
3. Proposed basals, texts, guided readers, manipulatives, technology, and other instructional materials were not included for review.
4. A basic philosophy of instruction for each content area (reading, language arts, math, science, social studies, the arts, health and physical education) was not included for review.
5. A daily schedule was not included for review.
6. An organizational overview of teacher expectations and professional development was not included for review.
7. The proposed assessment strategy for formative purposes was not included for review.
8. The method and time frame for informing parents of progress and achievement was not included for review.

Recommendations
A. We recommend that the new state core be used. The updated core is available on the USOE website.
B. We recommend that physical education be included in the curriculum plan.
C. We recommend that the charter applicant provide the district with the missing information described in items 2-8 above for review.
D. We recommend that the charter be approved if the recommendations in A, B, & C are met by August 15, 2003.